

# Global Thermogravimetric Determinator Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Thermogravimetric Determinator market size is expected to reach \$ 216 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

In 2025, global Thermogravimetric Determinator sales reached approximately 4,910 Units, with an average global market price of around 32.91 K USD per Unit.

A Thermogravimetric Determinator is a high-precision analytical instrument that utilizes Thermogravimetric Analysis (TGA) to measure the relationship between a substance's mass and temperature or time under programmed temperature control. Its core function lies in capturing minute mass changes of a sample during heating or isothermal processes via a precision microbalance, enabling the quantitative analysis of compositional makeup, thermal stability, and decomposition kinetics. As a cornerstone of material science and quality control, this apparatus is extensively applied in coal coking, biomass energy, polymer science, and pharmaceutical R&D, serving as a critical technical means for evaluating thermal mass loss, oxidative gain, and volatile content.

The supply chain of Thermogravimetric Determinators begins upstream with high-precision sensors (microbalances), high-temperature furnace materials (e.g., ceramic or platinum crucibles), precision temperature control systems, and data acquisition software. Midstream consists of instrument manufacturers and integrators responsible for precision mechanical assembly, circuit integration, and core algorithm development. Downstream users encompass a broad range of sectors, including large industrial enterprises (power, metallurgy), research institutes, third-party testing agencies, and pharmaceutical companies. The industry typically operates under a 'Core Component

Autonomy + Standardized Assembly' model, while high-end customized models (such as simultaneous thermal analyzers) follow a 'Build-to-Order' R&D approach. According to annual reports and brokerage research, gross margins for such precision instruments remain high: international leading brands achieve 55% - 70%, while top-tier domestic players have stabilized between 40% and 55%.

### Market Development Opportunities & Main Driving Factors

The market for Thermogravimetric Determinators is currently in a critical expansion phase, transitioning from traditional industrial analysis to high-end material R&D. According to recent brokerage reports, the global surge in demand for high-performance energy storage batteries (such as solid-state batteries) and composite materials has directly escalated requirements for thermogravimetric precision; thermal failure analysis has now become a mandatory component of battery safety evaluation. Simultaneously, sustained government investment in research infrastructure, particularly favorable policies like interest-subsidized loans for laboratory equipment upgrades, has fully activated the replacement demand within research institutions. With the rise of the 'AI Lab' concept, high-throughput thermogravimetric equipment integrating autosampling and intelligent data interpretation is becoming a strategic choice for enterprises to boost R&D efficiency and reduce labor costs.

### Market Challenges, Risks, & Restraints

The core challenges facing the industry lie in the resilience of the high-end supply chain and fluctuations in the international trade environment. Annual reports indicate that while localization rates are increasing yearly, the global supply of core components such as ultra-micro sensors and high-end temperature control chips remains concentrated among a few leading suppliers. Consequently, export control risks triggered by geopolitics remain a significant uncertainty for enterprises. Furthermore, market competition is intensifying, with price wars in the low-end segment squeezing the profit margins of smaller firms. Technologically, downstream clients are increasingly demanding 'multi-physics field coupling' (such as TGA-FTIR-MS hyphenation), posing a major challenge to companies' cross-disciplinary technical reserves and capacity for sustained R&D investment.

### Downstream Demand Trends

Downstream demand is exhibiting distinct characteristics of 'on-line integration' and 'regulatory compliance.' In the pharmaceutical and fine chemical sectors, driven by

heightened requirements for data integrity from regulatory bodies (such as NMPA and FDA), digital thermogravimetric systems supporting audit trails and permission management have become a necessity. Under the 'Dual Carbon' framework, the demand for rapid thermogravimetric analysis of coal and biomass fuels in the steel and power industries has extended from laboratories to production sites, requiring equipment with stronger environmental adaptability and automation. Additionally, with the popularization of additive manufacturing (3D printing), the need for thermal property screening of powder raw materials has emerged as a new growth pole, with portable and modular thermogravimetric tools gaining favor among small and medium-sized tech enterprises.

This report studies the global Thermogravimetric Determinator production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Thermogravimetric Determinator 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 Thermogravimetric Determinator that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Thermogravimetric Determinator total production and demand, 2021-2032, (Units)

Global Thermogravimetric Determinator total production value, 2021-2032, (USD Million)

Global Thermogravimetric Determinator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Thermogravimetric Determinator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Thermogravimetric Determinator domestic production, consumption, key domestic manufacturers and share

Global Thermogravimetric Determinator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Thermogravimetric Determinator production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Thermogravimetric Determinator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Thermogravimetric Determinator 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 TA Instruments (Waters), Mettler-Toledo, NETZSCH, PerkinElmer, Shimadzu, Hitachi High-Tech, Linseis, SETARAM (KEP Technologies), LECO Corporation, ELTRA (VERDER), 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 Thermogravimetric Determinator market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Thermogravimetric Determinator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermogravimetric Determinator Market, Segmentation by Type:

General-Pressure TGA Determinator

High-Pressure TGA Determinator

Global Thermogravimetric Determinator Market, Segmentation by Instrument Structure:

Suspension Type

Top-loading Type

Horizontal Type

Global Thermogravimetric Determinator Market, Segmentation by Measurement Principle:

Isothermal Thermogravimetry

Dynamic Thermogravimetry

Quasi-static Thermogravimetry

Global Thermogravimetric Determinator Market, Segmentation by Automation Level:

Manual

Autosampler

## Global Thermogravimetric Determinator Market, Segmentation by Application:

Academic & Research

Chemical & Petrochemical

Pharma & Biotech

Food & Beverages

Energy & Batteries

Others

## Companies Profiled:

TA Instruments (Waters)

Mettler-Torred

NETZSCH

PerkinElmer

Shimadzu

Hitachi High-Tech

Linseis

SETARAM (KEP Technologies)

LECO Corporation

ELTRA (VERDER)

Rigaku

Sundy

Beijing Henven

Nanjing Dazhan Testing Instrument

Beijing JWGB Sci & Tech

Nanjing Huicheng Instrument

SCINCO

Precisa (Techcomp)

Shanghai HESON

Shanghai Jiahang Instruments

Beijing Jingyi Gaoke Instrument

Beijing Beiguang Hongyuan Instrument

FLSmidth

Navas Instruments

Torontech

Sylab (Orbit Technologies)

### **Key Questions Answered:**

1. How big is the global Thermogravimetric Determinator market?
2. What is the demand of the global Thermogravimetric Determinator market?
3. What is the year over year growth of the global Thermogravimetric Determinator market?
4. What is the production and production value of the global Thermogravimetric

Determinator market?

5. Who are the key producers in the global Thermogravimetric Determinator market?

6. What are the growth factors driving the market demand?

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