

Global FTIR Exhaust Gas Analyzer Market Growth 2026-2032

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Abstracts

The global FTIR Exhaust Gas Analyzer market size is predicted to grow from US\$ 129 million in 2025 to US\$ 202 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

A Fourier Transform Infrared (FTIR) exhaust gas analyzer is a high-precision analytical instrument that utilizes broad-spectrum infrared radiation and mathematical Fourier transforms to simultaneously identify and quantify multiple gas components in a single sample. Unlike traditional non-dispersive infrared (NDIR) sensors that target specific gas wavelengths using filters, FTIR systems capture a complete 'molecular fingerprint' of the exhaust stream. This allows for the detection of a wide array of pollutants, including carbon monoxide (\$CO\$), nitrogen oxides (\$NO_x\$), methane (\$CH_4\$), and?crucially for 2026 regulatory compliance?ammonia (\$NH_3\$) and nitrous oxide (\$N_2O\$). The core of the system is the Michelson interferometer, which modulates the light to create an interferogram that is then decoded into a readable spectrum. In 2026, FTIR technology is the benchmark for 'Real Driving Emissions' (RDE) testing and Euro 7 compliance, offering the sensitivity needed to detect trace pollutants at parts-per-billion (ppb) levels while maintaining the high-speed response required for dynamic engine testing.

In 2025, global FTIR Exhaust Gas Analyzer production reached approximately 76.79 k units, with an average global market price of around US\$ 1719 per unit. And global FTIR Exhaust Gas Analyzer production capacity reached approximately 90 k units. The average gross margin in this industry reached 36.89%.

The upstream supply chain for FTIR exhaust gas analyzers is a specialized tier of the photonics and precision optics industry. The performance of the analyzer is dictated by

the quality of its optical 'engine,' which requires components capable of extreme stability under high-vibration automotive environments. Key upstream suppliers include Hamamatsu Photonics (supplying high-sensitivity InGaAs and MCT infrared detectors), MKS Instruments (providing ruggedized MultiGas[®] FTIR engines and integrated pressure/temperature controllers), and Thorlabs (delivering precision mirrors, beam splitters, and laser-stable interferometry components). As the market shifts toward portable PEMS-integrated FTIR in 2026, there is an increasing reliance on suppliers of Quantum Cascade Lasers (QCL) and high-speed FPGA-based processors that can handle the massive computational load of real-time Fourier transformation at the vehicle's edge.

The downstream segment involves the integration of these analyzers into vehicle certification labs, industrial stack monitoring systems, and mobile emissions testing rigs. Strategic value is realized here through the reduction of 'measurement uncertainty,' which is critical as 2026 regulations like Euro 7 remove the previous 'conformity factors' and demand absolute accuracy on the road. Major downstream customers and high-volume institutional users include Horiba and AVL List GmbH (who integrate FTIR cores into their global 'turnkey' emissions testing platforms), Toyota Motor Corporation and Stellantis (utilizing FTIR for RDE certification of new hybrid and hydrogen combustion powertrains), and ExxonMobil (employing FTIR for continuous emissions monitoring systems [CEMS] at large-scale refining and chemical processing facilities). In 2026, the market is seeing a surge in demand from the pharmaceutical and biotech sectors, where compact FTIR units are being repurposed for real-time gas analytics in sterile manufacturing environments.

LP Information, Inc. (LPI) ' newest research report, the 'FTIR Exhaust Gas Analyzer Industry Forecast' looks at past sales and reviews total world FTIR Exhaust Gas Analyzer sales in 2025, providing a comprehensive analysis by region and market sector of projected FTIR Exhaust Gas Analyzer sales for 2026 through 2032. With FTIR Exhaust Gas Analyzer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world FTIR Exhaust Gas Analyzer industry.

This Insight Report provides a comprehensive analysis of the global FTIR Exhaust Gas Analyzer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on FTIR Exhaust Gas Analyzer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position

in an accelerating global FTIR Exhaust Gas Analyzer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for FTIR Exhaust Gas Analyzer and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global FTIR Exhaust Gas Analyzer.

This report presents a comprehensive overview, market shares, and growth opportunities of FTIR Exhaust Gas Analyzer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dilute Measurement Type

Direct Measurement Type

Segmentation by System Type:

Fixed System

Portable Analyzer

Segmentation by Spectral Range:

Mid-IR

Near-IR

Others

Segmentation by Application:

Automotive

Chemical

Agriculture

Oil & Gas

Research And Development

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

HORIBA

MKS Instruments

ABB

Agilent

Gasmet Technologies

ARCOptix

Bruker

California Analytical Instruments

Cerex Monitoring Solutions

Envea

AVL

Thermo Fisher

Leshi Tech

ESE Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global FTIR Exhaust Gas Analyzer market?

What factors are driving FTIR Exhaust Gas Analyzer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do FTIR Exhaust Gas Analyzer market opportunities vary by end market size?

How does FTIR Exhaust Gas Analyzer break out by Type, by Application?

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