

Global XRF Market Growth 2026-2032

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Abstracts

The global XRF market size is predicted to grow from US\$ 897 million in 2025 to US\$ 1368 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for XRF 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 XRF.

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

Segmentation by Type:

Energy Dispersive (EDXRF)

Wavelength Dispersive (WDXRF)

Segmentation by Shape:

Bench-top

Portable

Handheld

Segmentation by Automation Level:

Manual XRF Systems

Semi-automated XRF Systems

Fully Automated/ Inline XRF Systems

Segmentation by Throughput:

Low-throughput XRF

Medium-throughput XRF

High-throughput XRF

Segmentation by Application:

Mining Industry

Cement

Food & Pharmaceutical

Environmental

Petroleum & Chemicals

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.

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 Addressed in this Report

What is the 10-year outlook for the global XRF market?

What factors are driving XRF market growth, globally and by region?

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

How do XRF market opportunities vary by end market size?

How does XRF break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global XRF Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for XRF by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for XRF by Country/Region, 2021, 2025 & 2032
- 2.2 XRF Segment by Type
 - 2.2.1 Energy Dispersive (EDXRF)
 - 2.2.2 Wavelength Dispersive (WDXRF)
 - 2.2.3 XRF Sales by Type
 - 2.2.3.1 Global XRF Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global XRF Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global XRF Sale Price by Type (2021-2026)
- 2.3 XRF Segment by Shape
 - 2.3.1 Bench-top
 - 2.3.2 Portable
 - 2.3.3 Handheld
 - 2.3.4 XRF Sales by Shape
 - 2.3.4.1 Global XRF Sales Market Share by Shape (2021-2026)
 - 2.3.4.2 Global XRF Revenue and Market Share by Shape (2021-2026)
 - 2.3.4.3 Global XRF Sale Price by Shape (2021-2026)
- 2.4 XRF Segment by Automation Level
 - 2.4.1 Manual XRF Systems
 - 2.4.2 Semi-automated XRF Systems
 - 2.4.3 Fully Automated/ Inline XRF Systems

2.4.4 XRF Sales by Automation Level

2.4.4.1 Global XRF Sales Market Share by Automation Level (2021-2026)

2.4.4.2 Global XRF Revenue and Market Share by Automation Level (2021-2026)

2.4.4.3 Global XRF Sale Price by Automation Level (2021-2026)

2.5 XRF Segment by Throughput

2.5.1 Low-throughput XRF

2.5.2 Medium-throughput XRF

2.5.3 High-throughput XRF

2.5.4 XRF Sales by Throughput

2.5.4.1 Global XRF Sales Market Share by Throughput (2021-2026)

2.5.4.2 Global XRF Revenue and Market Share by Throughput (2021-2026)

2.5.4.3 Global XRF Sale Price by Throughput (2021-2026)

2.6 XRF Segment by Application

2.6.1 Mining Industry

2.6.2 Cement

2.6.3 Food & Pharmaceutical

2.6.4 Environmental

2.6.5 Petroleum & Chemicals

2.6.6 Others

2.6.7 XRF Sales by Application

2.6.7.1 Global XRF Sale Market Share by Application (2021-2026)

2.6.7.2 Global XRF Revenue and Market Share by Application (2021-2026)

2.6.7.3 Global XRF Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global XRF Breakdown Data by Company

3.1.1 Global XRF Annual Sales by Company (2021-2026)

3.1.2 Global XRF Sales Market Share by Company (2021-2026)

3.2 Global XRF Annual Revenue by Company (2021-2026)

3.2.1 Global XRF Revenue by Company (2021-2026)

3.2.2 Global XRF Revenue Market Share by Company (2021-2026)

3.3 Global XRF Sale Price by Company

3.4 Key Manufacturers XRF Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers XRF Product Location Distribution

3.4.2 Players XRF Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR XRF BY GEOGRAPHIC REGION

4.1 World Historic XRF Market Size by Geographic Region (2021-2026)

4.1.1 Global XRF Annual Sales by Geographic Region (2021-2026)

4.1.2 Global XRF Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic XRF Market Size by Country/Region (2021-2026)

4.2.1 Global XRF Annual Sales by Country/Region (2021-2026)

4.2.2 Global XRF Annual Revenue by Country/Region (2021-2026)

4.3 Americas XRF Sales Growth

4.4 APAC XRF Sales Growth

4.5 Europe XRF Sales Growth

4.6 Middle East & Africa XRF Sales Growth

5 AMERICAS

5.1 Americas XRF Sales by Country

5.1.1 Americas XRF Sales by Country (2021-2026)

5.1.2 Americas XRF Revenue by Country (2021-2026)

5.2 Americas XRF Sales by Type (2021-2026)

5.3 Americas XRF Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC XRF Sales by Region

6.1.1 APAC XRF Sales by Region (2021-2026)

6.1.2 APAC XRF Revenue by Region (2021-2026)

6.2 APAC XRF Sales by Type (2021-2026)

6.3 APAC XRF Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe XRF by Country
 - 7.1.1 Europe XRF Sales by Country (2021-2026)
 - 7.1.2 Europe XRF Revenue by Country (2021-2026)
- 7.2 Europe XRF Sales by Type (2021-2026)
- 7.3 Europe XRF Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa XRF by Country
 - 8.1.1 Middle East & Africa XRF Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa XRF Revenue by Country (2021-2026)
- 8.2 Middle East & Africa XRF Sales by Type (2021-2026)
- 8.3 Middle East & Africa XRF Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of XRF

10.3 Manufacturing Process Analysis of XRF

10.4 Industry Chain Structure of XRF

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 XRF Distributors

11.3 XRF Customer

12 WORLD FORECAST REVIEW FOR XRF BY GEOGRAPHIC REGION

12.1 Global XRF Market Size Forecast by Region

12.1.1 Global XRF Forecast by Region (2027-2032)

12.1.2 Global XRF Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global XRF Forecast by Type (2027-2032)

12.7 Global XRF Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 AMETEK

13.1.1 AMETEK Company Information

13.1.2 AMETEK XRF Product Portfolios and Specifications

13.1.3 AMETEK XRF Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 AMETEK Main Business Overview

13.1.5 AMETEK Latest Developments

13.2 Thermo Fisher

13.2.1 Thermo Fisher Company Information

13.2.2 Thermo Fisher XRF Product Portfolios and Specifications

13.2.3 Thermo Fisher XRF Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Thermo Fisher Main Business Overview

13.2.5 Thermo Fisher Latest Developments

13.3 Bruker

- 13.3.1 Bruker Company Information
- 13.3.2 Bruker XRF Product Portfolios and Specifications
- 13.3.3 Bruker XRF Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 Bruker Main Business Overview
- 13.3.5 Bruker Latest Developments
- 13.4 Rigaku
 - 13.4.1 Rigaku Company Information
 - 13.4.2 Rigaku XRF Product Portfolios and Specifications
 - 13.4.3 Rigaku XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Rigaku Main Business Overview
 - 13.4.5 Rigaku Latest Developments
- 13.5 Shimadzu
 - 13.5.1 Shimadzu Company Information
 - 13.5.2 Shimadzu XRF Product Portfolios and Specifications
 - 13.5.3 Shimadzu XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Shimadzu Main Business Overview
 - 13.5.5 Shimadzu Latest Developments
- 13.6 Evident Corporation
 - 13.6.1 Evident Corporation Company Information
 - 13.6.2 Evident Corporation XRF Product Portfolios and Specifications
 - 13.6.3 Evident Corporation XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Evident Corporation Main Business Overview
 - 13.6.5 Evident Corporation Latest Developments
- 13.7 Skyray
 - 13.7.1 Skyray Company Information
 - 13.7.2 Skyray XRF Product Portfolios and Specifications
 - 13.7.3 Skyray XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Skyray Main Business Overview
 - 13.7.5 Skyray Latest Developments
- 13.8 HORIBA
 - 13.8.1 HORIBA Company Information
 - 13.8.2 HORIBA XRF Product Portfolios and Specifications
 - 13.8.3 HORIBA XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 HORIBA Main Business Overview
 - 13.8.5 HORIBA Latest Developments
- 13.9 Hitachi High-tech
 - 13.9.1 Hitachi High-tech Company Information
 - 13.9.2 Hitachi High-tech XRF Product Portfolios and Specifications
 - 13.9.3 Hitachi High-tech XRF Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.9.4 Hitachi High-tech Main Business Overview
- 13.9.5 Hitachi High-tech Latest Developments
- 13.10 Malvern Panalytical
 - 13.10.1 Malvern Panalytical Company Information
 - 13.10.2 Malvern Panalytical XRF Product Portfolios and Specifications
 - 13.10.3 Malvern Panalytical XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Malvern Panalytical Main Business Overview
 - 13.10.5 Malvern Panalytical Latest Developments
- 13.11 Focused Photonics
 - 13.11.1 Focused Photonics Company Information
 - 13.11.2 Focused Photonics XRF Product Portfolios and Specifications
 - 13.11.3 Focused Photonics XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Focused Photonics Main Business Overview
 - 13.11.5 Focused Photonics Latest Developments
- 13.12 BSI
 - 13.12.1 BSI Company Information
 - 13.12.2 BSI XRF Product Portfolios and Specifications
 - 13.12.3 BSI XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 BSI Main Business Overview
 - 13.12.5 BSI Latest Developments
- 13.13 Shanghai Jingpu Science & Technology
 - 13.13.1 Shanghai Jingpu Science & Technology Company Information
 - 13.13.2 Shanghai Jingpu Science & Technology XRF Product Portfolios and Specifications
 - 13.13.3 Shanghai Jingpu Science & Technology XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Shanghai Jingpu Science & Technology Main Business Overview
 - 13.13.5 Shanghai Jingpu Science & Technology Latest Developments
- 13.14 Suzhou LANScientific
 - 13.14.1 Suzhou LANScientific Company Information
 - 13.14.2 Suzhou LANScientific XRF Product Portfolios and Specifications
 - 13.14.3 Suzhou LANScientific XRF Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Suzhou LANScientific Main Business Overview
 - 13.14.5 Suzhou LANScientific Latest Developments
- 13.15 X-Ray Optical Systems (XOS)
 - 13.15.1 X-Ray Optical Systems (XOS) Company Information

- 13.15.2 X-Ray Optical Systems (XOS) XRF Product Portfolios and Specifications
- 13.15.3 X-Ray Optical Systems (XOS) XRF Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.15.4 X-Ray Optical Systems (XOS) Main Business Overview
- 13.15.5 X-Ray Optical Systems (XOS) Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. XRF Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. XRF Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Energy Dispersive (EDXRF)

Table 4. Major Players of Wavelength Dispersive (WDXRF)

Table 5. Global XRF Sales by Type (2021-2026) & (Units)

Table 6. Global XRF Sales Market Share by Type (2021-2026)

Table 7. Global XRF Revenue by Type (2021-2026) & (\$ million)

Table 8. Global XRF Revenue Market Share by Type (2021-2026)

Table 9. Global XRF Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 10. Major Players of Bench-top

Table 11. Major Players of Portable

Table 12. Major Players of Handheld

Table 13. Global XRF Sales by Shape (2021-2026) & (Units)

Table 14. Global XRF Sales Market Share by Shape (2021-2026)

Table 15. Global XRF Revenue by Shape (2021-2026) & (\$ million)

Table 16. Global XRF Revenue Market Share by Shape (2021-2026)

Table 17. Global XRF Sale Price by Shape (2021-2026) & (K US\$/Unit)

Table 18. Major Players of Manual XRF Systems

Table 19. Major Players of Semi-automated XRF Systems

Table 20. Major Players of Fully Automated/ Inline XRF Systems

Table 21. Global XRF Sales by Automation Level (2021-2026) & (Units)

Table 22. Global XRF Sales Market Share by Automation Level (2021-2026)

Table 23. Global XRF Revenue by Automation Level (2021-2026) & (\$ million)

Table 24. Global XRF Revenue Market Share by Automation Level (2021-2026)

Table 25. Global XRF Sale Price by Automation Level (2021-2026) & (K US\$/Unit)

Table 26. Major Players of Low-throughput XRF

Table 27. Major Players of Medium-throughput XRF

Table 28. Major Players of High-throughput XRF

Table 29. Global XRF Sales by Throughput (2021-2026) & (Units)

Table 30. Global XRF Sales Market Share by Throughput (2021-2026)

Table 31. Global XRF Revenue by Throughput (2021-2026) & (\$ million)

Table 32. Global XRF Revenue Market Share by Throughput (2021-2026)

Table 33. Global XRF Sale Price by Throughput (2021-2026) & (K US\$/Unit)

Table 34. Global XRF Sale by Application (2021-2026) & (Units)
Table 35. Global XRF Sale Market Share by Application (2021-2026)
Table 36. Global XRF Revenue by Application (2021-2026) & (\$ million)
Table 37. Global XRF Revenue Market Share by Application (2021-2026)
Table 38. Global XRF Sale Price by Application (2021-2026) & (K US\$/Unit)
Table 39. Global XRF Sales by Company (2021-2026) & (Units)
Table 40. Global XRF Sales Market Share by Company (2021-2026)
Table 41. Global XRF Revenue by Company (2021-2026) & (\$ millions)
Table 42. Global XRF Revenue Market Share by Company (2021-2026)
Table 43. Global XRF Sale Price by Company (2021-2026) & (K US\$/Unit)
Table 44. Key Manufacturers XRF Producing Area Distribution and Sales Area
Table 45. Players XRF Products Offered
Table 46. XRF Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 47. New Products and Potential Entrants
Table 48. Market M&A Activity & Strategy
Table 49. Global XRF Sales by Geographic Region (2021-2026) & (Units)
Table 50. Global XRF Sales Market Share Geographic Region (2021-2026)
Table 51. Global XRF Revenue by Geographic Region (2021-2026) & (\$ millions)
Table 52. Global XRF Revenue Market Share by Geographic Region (2021-2026)
Table 53. Global XRF Sales by Country/Region (2021-2026) & (Units)
Table 54. Global XRF Sales Market Share by Country/Region (2021-2026)
Table 55. Global XRF Revenue by Country/Region (2021-2026) & (\$ millions)
Table 56. Global XRF Revenue Market Share by Country/Region (2021-2026)
Table 57. Americas XRF Sales by Country (2021-2026) & (Units)
Table 58. Americas XRF Sales Market Share by Country (2021-2026)
Table 59. Americas XRF Revenue by Country (2021-2026) & (\$ millions)
Table 60. Americas XRF Sales by Type (2021-2026) & (Units)
Table 61. Americas XRF Sales by Application (2021-2026) & (Units)
Table 62. APAC XRF Sales by Region (2021-2026) & (Units)
Table 63. APAC XRF Sales Market Share by Region (2021-2026)
Table 64. APAC XRF Revenue by Region (2021-2026) & (\$ millions)
Table 65. APAC XRF Sales by Type (2021-2026) & (Units)
Table 66. APAC XRF Sales by Application (2021-2026) & (Units)
Table 67. Europe XRF Sales by Country (2021-2026) & (Units)
Table 68. Europe XRF Revenue by Country (2021-2026) & (\$ millions)
Table 69. Europe XRF Sales by Type (2021-2026) & (Units)
Table 70. Europe XRF Sales by Application (2021-2026) & (Units)
Table 71. Middle East & Africa XRF Sales by Country (2021-2026) & (Units)
Table 72. Middle East & Africa XRF Revenue Market Share by Country (2021-2026)

Table 73. Middle East & Africa XRF Sales by Type (2021-2026) & (Units)
Table 74. Middle East & Africa XRF Sales by Application (2021-2026) & (Units)
Table 75. Key Market Drivers & Growth Opportunities of XRF
Table 76. Key Market Challenges & Risks of XRF
Table 77. Key Industry Trends of XRF
Table 78. XRF Raw Material
Table 79. Key Suppliers of Raw Materials
Table 80. XRF Distributors List
Table 81. XRF Customer List
Table 82. Global XRF Sales Forecast by Region (2027-2032) & (Units)
Table 83. Global XRF Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 84. Americas XRF Sales Forecast by Country (2027-2032) & (Units)
Table 85. Americas XRF Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 86. APAC XRF Sales Forecast by Region (2027-2032) & (Units)
Table 87. APAC XRF Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 88. Europe XRF Sales Forecast by Country (2027-2032) & (Units)
Table 89. Europe XRF Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 90. Middle East & Africa XRF Sales Forecast by Country (2027-2032) & (Units)
Table 91. Middle East & Africa XRF Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 92. Global XRF Sales Forecast by Type (2027-2032) & (Units)
Table 93. Global XRF Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 94. Global XRF Sales Forecast by Application (2027-2032) & (Units)
Table 95. Global XRF Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 96. AMETEK Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors
Table 97. AMETEK XRF Product Portfolios and Specifications
Table 98. AMETEK XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 99. AMETEK Main Business
Table 100. AMETEK Latest Developments
Table 101. Thermo Fisher Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors
Table 102. Thermo Fisher XRF Product Portfolios and Specifications
Table 103. Thermo Fisher XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 104. Thermo Fisher Main Business
Table 105. Thermo Fisher Latest Developments

Table 106. Bruker Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 107. Bruker XRF Product Portfolios and Specifications

Table 108. Bruker XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 109. Bruker Main Business

Table 110. Bruker Latest Developments

Table 111. Rigaku Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 112. Rigaku XRF Product Portfolios and Specifications

Table 113. Rigaku XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 114. Rigaku Main Business

Table 115. Rigaku Latest Developments

Table 116. Shimadzu Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 117. Shimadzu XRF Product Portfolios and Specifications

Table 118. Shimadzu XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 119. Shimadzu Main Business

Table 120. Shimadzu Latest Developments

Table 121. Evident Corporation Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 122. Evident Corporation XRF Product Portfolios and Specifications

Table 123. Evident Corporation XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 124. Evident Corporation Main Business

Table 125. Evident Corporation Latest Developments

Table 126. Skyray Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 127. Skyray XRF Product Portfolios and Specifications

Table 128. Skyray XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 129. Skyray Main Business

Table 130. Skyray Latest Developments

Table 131. HORIBA Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 132. HORIBA XRF Product Portfolios and Specifications

Table 133. HORIBA XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and

Gross Margin (2021-2026)

Table 134. HORIBA Main Business

Table 135. HORIBA Latest Developments

Table 136. Hitachi High-tech Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 137. Hitachi High-tech XRF Product Portfolios and Specifications

Table 138. Hitachi High-tech XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 139. Hitachi High-tech Main Business

Table 140. Hitachi High-tech Latest Developments

Table 141. Malvern Panalytical Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 142. Malvern Panalytical XRF Product Portfolios and Specifications

Table 143. Malvern Panalytical XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 144. Malvern Panalytical Main Business

Table 145. Malvern Panalytical Latest Developments

Table 146. Focused Photonics Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 147. Focused Photonics XRF Product Portfolios and Specifications

Table 148. Focused Photonics XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 149. Focused Photonics Main Business

Table 150. Focused Photonics Latest Developments

Table 151. BSI Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 152. BSI XRF Product Portfolios and Specifications

Table 153. BSI XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 154. BSI Main Business

Table 155. BSI Latest Developments

Table 156. Shanghai Jingpu Science & Technology Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 157. Shanghai Jingpu Science & Technology XRF Product Portfolios and Specifications

Table 158. Shanghai Jingpu Science & Technology XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 159. Shanghai Jingpu Science & Technology Main Business

Table 160. Shanghai Jingpu Science & Technology Latest Developments

Table 161. Suzhou LANScientific Basic Information, XRF Manufacturing Base, Sales Area and Its Competitors

Table 162. Suzhou LANScientific XRF Product Portfolios and Specifications

Table 163. Suzhou LANScientific XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 164. Suzhou LANScientific Main Business

Table 165. Suzhou LANScientific Latest Developments

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

Table 167. X-Ray Optical Systems (XOS) XRF Product Portfolios and Specifications

Table 168. X-Ray Optical Systems (XOS) XRF Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 169. X-Ray Optical Systems (XOS) Main Business

Table 170. X-Ray Optical Systems (XOS) Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of XRF
- Figure 2. XRF Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global XRF Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global XRF Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. XRF Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. XRF Sales Market Share by Country/Region (2025)
- Figure 10. XRF Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Energy Dispersive (EDXRF)
- Figure 12. Product Picture of Wavelength Dispersive (WDXRF)
- Figure 13. Global XRF Sales Market Share by Type in 2026
- Figure 14. Global XRF Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Bench-top
- Figure 16. Product Picture of Portable
- Figure 17. Product Picture of Handheld
- Figure 18. Global XRF Sales Market Share by Shape in 2026
- Figure 19. Global XRF Revenue Market Share by Shape (2021-2026)
- Figure 20. Product Picture of Manual XRF Systems
- Figure 21. Product Picture of Semi-automated XRF Systems
- Figure 22. Product Picture of Fully Automated/ Inline XRF Systems
- Figure 23. Global XRF Sales Market Share by Automation Level in 2026
- Figure 24. Global XRF Revenue Market Share by Automation Level (2021-2026)
- Figure 25. Product Picture of Low-throughput XRF
- Figure 26. Product Picture of Medium-throughput XRF
- Figure 27. Product Picture of High-throughput XRF
- Figure 28. Global XRF Sales Market Share by Throughput in 2026
- Figure 29. Global XRF Revenue Market Share by Throughput (2021-2026)
- Figure 30. XRF Consumed in Mining Industry
- Figure 31. Global XRF Market: Mining Industry (2021-2026) & (Units)
- Figure 32. XRF Consumed in Cement
- Figure 33. Global XRF Market: Cement (2021-2026) & (Units)
- Figure 34. XRF Consumed in Food & Pharmaceutical
- Figure 35. Global XRF Market: Food & Pharmaceutical (2021-2026) & (Units)

- Figure 36. XRF Consumed in Environmental
- Figure 37. Global XRF Market: Environmental (2021-2026) & (Units)
- Figure 38. XRF Consumed in Petroleum & Chemicals
- Figure 39. Global XRF Market: Petroleum & Chemicals (2021-2026) & (Units)
- Figure 40. XRF Consumed in Others
- Figure 41. Global XRF Market: Others (2021-2026) & (Units)
- Figure 42. Global XRF Sale Market Share by Application (2025)
- Figure 43. Global XRF Revenue Market Share by Application in 2025
- Figure 44. XRF Sales by Company in 2025 (Units)
- Figure 45. Global XRF Sales Market Share by Company in 2025
- Figure 46. XRF Revenue by Company in 2025 (\$ millions)
- Figure 47. Global XRF Revenue Market Share by Company in 2025
- Figure 48. Global XRF Sales Market Share by Geographic Region (2021-2026)
- Figure 49. Global XRF Revenue Market Share by Geographic Region in 2025
- Figure 50. Americas XRF Sales 2021-2026 (Units)
- Figure 51. Americas XRF Revenue 2021-2026 (\$ millions)
- Figure 52. APAC XRF Sales 2021-2026 (Units)
- Figure 53. APAC XRF Revenue 2021-2026 (\$ millions)
- Figure 54. Europe XRF Sales 2021-2026 (Units)
- Figure 55. Europe XRF Revenue 2021-2026 (\$ millions)
- Figure 56. Middle East & Africa XRF Sales 2021-2026 (Units)
- Figure 57. Middle East & Africa XRF Revenue 2021-2026 (\$ millions)
- Figure 58. Americas XRF Sales Market Share by Country in 2025
- Figure 59. Americas XRF Revenue Market Share by Country (2021-2026)
- Figure 60. Americas XRF Sales Market Share by Type (2021-2026)
- Figure 61. Americas XRF Sales Market Share by Application (2021-2026)
- Figure 62. United States XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 63. Canada XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Mexico XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 65. Brazil XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 66. APAC XRF Sales Market Share by Region in 2025
- Figure 67. APAC XRF Revenue Market Share by Region (2021-2026)
- Figure 68. APAC XRF Sales Market Share by Type (2021-2026)
- Figure 69. APAC XRF Sales Market Share by Application (2021-2026)
- Figure 70. China XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 71. Japan XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 72. South Korea XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 73. Southeast Asia XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 74. India XRF Revenue Growth 2021-2026 (\$ millions)

- Figure 75. Australia XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 76. China Taiwan XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 77. Europe XRF Sales Market Share by Country in 2025
- Figure 78. Europe XRF Revenue Market Share by Country (2021-2026)
- Figure 79. Europe XRF Sales Market Share by Type (2021-2026)
- Figure 80. Europe XRF Sales Market Share by Application (2021-2026)
- Figure 81. Germany XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 82. France XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 83. UK XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 84. Italy XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Russia XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 86. Middle East & Africa XRF Sales Market Share by Country (2021-2026)
- Figure 87. Middle East & Africa XRF Sales Market Share by Type (2021-2026)
- Figure 88. Middle East & Africa XRF Sales Market Share by Application (2021-2026)
- Figure 89. Egypt XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 90. South Africa XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 91. Israel XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 92. Turkey XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 93. GCC Countries XRF Revenue Growth 2021-2026 (\$ millions)
- Figure 94. Manufacturing Cost Structure Analysis of XRF in 2026
- Figure 95. Manufacturing Process Analysis of XRF
- Figure 96. Industry Chain Structure of XRF
- Figure 97. Channels of Distribution
- Figure 98. Global XRF Sales Market Forecast by Region (2027-2032)
- Figure 99. Global XRF Revenue Market Share Forecast by Region (2027-2032)
- Figure 100. Global XRF Sales Market Share Forecast by Type (2027-2032)
- Figure 101. Global XRF Revenue Market Share Forecast by Type (2027-2032)
- Figure 102. Global XRF Sales Market Share Forecast by Application (2027-2032)
- Figure 103. Global XRF Revenue Market Share Forecast by Application (2027-2032)

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