

# Global Multi-Parameter Water Quality Sondes Market Growth 2026-2032

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## Abstracts

The global Multi-Parameter Water Quality Sondes market size is predicted to grow from US\$ 174 million in 2025 to US\$ 274 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

In 2024, the global market for multi-parameter water quality sondes saw sales of approximately 54,000 units, with a typical average price of around USD 3,100 per unit and an industry average gross margin of approximately 30%–34%. These devices can simultaneously record multiple water quality parameters (such as pH, dissolved oxygen (DO), conductivity, temperature, turbidity, oxidation-reduction potential (ORP), etc.). Common parameters typically include: measurement range (pH 0–14, DO 0–20 mg/L, temperature –5–+50 °C, etc.), sampling frequency (configurable from once per second to once per hour), memory capacity (thousands to tens of thousands of data points), communication method (USB, SD card, Bluetooth, or 4–20 mA / Modbus), power supply type (battery or external power), and protection rating (IP65–IP68). Typical examples include the Horiba U-52G multi-parameter logger/meter and the Onset HOBO MX800 multi-parameter Bluetooth data logger. In terms of upstream and downstream supply chains, upstream components include sensor elements (pH electrodes, dissolved oxygen membranes, conductive probes), microcontrollers/data acquisition chips, memory components, batteries/power modules, housings, and communication modules; typical suppliers may include Sensirion, TI, STMicroelectronics, Sony Memory, and TE Connectivity. Downstream customers include urban water departments, environmental monitoring stations, research institutions, industrial wastewater treatment plants, and aquaculture/fisheries monitoring companies. Horiba, based on its business in U-50/U-52 series handheld & field instruments, analytical instruments (such as the W-series online analyzers), and its environmental/water quality analysis business structure, has an annual multiparameter recorder production capacity of approximately 4,000–6,000 units

per year.

The market development trend of multi-parameter water quality sondes is shifting from spot-check and portable detection to online, intelligent, and networked continuous monitoring systems. Driven by water scarcity, stricter wastewater discharge regulations, and the demand for digital management in cities and industries, the need for real-time data on multiple parameters such as pH, dissolved oxygen, conductivity, turbidity, and temperature is rapidly increasing in municipal water supply and drainage, industrial wastewater, marine monitoring, and agriculture/aquaculture. This makes online/remote data recording and cloud analysis core factors in procurement decisions. Technological advancements include low-power IoT communication modules, optical/membrane-free dissolved oxygen and anti-fouling sensors, automatic calibration/self-diagnostic algorithms, and edge computing and cloud-based big data analysis/AI anomaly detection, enabling long-cycle, low-maintenance deployments. Simultaneously, multi-parameter probes are evolving towards modularity, replaceable probes, and unified digital interfaces (Modbus/LoRa/4G/5G), facilitating integration with smart water and environmental monitoring platforms. Regionally, North America and Europe are primarily driven by regulatory compliance and the upgrading of aging infrastructure, while Asia Pacific and Latin America are experiencing the fastest growth (infrastructure expansion + accelerated industrialization). This reflects the continued shift from portable/laboratory-grade systems to online/networked systems. Challenges to note include sensor drift and maintenance (on-site calibration costs), data quality and interoperability issues, and the transformation of business models for equipment and sensing services from one-time sales to 'equipment + sensor + data subscription,' prompting manufacturers to invest more in product design, after-sales service, and cloud platform capabilities to maintain long-term revenue and customer loyalty.

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

This Insight Report provides a comprehensive analysis of the global Multi-Parameter Water Quality Sondes 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 Multi-Parameter Water Quality Sondes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Multi-Parameter Water Quality Sondes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Multi-Parameter Water Quality Sondes 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 Multi-Parameter Water Quality Sondes.

This report presents a comprehensive overview, market shares, and growth opportunities of Multi-Parameter Water Quality Sondes market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Potable Type

Benchtop Type

#### Segmentation by Protection Level:

IP65

IP66

IP67

IP68

#### Segmentation by Power Type:

Battery

## External Power Supply

### Segmentation by Application:

Industrial

Laboratory

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.

Xylem

LI-COR

Hach

Hanna Instruments

Thermo Fisher Scientific

Horiba

Palintest

Jenco Instruments

In-Situ

Oakton

DKK-TOA

Aqualabo

Bante

OHAUS

RS Hydro

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Multi-Parameter Water Quality Sondes market?

What factors are driving Multi-Parameter Water Quality Sondes market growth, globally and by region?

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

How do Multi-Parameter Water Quality Sondes market opportunities vary by end market size?

How does Multi-Parameter Water Quality Sondes break out by Type, by Application?

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