

# Global XRF Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global XRF market size is expected to reach \$ 1410 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

XRF (X-ray fluorescence) is a non-destructive analytical technique used to determine the elemental composition of materials. XRF analyzers determine the chemistry of a sample by measuring the fluorescent (or secondary) X-ray emitted from a sample when it is excited by a primary X-ray source. In 2025, global XRF production reached approximately 15533 units. The upstream segment of the XRF industry mainly consists of precision electronic components, X-ray generation modules, detection systems, and specialized structural materials. Core inputs include X-ray tubes, high-voltage power supplies, semiconductor detectors (such as silicon drift detectors, SDD), scintillation detectors, and advanced X-ray optics. In addition, electronic modules, embedded processors, cooling systems, shielding materials (lead or composite radiation shielding), and precision mechanical housings play a critical role in determining instrument performance, stability, and lifespan. The upstream supply chain is characterized by high technical barriers, strict quality requirements, and a strong dependence on specialized component suppliers, particularly for detectors and X-ray source technologies.

XRF are widely used elemental analysis instruments that enable rapid, non-destructive identification and quantification of materials across industrial, environmental, and regulatory applications. The global XRF analyzers market is characterized by a diverse product mix, including handheld, benchtop, laboratory-grade, and process/online systems, serving industries such as mining, cement, petroleum & chemicals, environmental monitoring, food & pharmaceuticals, and materials recycling. Among different technologies, Energy Dispersive XRF (EDXRF) dominates in terms of shipment volume due to its portability, lower cost, and broad applicability, while Wavelength

Dispersive XRF (WDXRF) remains indispensable in high-precision laboratory and quality-control environments.

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

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

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

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

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

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

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

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

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

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

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

This report profiles key players in the global XRF 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 AMETEK, Thermo Fisher, Bruker, Rigaku, Shimadzu, Evident Corporation, Skyray, HORIBA, Hitachi High-tech, Malvern Panalytical, 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 XRF 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 XRF Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

**Global XRF Market, Segmentation by Type:**

Energy Dispersive (EDXRF)

Wavelength Dispersive (WDXRF)

**Global XRF Market, Segmentation by Shape:**

Bench-top

Portable

Handheld

Global XRF Market, Segmentation by Automation Level:

Manual XRF Systems

Semi-automated XRF Systems

Fully Automated/ Inline XRF Systems

Global XRF Market, Segmentation by Throughput:

Low-throughput XRF

Medium-throughput XRF

High-throughput XRF

Global XRF Market, Segmentation by Application:

Mining Industry

Cement

Food & Pharmaceutical

Environmental

Petroleum & Chemicals

Others

Companies Profiled:

AMETEK

Thermo Fisher

Bruker

Rigaku

Shimadzu

Evident Corporation

Skyray

HORIBA

Hitachi High-tech

Malvern Panalytical

Focused Photonics

BSI

Shanghai Jingpu Science & Technology

Suzhou LANScientific

X-Ray Optical Systems (XOS)

### **Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 XRF Introduction
- 1.2 World XRF Supply & Forecast
  - 1.2.1 World XRF Production Value (2021 & 2025 & 2032)
  - 1.2.2 World XRF Production (2021-2032)
  - 1.2.3 World XRF Pricing Trends (2021-2032)
- 1.3 World XRF Production by Region (Based on Production Site)
  - 1.3.1 World XRF Production Value by Region (2021-2032)
  - 1.3.2 World XRF Production by Region (2021-2032)
  - 1.3.3 World XRF Average Price by Region (2021-2032)
  - 1.3.4 North America XRF Production (2021-2032)
  - 1.3.5 Europe XRF Production (2021-2032)
  - 1.3.6 China XRF Production (2021-2032)
  - 1.3.7 Japan XRF Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 XRF Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 XRF Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World XRF Demand (2021-2032)
- 2.2 World XRF Consumption by Region
  - 2.2.1 World XRF Consumption by Region (2021-2026)
  - 2.2.2 World XRF Consumption Forecast by Region (2027-2032)
- 2.3 United States XRF Consumption (2021-2032)
- 2.4 China XRF Consumption (2021-2032)
- 2.5 Europe XRF Consumption (2021-2032)
- 2.6 Japan XRF Consumption (2021-2032)
- 2.7 South Korea XRF Consumption (2021-2032)
- 2.8 ASEAN XRF Consumption (2021-2032)
- 2.9 India XRF Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World XRF Production Value by Manufacturer (2021-2026)

- 3.2 World XRF Production by Manufacturer (2021-2026)
- 3.3 World XRF Average Price by Manufacturer (2021-2026)
- 3.4 XRF Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global XRF Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for XRF in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for XRF in 2025
- 3.6 XRF Market: Overall Company Footprint Analysis
  - 3.6.1 XRF Market: Region Footprint
  - 3.6.2 XRF Market: Company Product Type Footprint
  - 3.6.3 XRF Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: XRF Production Value Comparison
  - 4.1.1 United States VS China: XRF Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: XRF Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: XRF Production Comparison
  - 4.2.1 United States VS China: XRF Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: XRF Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: XRF Consumption Comparison
  - 4.3.1 United States VS China: XRF Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: XRF Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based XRF Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based XRF Manufacturers, Headquarters and Production Site (States, Country)
  - 4.4.2 United States Based Manufacturers XRF Production Value (2021-2026)
  - 4.4.3 United States Based Manufacturers XRF Production (2021-2026)
- 4.5 China Based XRF Manufacturers and Market Share

4.5.1 China Based XRF Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers XRF Production Value (2021-2026)

4.5.3 China Based Manufacturers XRF Production (2021-2026)

4.6 Rest of World Based XRF Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based XRF Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers XRF Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers XRF Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World XRF Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Energy Dispersive (EDXRF)

5.2.2 Wavelength Dispersive (WDXRF)

5.3 Market Segment by Type

5.3.1 World XRF Production by Type (2021-2032)

5.3.2 World XRF Production Value by Type (2021-2032)

5.3.3 World XRF Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY SHAPE**

6.1 World XRF Market Size Overview by Shape: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Shape

6.2.1 Bench-top

6.2.2 Portable

6.2.3 Handheld

6.3 Market Segment by Shape

6.3.1 World XRF Production by Shape (2021-2032)

6.3.2 World XRF Production Value by Shape (2021-2032)

6.3.3 World XRF Average Price by Shape (2021-2032)

## **7 MARKET ANALYSIS BY AUTOMATION LEVEL**

7.1 World XRF Market Size Overview by Automation Level: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Automation Level

7.2.1 Manual XRF Systems

7.2.2 Semi-automated XRF Systems

- 7.2.3 Fully Automated/ Inline XRF Systems
- 7.3 Market Segment by Automation Level
  - 7.3.1 World XRF Production by Automation Level (2021-2032)
  - 7.3.2 World XRF Production Value by Automation Level (2021-2032)
  - 7.3.3 World XRF Average Price by Automation Level (2021-2032)

## **8 MARKET ANALYSIS BY THROUGHPUT**

- 8.1 World XRF Market Size Overview by Throughput: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Throughput
  - 8.2.1 Low-throughput XRF
  - 8.2.2 Medium-throughput XRF
  - 8.2.3 High-throughput XRF
- 8.3 Market Segment by Throughput
  - 8.3.1 World XRF Production by Throughput (2021-2032)
  - 8.3.2 World XRF Production Value by Throughput (2021-2032)
  - 8.3.3 World XRF Average Price by Throughput (2021-2032)

## **9 MARKET ANALYSIS BY APPLICATION**

- 9.1 World XRF Market Size Overview by Application: 2021 VS 2025 VS 2032
- 9.2 Segment Introduction by Application
  - 9.2.1 Mining Industry
  - 9.2.2 Cement
  - 9.2.3 Food & Pharmaceutical
  - 9.2.4 Environmental
  - 9.2.5 Petroleum & Chemicals
  - 9.2.6 Others
- 9.3 Market Segment by Application
  - 9.3.1 World XRF Production by Application (2021-2032)
  - 9.3.2 World XRF Production Value by Application (2021-2032)
  - 9.3.3 World XRF Average Price by Application (2021-2032)

## **10 COMPANY PROFILES**

- 10.1 AMETEK
  - 10.1.1 AMETEK Details
  - 10.1.2 AMETEK Major Business
  - 10.1.3 AMETEK XRF Product and Services

10.1.4 AMETEK XRF Production, Price, Value, Gross Margin and Market Share  
(2021-2026)

10.1.5 AMETEK Recent Developments/Updates

10.1.6 AMETEK Competitive Strengths & Weaknesses

10.2 Thermo Fisher

10.2.1 Thermo Fisher Details

10.2.2 Thermo Fisher Major Business

10.2.3 Thermo Fisher XRF Product and Services

10.2.4 Thermo Fisher XRF Production, Price, Value, Gross Margin and Market Share  
(2021-2026)

10.2.5 Thermo Fisher Recent Developments/Updates

10.2.6 Thermo Fisher Competitive Strengths & Weaknesses

10.3 Bruker

10.3.1 Bruker Details

10.3.2 Bruker Major Business

10.3.3 Bruker XRF Product and Services

10.3.4 Bruker XRF Production, Price, Value, Gross Margin and Market Share  
(2021-2026)

10.3.5 Bruker Recent Developments/Updates

10.3.6 Bruker Competitive Strengths & Weaknesses

10.4 Rigaku

10.4.1 Rigaku Details

10.4.2 Rigaku Major Business

10.4.3 Rigaku XRF Product and Services

10.4.4 Rigaku XRF Production, Price, Value, Gross Margin and Market Share  
(2021-2026)

10.4.5 Rigaku Recent Developments/Updates

10.4.6 Rigaku Competitive Strengths & Weaknesses

10.5 Shimadzu

10.5.1 Shimadzu Details

10.5.2 Shimadzu Major Business

10.5.3 Shimadzu XRF Product and Services

10.5.4 Shimadzu XRF Production, Price, Value, Gross Margin and Market Share  
(2021-2026)

10.5.5 Shimadzu Recent Developments/Updates

10.5.6 Shimadzu Competitive Strengths & Weaknesses

10.6 Evident Corporation

10.6.1 Evident Corporation Details

10.6.2 Evident Corporation Major Business

- 10.6.3 Evident Corporation XRF Product and Services
- 10.6.4 Evident Corporation XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.6.5 Evident Corporation Recent Developments/Updates
- 10.6.6 Evident Corporation Competitive Strengths & Weaknesses
- 10.7 Skyray
  - 10.7.1 Skyray Details
  - 10.7.2 Skyray Major Business
  - 10.7.3 Skyray XRF Product and Services
  - 10.7.4 Skyray XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.7.5 Skyray Recent Developments/Updates
  - 10.7.6 Skyray Competitive Strengths & Weaknesses
- 10.8 HORIBA
  - 10.8.1 HORIBA Details
  - 10.8.2 HORIBA Major Business
  - 10.8.3 HORIBA XRF Product and Services
  - 10.8.4 HORIBA XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.8.5 HORIBA Recent Developments/Updates
  - 10.8.6 HORIBA Competitive Strengths & Weaknesses
- 10.9 Hitachi High-tech
  - 10.9.1 Hitachi High-tech Details
  - 10.9.2 Hitachi High-tech Major Business
  - 10.9.3 Hitachi High-tech XRF Product and Services
  - 10.9.4 Hitachi High-tech XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.9.5 Hitachi High-tech Recent Developments/Updates
  - 10.9.6 Hitachi High-tech Competitive Strengths & Weaknesses
- 10.10 Malvern Panalytical
  - 10.10.1 Malvern Panalytical Details
  - 10.10.2 Malvern Panalytical Major Business
  - 10.10.3 Malvern Panalytical XRF Product and Services
  - 10.10.4 Malvern Panalytical XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.10.5 Malvern Panalytical Recent Developments/Updates
  - 10.10.6 Malvern Panalytical Competitive Strengths & Weaknesses
- 10.11 Focused Photonics
  - 10.11.1 Focused Photonics Details

- 10.11.2 Focused Photonics Major Business
- 10.11.3 Focused Photonics XRF Product and Services
- 10.11.4 Focused Photonics XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.11.5 Focused Photonics Recent Developments/Updates
- 10.11.6 Focused Photonics Competitive Strengths & Weaknesses
- 10.12 BSI
  - 10.12.1 BSI Details
  - 10.12.2 BSI Major Business
  - 10.12.3 BSI XRF Product and Services
  - 10.12.4 BSI XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.12.5 BSI Recent Developments/Updates
  - 10.12.6 BSI Competitive Strengths & Weaknesses
- 10.13 Shanghai Jingpu Science & Technology
  - 10.13.1 Shanghai Jingpu Science & Technology Details
  - 10.13.2 Shanghai Jingpu Science & Technology Major Business
  - 10.13.3 Shanghai Jingpu Science & Technology XRF Product and Services
  - 10.13.4 Shanghai Jingpu Science & Technology XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.13.5 Shanghai Jingpu Science & Technology Recent Developments/Updates
  - 10.13.6 Shanghai Jingpu Science & Technology Competitive Strengths & Weaknesses
- 10.14 Suzhou LANScientific
  - 10.14.1 Suzhou LANScientific Details
  - 10.14.2 Suzhou LANScientific Major Business
  - 10.14.3 Suzhou LANScientific XRF Product and Services
  - 10.14.4 Suzhou LANScientific XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.14.5 Suzhou LANScientific Recent Developments/Updates
  - 10.14.6 Suzhou LANScientific Competitive Strengths & Weaknesses
- 10.15 X-Ray Optical Systems (XOS)
  - 10.15.1 X-Ray Optical Systems (XOS) Details
  - 10.15.2 X-Ray Optical Systems (XOS) Major Business
  - 10.15.3 X-Ray Optical Systems (XOS) XRF Product and Services
  - 10.15.4 X-Ray Optical Systems (XOS) XRF Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.15.5 X-Ray Optical Systems (XOS) Recent Developments/Updates
  - 10.15.6 X-Ray Optical Systems (XOS) Competitive Strengths & Weaknesses

## **11 INDUSTRY CHAIN ANALYSIS**

11.1 XRF Industry Chain

11.2 XRF Upstream Analysis

11.2.1 XRF Core Raw Materials

11.2.2 Main Manufacturers of XRF Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 XRF Production Mode

11.6 XRF Procurement Model

11.7 XRF Industry Sales Model and Sales Channels

11.7.1 XRF Sales Model

11.7.2 XRF Typical Distributors

## **12 RESEARCH FINDINGS AND CONCLUSION**

## **13 APPENDIX**

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World XRF Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World XRF Production Value by Region (2021-2026) & (USD Million)

Table 3. World XRF Production Value by Region (2027-2032) & (USD Million)

Table 4. World XRF Production Value Market Share by Region (2021-2026)

Table 5. World XRF Production Value Market Share by Region (2027-2032)

Table 6. World XRF Production by Region (2021-2026) & (Units)

Table 7. World XRF Production by Region (2027-2032) & (Units)

Table 8. World XRF Production Market Share by Region (2021-2026)

Table 9. World XRF Production Market Share by Region (2027-2032)

Table 10. World XRF Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World XRF Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. XRF Major Market Trends

Table 13. World XRF Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World XRF Consumption by Region (2021-2026) & (Units)

Table 15. World XRF Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World XRF Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key XRF Producers in 2025

Table 18. World XRF Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key XRF Producers in 2025

Table 20. World XRF Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global XRF Company Evaluation Quadrant

Table 22. World XRF Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and XRF Production Site of Key Manufacturer

Table 24. XRF Market: Company Product Type Footprint

Table 25. XRF Market: Company Product Application Footprint

Table 26. XRF Competitive Factors

Table 27. XRF New Entrant and Capacity Expansion Plans

Table 28. XRF Mergers & Acquisitions Activity

Table 29. United States VS China XRF Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China XRF Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China XRF Consumption Comparison, (2021 & 2025 &

2032) & (Units)

Table 32. United States Based XRF Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers XRF Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers XRF Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers XRF Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers XRF Production Market Share (2021-2026)

Table 37. China Based XRF Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers XRF Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers XRF Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers XRF Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers XRF Production Market Share (2021-2026)

Table 42. Rest of World Based XRF Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers XRF Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers XRF Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers XRF Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers XRF Production Market Share (2021-2026)

Table 47. World XRF Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World XRF Production by Type (2021-2026) & (Units)

Table 49. World XRF Production by Type (2027-2032) & (Units)

Table 50. World XRF Production Value by Type (2021-2026) & (USD Million)

Table 51. World XRF Production Value by Type (2027-2032) & (USD Million)

Table 52. World XRF Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World XRF Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World XRF Production Value by Shape, (USD Million), 2021 & 2025 & 2032

Table 55. World XRF Production by Shape (2021-2026) & (Units)

Table 56. World XRF Production by Shape (2027-2032) & (Units)

Table 57. World XRF Production Value by Shape (2021-2026) & (USD Million)

Table 58. World XRF Production Value by Shape (2027-2032) & (USD Million)

- Table 59. World XRF Average Price by Shape (2021-2026) & (K US\$/Unit)
- Table 60. World XRF Average Price by Shape (2027-2032) & (K US\$/Unit)
- Table 61. World XRF Production Value by Automation Level, (USD Million), 2021 & 2025 & 2032
- Table 62. World XRF Production by Automation Level (2021-2026) & (Units)
- Table 63. World XRF Production by Automation Level (2027-2032) & (Units)
- Table 64. World XRF Production Value by Automation Level (2021-2026) & (USD Million)
- Table 65. World XRF Production Value by Automation Level (2027-2032) & (USD Million)
- Table 66. World XRF Average Price by Automation Level (2021-2026) & (K US\$/Unit)
- Table 67. World XRF Average Price by Automation Level (2027-2032) & (K US\$/Unit)
- Table 68. World XRF Production Value by Throughput, (USD Million), 2021 & 2025 & 2032
- Table 69. World XRF Production by Throughput (2021-2026) & (Units)
- Table 70. World XRF Production by Throughput (2027-2032) & (Units)
- Table 71. World XRF Production Value by Throughput (2021-2026) & (USD Million)
- Table 72. World XRF Production Value by Throughput (2027-2032) & (USD Million)
- Table 73. World XRF Average Price by Throughput (2021-2026) & (K US\$/Unit)
- Table 74. World XRF Average Price by Throughput (2027-2032) & (K US\$/Unit)
- Table 75. World XRF Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 76. World XRF Production by Application (2021-2026) & (Units)
- Table 77. World XRF Production by Application (2027-2032) & (Units)
- Table 78. World XRF Production Value by Application (2021-2026) & (USD Million)
- Table 79. World XRF Production Value by Application (2027-2032) & (USD Million)
- Table 80. World XRF Average Price by Application (2021-2026) & (K US\$/Unit)
- Table 81. World XRF Average Price by Application (2027-2032) & (K US\$/Unit)
- Table 82. AMETEK Basic Information, Manufacturing Base and Competitors
- Table 83. AMETEK Major Business
- Table 84. AMETEK XRF Product and Services
- Table 85. AMETEK XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 86. AMETEK Recent Developments/Updates
- Table 87. AMETEK Competitive Strengths & Weaknesses
- Table 88. Thermo Fisher Basic Information, Manufacturing Base and Competitors
- Table 89. Thermo Fisher Major Business
- Table 90. Thermo Fisher XRF Product and Services
- Table 91. Thermo Fisher XRF Production (Units), Price (K US\$/Unit), Production Value

(USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Thermo Fisher Recent Developments/Updates

Table 93. Thermo Fisher Competitive Strengths & Weaknesses

Table 94. Bruker Basic Information, Manufacturing Base and Competitors

Table 95. Bruker Major Business

Table 96. Bruker XRF Product and Services

Table 97. Bruker XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Bruker Recent Developments/Updates

Table 99. Bruker Competitive Strengths & Weaknesses

Table 100. Rigaku Basic Information, Manufacturing Base and Competitors

Table 101. Rigaku Major Business

Table 102. Rigaku XRF Product and Services

Table 103. Rigaku XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Rigaku Recent Developments/Updates

Table 105. Rigaku Competitive Strengths & Weaknesses

Table 106. Shimadzu Basic Information, Manufacturing Base and Competitors

Table 107. Shimadzu Major Business

Table 108. Shimadzu XRF Product and Services

Table 109. Shimadzu XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Shimadzu Recent Developments/Updates

Table 111. Shimadzu Competitive Strengths & Weaknesses

Table 112. Evident Corporation Basic Information, Manufacturing Base and Competitors

Table 113. Evident Corporation Major Business

Table 114. Evident Corporation XRF Product and Services

Table 115. Evident Corporation XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Evident Corporation Recent Developments/Updates

Table 117. Evident Corporation Competitive Strengths & Weaknesses

Table 118. Skyray Basic Information, Manufacturing Base and Competitors

Table 119. Skyray Major Business

Table 120. Skyray XRF Product and Services

Table 121. Skyray XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Skyray Recent Developments/Updates

Table 123. Skyray Competitive Strengths & Weaknesses

Table 124. HORIBA Basic Information, Manufacturing Base and Competitors

- Table 125. HORIBA Major Business
- Table 126. HORIBA XRF Product and Services
- Table 127. HORIBA XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 128. HORIBA Recent Developments/Updates
- Table 129. HORIBA Competitive Strengths & Weaknesses
- Table 130. Hitachi High-tech Basic Information, Manufacturing Base and Competitors
- Table 131. Hitachi High-tech Major Business
- Table 132. Hitachi High-tech XRF Product and Services
- Table 133. Hitachi High-tech XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 134. Hitachi High-tech Recent Developments/Updates
- Table 135. Hitachi High-tech Competitive Strengths & Weaknesses
- Table 136. Malvern Panalytical Basic Information, Manufacturing Base and Competitors
- Table 137. Malvern Panalytical Major Business
- Table 138. Malvern Panalytical XRF Product and Services
- Table 139. Malvern Panalytical XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 140. Malvern Panalytical Recent Developments/Updates
- Table 141. Malvern Panalytical Competitive Strengths & Weaknesses
- Table 142. Focused Photonics Basic Information, Manufacturing Base and Competitors
- Table 143. Focused Photonics Major Business
- Table 144. Focused Photonics XRF Product and Services
- Table 145. Focused Photonics XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 146. Focused Photonics Recent Developments/Updates
- Table 147. Focused Photonics Competitive Strengths & Weaknesses
- Table 148. BSI Basic Information, Manufacturing Base and Competitors
- Table 149. BSI Major Business
- Table 150. BSI XRF Product and Services
- Table 151. BSI XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 152. BSI Recent Developments/Updates
- Table 153. BSI Competitive Strengths & Weaknesses
- Table 154. Shanghai Jingpu Science & Technology Basic Information, Manufacturing Base and Competitors
- Table 155. Shanghai Jingpu Science & Technology Major Business
- Table 156. Shanghai Jingpu Science & Technology XRF Product and Services
- Table 157. Shanghai Jingpu Science & Technology XRF Production (Units), Price (K

US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Shanghai Jingpu Science & Technology Recent Developments/Updates

Table 159. Shanghai Jingpu Science & Technology Competitive Strengths & Weaknesses

Table 160. Suzhou LANScientific Basic Information, Manufacturing Base and Competitors

Table 161. Suzhou LANScientific Major Business

Table 162. Suzhou LANScientific XRF Product and Services

Table 163. Suzhou LANScientific XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Suzhou LANScientific Recent Developments/Updates

Table 165. Suzhou LANScientific Competitive Strengths & Weaknesses

Table 166. X-Ray Optical Systems (XOS) Basic Information, Manufacturing Base and Competitors

Table 167. X-Ray Optical Systems (XOS) Major Business

Table 168. X-Ray Optical Systems (XOS) XRF Product and Services

Table 169. X-Ray Optical Systems (XOS) XRF Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. X-Ray Optical Systems (XOS) Recent Developments/Updates

Table 171. X-Ray Optical Systems (XOS) Competitive Strengths & Weaknesses

Table 172. Global Key Players of XRF Upstream (Raw Materials)

Table 173. Global XRF Typical Customers

Table 174. XRF Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. XRF Picture

Figure 2. World XRF Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World XRF Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World XRF Production (2021-2032) & (Units)

Figure 5. World XRF Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World XRF Production Value Market Share by Region (2021-2032)

Figure 7. World XRF Production Market Share by Region (2021-2032)

Figure 8. North America XRF Production (2021-2032) & (Units)

Figure 9. Europe XRF Production (2021-2032) & (Units)

Figure 10. China XRF Production (2021-2032) & (Units)

Figure 11. Japan XRF Production (2021-2032) & (Units)

Figure 12. XRF Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World XRF Consumption (2021-2032) & (Units)

Figure 15. World XRF Consumption Market Share by Region (2021-2032)

Figure 16. United States XRF Consumption (2021-2032) & (Units)

Figure 17. China XRF Consumption (2021-2032) & (Units)

Figure 18. Europe XRF Consumption (2021-2032) & (Units)

Figure 19. Japan XRF Consumption (2021-2032) & (Units)

Figure 20. South Korea XRF Consumption (2021-2032) & (Units)

Figure 21. ASEAN XRF Consumption (2021-2032) & (Units)

Figure 22. India XRF Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of XRF by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for XRF Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for XRF Markets in 2025

Figure 26. United States VS China: XRF Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: XRF Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: XRF Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers XRF Production Market Share 2025

Figure 30. China Based Manufacturers XRF Production Market Share 2025

Figure 31. Rest of World Based Manufacturers XRF Production Market Share 2025

- Figure 32. World XRF Production Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 33. World XRF Production Value Market Share by Type in 2025
- Figure 34. Energy Dispersive (EDXRF)
- Figure 35. Wavelength Dispersive (WDXRF)
- Figure 36. World XRF Production Market Share by Type (2021-2032)
- Figure 37. World XRF Production Value Market Share by Type (2021-2032)
- Figure 38. World XRF Average Price by Type (2021-2032) & (K US\$/Unit)
- Figure 39. World XRF Production Value by Shape, (USD Million), 2021 & 2025 & 2032
- Figure 40. World XRF Production Value Market Share by Shape in 2025
- Figure 41. Bench-top
- Figure 42. Portable
- Figure 43. Handheld
- Figure 44. World XRF Production Market Share by Shape (2021-2032)
- Figure 45. World XRF Production Value Market Share by Shape (2021-2032)
- Figure 46. World XRF Average Price by Shape (2021-2032) & (K US\$/Unit)
- Figure 47. World XRF Production Value by Automation Level, (USD Million), 2021 & 2025 & 2032
- Figure 48. World XRF Production Value Market Share by Automation Level in 2025
- Figure 49. Manual XRF Systems
- Figure 50. Semi-automated XRF Systems
- Figure 51. Fully Automated/ Inline XRF Systems
- Figure 52. World XRF Production Market Share by Automation Level (2021-2032)
- Figure 53. World XRF Production Value Market Share by Automation Level (2021-2032)
- Figure 54. World XRF Average Price by Automation Level (2021-2032) & (K US\$/Unit)
- Figure 55. World XRF Production Value by Throughput, (USD Million), 2021 & 2025 & 2032
- Figure 56. World XRF Production Value Market Share by Throughput in 2025
- Figure 57. Low-throughput XRF
- Figure 58. Medium-throughput XRF
- Figure 59. High-throughput XRF
- Figure 60. World XRF Production Market Share by Throughput (2021-2032)
- Figure 61. World XRF Production Value Market Share by Throughput (2021-2032)
- Figure 62. World XRF Average Price by Throughput (2021-2032) & (K US\$/Unit)
- Figure 63. World XRF Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 64. World XRF Production Value Market Share by Application in 2025
- Figure 65. Mining Industry
- Figure 66. Cement
- Figure 67. Food & Pharmaceutical

Figure 68. Environmental

Figure 69. Petroleum & Chemicals

Figure 70. Others

Figure 71. World XRF Production Market Share by Application (2021-2032)

Figure 72. World XRF Production Value Market Share by Application (2021-2032)

Figure 73. World XRF Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 74. XRF Industry Chain

Figure 75. XRF Procurement Model

Figure 76. XRF Sales Model

Figure 77. XRF Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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