

# Global Smoke Flue Gas Monitoring Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Smoke Flue Gas Monitoring Equipment market size is expected to reach \$ 1263 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

Smoke flue gas monitoring equipment is a specialized environmental monitoring instrument used for real-time, continuous, or intermittent detection of particulate matter (smoke) concentration and gaseous pollutant concentration emitted into the atmosphere from fixed pollution sources such as coal-fired boilers, industrial kilns, cement kilns, steel sintering machines, garbage incinerators, etc. Its core working principle includes: measuring the smoke and dust content in flue gas using principles such as laser backscatter, turbidity method, or beta ray absorption; Simultaneously monitor the emission concentrations of gaseous pollutants such as sulfur dioxide (SO<sub>2</sub>), nitrogen oxides (NO<sub>x</sub>), carbon monoxide (CO), oxygen (O<sub>2</sub>), and hydrogen chloride (HCl) using non dispersive infrared (NDIR), ultraviolet differential absorption (DOAS), Fourier transform infrared (FTIR), or electrochemical sensors. This type of equipment is usually installed at the chimney or flue exhaust outlet. Through direct sampling, dilution sampling, or in-situ measurement, the sample gas is introduced into the analysis unit for quantitative analysis, and the data is uploaded in real time to the environmental supervision platform. It is a key technical support for implementing the pollutant discharge permit system, collecting environmental protection and bonded taxes, and ensuring compliance with emission standards through enterprise self inspection.

The industrial chain of smoke flue gas monitoring equipment covers core component suppliers such as sensors, lasers, spectrometers, and data acquisition systems in the upstream, equipment integration and manufacturers in the midstream, and terminal application fields such as thermal power, steel, cement, and waste incineration in the

downstream. Regarding gross profit margin, there are significant differences in different technological routes and product types: the overall gross profit margin of the industry is roughly between 25% and 40%, with laser scattering equipment with higher technical barriers achieving a gross profit margin of 45% to 58%, while online monitoring systems for gaseous pollutants have relatively low gross profit margins (about 17%) due to fierce competition.

The average price of smoke flue gas monitoring equipment in 2025 is 60 k US dollars per unit, with a sales volume of 16.4 k units and a total production capacity of 23.4 k units.

The smoke and dust monitoring equipment has been upgraded from a compliance tool that meets environmental regulations to a data core that drives green production and intelligent environmental decision-making for enterprises. Under the dual pressure of the 'dual carbon' goal and ultra-low emission transformation, its value lies not only in real-time quantification of SO<sub>2</sub>, NO<sub>x</sub>, and particulate matter concentrations to ensure continuous compliance, but also in helping enterprises identify process anomalies, optimize combustion efficiency, and account for carbon emissions data through high-precision sensors and big data analysis. As industry competition shifts from 'selling equipment' to 'selling data+services', the core barriers for equipment manufacturers are shifting from hardware to the accuracy of algorithm models and the timeliness of system operation and maintenance. The future monitoring system will inevitably evolve towards miniaturization, lower cost, and grid deployment to achieve comprehensive and precise control of pollution sources.

This report studies the global Smoke Flue Gas Monitoring Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Smoke Flue Gas Monitoring Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Smoke Flue Gas Monitoring Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Smoke Flue Gas Monitoring Equipment total production and demand, 2021-2032, (K Units)

Global Smoke Flue Gas Monitoring Equipment total production value, 2021-2032, (USD Million)

Global Smoke Flue Gas Monitoring Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Smoke Flue Gas Monitoring Equipment consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Smoke Flue Gas Monitoring Equipment domestic production, consumption, key domestic manufacturers and share

Global Smoke Flue Gas Monitoring Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Smoke Flue Gas Monitoring Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Smoke Flue Gas Monitoring Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Smoke Flue Gas Monitoring Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens, ABB, Horiba, Fuji Electric, Yokogawa, Sick AG, Endress+Hauser, Emerson, Teledyne, Xylem, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Smoke Flue Gas Monitoring Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Smoke Flue Gas Monitoring Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Smoke Flue Gas Monitoring Equipment Market, Segmentation by Type:

Four Parameter Module

Six Parameter Module

Ten Parameter Module

Global Smoke Flue Gas Monitoring Equipment Market, Segmentation by Handling Method:

Hot Wet Method

Cold Dry Method

Global Smoke Flue Gas Monitoring Equipment Market, Segmentation by Usage:

Portable

Fixed Type

Global Smoke Flue Gas Monitoring Equipment Market, Segmentation by Application:

Urban Environment Detection

Industrial Gas Emission Testing

Automobile Exhaust Emission Detection

Companies Profiled:

Siemens

ABB

Horiba

Fuji Electric

Yokogawa

Sick AG

Endress+Hauser

Emerson

Teledyne

Xylem

HACH

TESTO

Focused Photonics (Hangzhou)

Beijing SDL Technology

Anhui Wanyi Science and Technology

## Sailhero Environmental Protection High-Tech

### Hangzhou Zetian Technology

#### Key Questions Answered:

1. How big is the global Smoke Flue Gas Monitoring Equipment market?
2. What is the demand of the global Smoke Flue Gas Monitoring Equipment market?
3. What is the year over year growth of the global Smoke Flue Gas Monitoring Equipment market?
4. What is the production and production value of the global Smoke Flue Gas Monitoring Equipment market?
5. Who are the key producers in the global Smoke Flue Gas Monitoring Equipment market?
6. What are the growth factors driving the market demand?

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