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Global Monitoring System for Volatile Organic Compounds in Water Market Growth 2026-2032

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Abstracts

The global Monitoring System for Volatile Organic Compounds in Water market size is predicted to grow from US$ 869 million in 2025 to US$ 1535 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

Monitoring System for Volatile Organic Compounds in Water refers to an automated environmental monitoring system designed to detect and quantify volatile organic compounds (VOCs) in various water environments through sampling, pretreatment, separation, analysis, and data transmission processes. The system typically integrates automatic sampling units, purge and trap modules, gas chromatography (GC), gas chromatography-mass spectrometry (GC-MS), optical detection components, sensors, control units, and communication platforms to achieve continuous or periodic monitoring of trace VOC pollutants such as benzene compounds, chlorinated hydrocarbons, and volatile solvents. This market primarily covers integrated water VOC monitoring equipment and related analytical systems used for surface water, groundwater, drinking water sources, industrial wastewater, and pollution remediation monitoring.

Key Findings

Global shipments reached approximately 18,500 units in 2025 with an average selling price of about US$48,000 per unit

The market is mainly driven by industrial wastewater monitoring and drinking water safety applications

Purge and Trap GC-MS systems represent the mainstream high-precision detection technology

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Online continuous monitoring systems are gaining importance in smart environmental management

Major suppliers include global analytical instrument companies and specialized environmental monitoring manufacturers

Market Trends

The water VOC monitoring system industry is moving toward higher automation, lower detection limits, multi-component analysis, and intelligent data management. Traditional laboratory-based GC-MS analysis is gradually expanding toward automated online monitoring solutions that enable continuous pollution tracking and early warning. The integration of cloud platforms, artificial intelligence algorithms, and remote operation capabilities is becoming an important development direction, allowing environmental agencies and industrial enterprises to improve monitoring efficiency and regulatory response speed. At the same time, demand for compact, low-maintenance, and field-deployable VOC monitoring systems is increasing due to the expansion of groundwater remediation projects, industrial park supervision, and decentralized water quality management.

Market Dynamics

Drivers

Increasing environmental regulations on industrial wastewater discharge, groundwater contamination control, and drinking water safety are major drivers for the adoption of water VOC monitoring systems. Growth in chemical manufacturing, petrochemical processing, electronics production, pharmaceutical manufacturing, and coating industries has increased the need for continuous monitoring of VOC pollutants. The development of smart environmental protection platforms and stricter requirements for automated pollution monitoring are further supporting market expansion.

Restraints

High equipment costs, complex maintenance requirements, and the need for skilled operators remain key limitations for wider adoption. Advanced GC-MS-based systems require regular calibration, consumable replacement, and technical maintenance, increasing the total cost of ownership. In some emerging markets, limited environmental

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monitoring budgets and insufficient technical capabilities may restrict deployment of high-end monitoring systems.

Opportunities

Future opportunities are concentrated in online real-time monitoring, miniaturized analytical instruments, AI-assisted pollution identification, and integrated water quality management platforms. The replacement of traditional manual sampling methods with automated monitoring networks provides significant opportunities for equipment suppliers. Growing groundwater remediation projects, industrial park environmental supervision, and stricter drinking water protection standards are expected to create additional demand.

Challenges

The industry faces challenges related to improving long-term instrument stability, reducing detection costs, and achieving standardized data integration across different monitoring platforms. Suppliers also need to address technical challenges in complex water matrices, where interference from multiple pollutants may affect detection accuracy and system reliability.

Industry Chain Analysis

The upstream industry consists of analytical components, electronic components, precision mechanical parts, sensors, pumps, valves, sampling pipelines, communication modules, and structural materials. Key components such as GC-MS modules, detectors, control chips, and precision sampling systems determine the performance and cost structure of the final product. The midstream sector includes environmental monitoring equipment manufacturers, analytical instrument companies, and system integrators that complete instrument development, integration, calibration, and environmental adaptability testing. The downstream market includes environmental agencies, water utilities, industrial enterprises, research institutions, and pollution remediation companies. Value creation mainly comes from analytical accuracy, automation capability, software intelligence, and long-term monitoring reliability.

Segment Insights

By technology, Purge and Trap-GC/MS systems represent the mainstream segment due to their high sensitivity, multi-component identification capability, and established application base in environmental monitoring. Headspace-GC/MS systems are widely

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used where simplified sample preparation is required, while online mass spectrometry and sensor-based solutions are developing rapidly for real-time monitoring scenarios. By monitoring mode, laboratory offline systems remain important for regulatory testing, while online continuous monitoring systems are becoming increasingly attractive for industrial wastewater and water source protection applications.

Downstream Market Opportunities

Industrial wastewater monitoring represents one of the most important application opportunities, particularly in petrochemical, chemical, pharmaceutical, electronics, and coating industries where VOC contamination risks are significant. Drinking water source protection, groundwater remediation, and smart water management platforms are also creating new demand for automated VOC monitoring solutions. Future opportunities will focus on integrated environmental monitoring networks that combine VOC analysis with broader water quality parameters.

Regional Insights

North America and Europe maintain strong demand due to strict environmental regulations, advanced monitoring infrastructure, and mature analytical instrument industries. China represents one of the fastest-growing markets driven by industrial pollution control, water environment improvement programs, and increasing investment in smart environmental monitoring systems. Japan and South Korea continue to maintain demand from advanced manufacturing and environmental technology sectors, while Southeast Asia is expected to experience increasing adoption as industrialization and environmental management requirements develop.

Competitive Landscape Analysis

The competitive landscape combines global analytical instrument leaders and specialized environmental monitoring companies. International companies such as Agilent Technologies, Shimadzu, Thermo Fisher Scientific, PerkinElmer, Bruker, HORIBA, INFICON, and Teledyne benefit from advanced analytical technologies and established laboratory instrument channels. Chinese companies including Guangzhou Hexin Instrument, Beijing BCT Technology, Focused Photonics, Beijing SDL Technology, BESCIENT Technologies, and China Huadian-related environmental technology businesses are strengthening their positions through localized solutions, online monitoring platforms, and environmental project experience. Competition is increasingly focused on detection accuracy, automation capability, software integration,

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service networks, and cost-effective deployment.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Monitoring System for Volatile Organic Compounds in Water Industry Forecast” looks at past sales and reviews total world Monitoring System for Volatile Organic Compounds in Water sales in 2025, providing a comprehensive analysis by region and market sector of projected Monitoring System for Volatile Organic Compounds in Water sales for 2026 through 2032. With Monitoring System for Volatile Organic Compounds in Water sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Monitoring System for Volatile Organic Compounds in Water industry.

This Insight Report provides a comprehensive analysis of the global Monitoring System for Volatile Organic Compounds in Water 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 Monitoring System for Volatile Organic Compounds in Water portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Monitoring System for Volatile Organic Compounds in Water market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Monitoring System for Volatile Organic Compounds in Water 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 Monitoring System for Volatile Organic Compounds in Water.

This report presents a comprehensive overview, market shares, and growth opportunities of Monitoring System for Volatile Organic Compounds in Water market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

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Purge and Trap - GC/MS Type

Headspace - GC/MS Type

Online Mass Spectrometry Type

Spectrometer/Sensor Type

Segmentation by Detection Method:

Laboratory Offline Testing System

Semi-automatic Sampling and Analysis System

Online Continuous Monitoring System

Mobile Monitoring System

Segmentation by Detection Target:

Benzene Series Compound Monitoring System

Chlorinated Volatile Compound Monitoring System

Halogenated Hydrocarbon Monitoring System

VOCs Comprehensive Screening System

Segmentation by Application:

Industrial Wastewater Monitoring

Drinking Water Source Monitoring

Groundwater Pollution Monitoring

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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

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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.

Agilent Technologies

Shimadzu

INFICON

PerkinElmer

China Huadian Corporation

Guangzhou Hexin Instrument

Beijing BCT Technology

Teledyne

HORIBA

Bruker

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BESCIENT TECHNOLOGIES

Focused Photonics

Beijing SDL Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Monitoring System for Volatile Organic Compounds in Water market?

What factors are driving Monitoring System for Volatile Organic Compounds in Water market growth, globally and by region?

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

How do Monitoring System for Volatile Organic Compounds in Water market opportunities vary by end market size?

How does Monitoring System for Volatile Organic Compounds in Water break out by Type, by Application?

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