

Global NDIR and FTIR Infrared Gas Analyzers Market Growth 2026-2032

<https://marketpublishers.com/r/N916254B1E13EN.html>

Date: January 2026

Pages: 206

Price: US\$ 3,660.00 (Single User License)

ID: N916254B1E13EN

Abstracts

The global NDIR and FTIR Infrared Gas Analyzers market size is predicted to grow from US\$ 843 million in 2025 to US\$ 1102 million in 2032; it is expected to grow at a CAGR of 4.2% from 2026 to 2032.

In 2024, global NDIR and FTIR Infrared Gas Analyzers sales reached approximately 56,435 units, with an average global market price of around US\$ 15,270 per unit.

NDIR and FTIR Infrared Gas Analyzers are instruments that identify and quantify gases by exploiting the fact that gas molecules absorb infrared radiation at characteristic wavelengths. By measuring how much IR light is attenuated as it passes through a sample cell, the analyzer can calculate gas concentrations. Typical systems include an IR source, a gas cell, optical components and detectors, plus signal processing and calibration/compensation modules. Depending on the sensing approach and spectral library, they can measure gases such as CO, CO₂, CH₄, NO_x, SO₂, and various VOCs. Key advantages include fast response, non-contact measurement, and suitability for continuous monitoring in process control, combustion optimization, emissions compliance, and workplace safety applications.

Production model typically follows “platform optical modules + modular assembly + calibration/validation delivery.” Core optical platforms (IR source/interferometer or filter set, gas cell/optics, detector), algorithms/software, and calibration workflows are often kept in-house to ensure long-term stability and repeatability. Commodity items—machined housings, PCB assembly, pumps/valves and flow control—are frequently sourced externally, while final clean assembly, leak/drift/cross-interference tests, T/P compensation, and factory calibration (using certified span gases or blending systems) are completed internally. Application engineering commonly adds explosion-

proof/corrosion-resistant designs, heated sampling, and sample-conditioning skids. Indicative gross margin is usually ~35%–55%: standardized online NDIR tends to be more volume- and cost-driven (~30%–45%), whereas multi-component FTIR, CEMS packages, and harsh-duty engineered solutions can move higher (~45%–60%) due to software/spectral libraries, conditioning systems, and project content; aftermarket service, calibration, and spares often carry higher margins. Value chain: upstream covers IR sources/detectors, optical filters/interferometers/mirrors, gas-cell materials and seals, pumps/valves/flow control, electronics & industrial communications, certified calibration gases and metrology services; midstream includes OEMs and system integrators (sample conditioning, cabinets, certifications, software platforms); downstream spans chemical & O&G process control, combustion & power, emissions compliance, semiconductor & gas supply, occupational safety, and lab analysis—sold via key-account/EPC direct sales plus channels/integrators for long-tail coverage, forming an integrated “instrument + project + service” stack.

Market Development Opportunities & Main Driving Factors

Growth in infrared gas analyzers is driven by a powerful overlap of regulatory enforcement, process efficiency, and decarbonization. The EU’s revised Industrial Emissions Directive tightens industrial emissions control and advances digital permitting, accelerating compliance-driven upgrades. In China, the Ministry of Ecology and Environment continues to advance technical specifications and standardized methods for continuous monitoring of stationary sources, strengthening the institutional certainty for online measurement across stack gas, process off-gas, and greenhouse gases. On the corporate side, leading players are expanding their emissions-monitoring and process-analytics capabilities through portfolio moves, while listed Chinese companies disclose FTIR/NDIR product coverage and multi-scenario penetration across environmental, industrial process, and laboratory markets.

Market Challenges, Risks, & Restraints

The key barrier is not 'being able to measure,' but delivering results that remain reliable, auditable, and field-proven over time. IR measurement must handle cross-interference, drift, and variable temperature/humidity/pressure under complex sample matrices, which often requires integrated delivery with sample conditioning, thermal control, and calibration infrastructure—making projects more service-intensive. Regional differences in regulations, certifications, and site acceptance standards raise the bar for traceability and metrological rigor. Brokerage research also notes that spending on environmental and online process analytics can be sensitive to macro and capex cycles, while gaps in

critical components or engineering capability can amplify margin volatility and execution risk under intensifying competition.

Downstream Demand Trends

Downstream demand is shifting from 'single concentration readings' toward system-level diagnostics and closed-loop data workflows. In process industries such as steel and coal chemicals, users increasingly prioritize explosion-proofing, corrosion resistance, and low-maintenance online IR analysis to support optimization and safe operation. On the emissions side, requirements are moving toward multi-component identification, stable performance at low ranges, and stronger data-quality governance—plus tighter integration with regulatory platforms, plant DCS/PLC systems, audit trails, and remote O&M. Ongoing advances in compliance testing and standardized methods are also pushing FTIR/NDIR from standalone instrument sales toward an integrated 'hardware + software + service' value chain.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas

Analyzers.

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

Segmentation by Type:

Portable

Desktop

Segmentation by Technology:

NDIR

FTIR

Segmentation by Measurement Form:

Extractive

In-situ

Open-path

Segmentation by Component:

Single Component

Multi-Component

Segmentation by Application:

Energy and Electricity

Oil and Gas

Chemicals and Petrochemicals

Metals and Mining

Fertilizers and Cement

Education and Scientific Research

Waste Incineration

Automotive Industry

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.

ABB

Fuji Electric

Thermo Fisher Scientific

HORIBA

Emerson

Yokogawa Electric

MKS Inc.

CAI ENVEA Group

Gasmet Technologies

Beijing SDL Technology

Shimadzu

Servomex (Spectris)

Siemens

Endress+Hauser

Focused Photonics Inc.

Teledyne Analytical Instruments

AMETEK

Bruker

Cubic Sensor and Instrument

Nanhua Instrument

Shanghai ChangAi

LI-COR Environmental

LESHI Tech

Beijing Jun-Fang-LI-HUA

Protea Ltd

Beijing Xibi Instrument

Wuhan Ganwei Technology

Qingdao lonying

Beijing HUAYUN Analytical Instrument

Hangzhou Chunlai Technology

SIGAS Measurement

Key Questions Addressed in this Report

What is the 10-year outlook for the global NDIR and FTIR Infrared Gas Analyzers market?

What factors are driving NDIR and FTIR Infrared Gas Analyzers market growth, globally and by region?

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

How do NDIR and FTIR Infrared Gas Analyzers market opportunities vary by end market size?

How does NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for NDIR and FTIR Infrared Gas Analyzers by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for NDIR and FTIR Infrared Gas Analyzers by Country/Region, 2021, 2025 & 2032

2.2 NDIR and FTIR Infrared Gas Analyzers Segment by Type

- 2.2.1 Portable
- 2.2.2 Desktop
- 2.2.3 NDIR and FTIR Infrared Gas Analyzers Sales by Type
 - 2.2.3.1 Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Type (2021-2026)

2.3 NDIR and FTIR Infrared Gas Analyzers Segment by Technology

- 2.3.1 NDIR
- 2.3.2 FTIR
- 2.3.3 NDIR and FTIR Infrared Gas Analyzers Sales by Technology
 - 2.3.3.1 Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Technology (2021-2026)
 - 2.3.3.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue and Market Share by Technology (2021-2026)

2.3.3.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Technology (2021-2026)

2.4 NDIR and FTIR Infrared Gas Analyzers Segment by Measurement Form

2.4.1 Extractive

2.4.2 In-situ

2.4.3 Open-path

2.4.4 NDIR and FTIR Infrared Gas Analyzers Sales by Measurement Form

2.4.4.1 Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Measurement Form (2021-2026)

2.4.4.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue and Market Share by Measurement Form (2021-2026)

2.4.4.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Measurement Form (2021-2026)

2.5 NDIR and FTIR Infrared Gas Analyzers Segment by Component

2.5.1 Single Component

2.5.2 Multi-Component

2.5.3 NDIR and FTIR Infrared Gas Analyzers Sales by Component

2.5.3.1 Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Component (2021-2026)

2.5.3.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue and Market Share by Component (2021-2026)

2.5.3.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Component (2021-2026)

2.6 NDIR and FTIR Infrared Gas Analyzers Segment by Application

2.6.1 Energy and Electricity

2.6.2 Oil and Gas

2.6.3 Chemicals and Petrochemicals

2.6.4 Metals and Mining

2.6.5 Fertilizers and Cement

2.6.6 Education and Scientific Research

2.6.7 Waste Incineration

2.6.8 Automotive Industry

2.6.9 Others

2.6.10 NDIR and FTIR Infrared Gas Analyzers Sales by Application

2.6.10.1 Global NDIR and FTIR Infrared Gas Analyzers Sale Market Share by Application (2021-2026)

2.6.10.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue and Market Share by Application (2021-2026)

2.6.10.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Application

(2021-2026)

3 GLOBAL BY COMPANY

3.1 Global NDIR and FTIR Infrared Gas Analyzers Breakdown Data by Company

3.1.1 Global NDIR and FTIR Infrared Gas Analyzers Annual Sales by Company
(2021-2026)

3.1.2 Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Company
(2021-2026)

3.2 Global NDIR and FTIR Infrared Gas Analyzers Annual Revenue by Company
(2021-2026)

3.2.1 Global NDIR and FTIR Infrared Gas Analyzers Revenue by Company
(2021-2026)

3.2.2 Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by
Company (2021-2026)

3.3 Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Company

3.4 Key Manufacturers NDIR and FTIR Infrared Gas Analyzers Producing Area
Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers NDIR and FTIR Infrared Gas Analyzers Product Location
Distribution

3.4.2 Players NDIR and FTIR Infrared Gas Analyzers 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 NDIR AND FTIR INFRARED GAS ANALYZERS BY GEOGRAPHIC REGION

4.1 World Historic NDIR and FTIR Infrared Gas Analyzers Market Size by Geographic
Region (2021-2026)

4.1.1 Global NDIR and FTIR Infrared Gas Analyzers Annual Sales by Geographic
Region (2021-2026)

4.1.2 Global NDIR and FTIR Infrared Gas Analyzers Annual Revenue by Geographic
Region (2021-2026)

4.2 World Historic NDIR and FTIR Infrared Gas Analyzers Market Size by
Country/Region (2021-2026)

4.2.1 Global NDIR and FTIR Infrared Gas Analyzers Annual Sales by Country/Region

(2021-2026)

4.2.2 Global NDIR and FTIR Infrared Gas Analyzers Annual Revenue by Country/Region (2021-2026)

4.3 Americas NDIR and FTIR Infrared Gas Analyzers Sales Growth

4.4 APAC NDIR and FTIR Infrared Gas Analyzers Sales Growth

4.5 Europe NDIR and FTIR Infrared Gas Analyzers Sales Growth

4.6 Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales Growth

5 AMERICAS

5.1 Americas NDIR and FTIR Infrared Gas Analyzers Sales by Country

5.1.1 Americas NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026)

5.1.2 Americas NDIR and FTIR Infrared Gas Analyzers Revenue by Country (2021-2026)

5.2 Americas NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026)

5.3 Americas NDIR and FTIR Infrared Gas Analyzers Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC NDIR and FTIR Infrared Gas Analyzers Sales by Region

6.1.1 APAC NDIR and FTIR Infrared Gas Analyzers Sales by Region (2021-2026)

6.1.2 APAC NDIR and FTIR Infrared Gas Analyzers Revenue by Region (2021-2026)

6.2 APAC NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026)

6.3 APAC NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers by Country

- 7.1.1 Europe NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026)
- 7.1.2 Europe NDIR and FTIR Infrared Gas Analyzers Revenue by Country (2021-2026)
- 7.2 Europe NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026)
- 7.3 Europe NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers by Country
 - 8.1.1 Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Revenue by Country (2021-2026)
- 8.2 Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026)
- 8.3 Middle East & Africa NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers
- 10.3 Manufacturing Process Analysis of NDIR and FTIR Infrared Gas Analyzers

10.4 Industry Chain Structure of NDIR and FTIR Infrared Gas Analyzers

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 NDIR and FTIR Infrared Gas Analyzers Distributors

11.3 NDIR and FTIR Infrared Gas Analyzers Customer

12 WORLD FORECAST REVIEW FOR NDIR AND FTIR INFRARED GAS ANALYZERS BY GEOGRAPHIC REGION

12.1 Global NDIR and FTIR Infrared Gas Analyzers Market Size Forecast by Region

12.1.1 Global NDIR and FTIR Infrared Gas Analyzers Forecast by Region (2027-2032)

12.1.2 Global NDIR and FTIR Infrared Gas Analyzers 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 NDIR and FTIR Infrared Gas Analyzers Forecast by Type (2027-2032)

12.7 Global NDIR and FTIR Infrared Gas Analyzers Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 ABB

13.1.1 ABB Company Information

13.1.2 ABB NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.1.3 ABB NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 ABB Main Business Overview

13.1.5 ABB Latest Developments

13.2 Fuji Electric

13.2.1 Fuji Electric Company Information

13.2.2 Fuji Electric NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.2.3 Fuji Electric NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Fuji Electric Main Business Overview

13.2.5 Fuji Electric Latest Developments

13.3 Thermo Fisher Scientific

13.3.1 Thermo Fisher Scientific Company Information

13.3.2 Thermo Fisher Scientific NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.3.3 Thermo Fisher Scientific NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Thermo Fisher Scientific Main Business Overview

13.3.5 Thermo Fisher Scientific Latest Developments

13.4 HORIBA

13.4.1 HORIBA Company Information

13.4.2 HORIBA NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.4.3 HORIBA NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 HORIBA Main Business Overview

13.4.5 HORIBA Latest Developments

13.5 Emerson

13.5.1 Emerson Company Information

13.5.2 Emerson NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.5.3 Emerson NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Emerson Main Business Overview

13.5.5 Emerson Latest Developments

13.6 Yokogawa Electric

13.6.1 Yokogawa Electric Company Information

13.6.2 Yokogawa Electric NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.6.3 Yokogawa Electric NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Yokogawa Electric Main Business Overview

13.6.5 Yokogawa Electric Latest Developments

13.7 MKS Inc.

13.7.1 MKS Inc. Company Information

13.7.2 MKS Inc. NDIR and FTIR Infrared Gas Analyzers Product Portfolios and

Specifications

13.7.3 MKS Inc. NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 MKS Inc. Main Business Overview

13.7.5 MKS Inc. Latest Developments

13.8 CAI ENVEA Group

13.8.1 CAI ENVEA Group Company Information

13.8.2 CAI ENVEA Group NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.8.3 CAI ENVEA Group NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 CAI ENVEA Group Main Business Overview

13.8.5 CAI ENVEA Group Latest Developments

13.9 Gaset Technologies

13.9.1 Gaset Technologies Company Information

13.9.2 Gaset Technologies NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.9.3 Gaset Technologies NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Gaset Technologies Main Business Overview

13.9.5 Gaset Technologies Latest Developments

13.10 Beijing SDL Technology

13.10.1 Beijing SDL Technology Company Information

13.10.2 Beijing SDL Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.10.3 Beijing SDL Technology NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Beijing SDL Technology Main Business Overview

13.10.5 Beijing SDL Technology Latest Developments

13.11 Shimadzu

13.11.1 Shimadzu Company Information

13.11.2 Shimadzu NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.11.3 Shimadzu NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Shimadzu Main Business Overview

13.11.5 Shimadzu Latest Developments

13.12 Servomex (Spectris)

13.12.1 Servomex (Spectris) Company Information

- 13.12.2 Servomex (Spectris) NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.12.3 Servomex (Spectris) NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Servomex (Spectris) Main Business Overview
 - 13.12.5 Servomex (Spectris) Latest Developments
- 13.13 Siemens
 - 13.13.1 Siemens Company Information
 - 13.13.2 Siemens NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.13.3 Siemens NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Siemens Main Business Overview
 - 13.13.5 Siemens Latest Developments
- 13.14 Endress+Hauser
 - 13.14.1 Endress+Hauser Company Information
 - 13.14.2 Endress+Hauser NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.14.3 Endress+Hauser NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Endress+Hauser Main Business Overview
 - 13.14.5 Endress+Hauser Latest Developments
- 13.15 Focused Photonics Inc.
 - 13.15.1 Focused Photonics Inc. Company Information
 - 13.15.2 Focused Photonics Inc. NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.15.3 Focused Photonics Inc. NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Focused Photonics Inc. Main Business Overview
 - 13.15.5 Focused Photonics Inc. Latest Developments
- 13.16 Teledyne Analytical Instruments
 - 13.16.1 Teledyne Analytical Instruments Company Information
 - 13.16.2 Teledyne Analytical Instruments NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.16.3 Teledyne Analytical Instruments NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Teledyne Analytical Instruments Main Business Overview
 - 13.16.5 Teledyne Analytical Instruments Latest Developments
- 13.17 AMETEK

- 13.17.1 AMETEK Company Information
- 13.17.2 AMETEK NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
- 13.17.3 AMETEK NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.17.4 AMETEK Main Business Overview
- 13.17.5 AMETEK Latest Developments
- 13.18 Bruker
 - 13.18.1 Bruker Company Information
 - 13.18.2 Bruker NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.18.3 Bruker NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Bruker Main Business Overview
 - 13.18.5 Bruker Latest Developments
- 13.19 Cubic Sensor and Instrument
 - 13.19.1 Cubic Sensor and Instrument Company Information
 - 13.19.2 Cubic Sensor and Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.19.3 Cubic Sensor and Instrument NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Cubic Sensor and Instrument Main Business Overview
 - 13.19.5 Cubic Sensor and Instrument Latest Developments
- 13.20 Nanhua Instrument
 - 13.20.1 Nanhua Instrument Company Information
 - 13.20.2 Nanhua Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.20.3 Nanhua Instrument NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Nanhua Instrument Main Business Overview
 - 13.20.5 Nanhua Instrument Latest Developments
- 13.21 Shanghai ChangAi
 - 13.21.1 Shanghai ChangAi Company Information
 - 13.21.2 Shanghai ChangAi NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.21.3 Shanghai ChangAi NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 Shanghai ChangAi Main Business Overview
 - 13.21.5 Shanghai ChangAi Latest Developments

13.22 LI-COR Environmental

13.22.1 LI-COR Environmental Company Information

13.22.2 LI-COR Environmental NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.22.3 LI-COR Environmental NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 LI-COR Environmental Main Business Overview

13.22.5 LI-COR Environmental Latest Developments

13.23 LESH Tech

13.23.1 LESH Tech Company Information

13.23.2 LESH Tech NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.23.3 LESH Tech NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 LESH Tech Main Business Overview

13.23.5 LESH Tech Latest Developments

13.24 Beijing Jun-Fang-LI-HUA

13.24.1 Beijing Jun-Fang-LI-HUA Company Information

13.24.2 Beijing Jun-Fang-LI-HUA NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.24.3 Beijing Jun-Fang-LI-HUA NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Beijing Jun-Fang-LI-HUA Main Business Overview

13.24.5 Beijing Jun-Fang-LI-HUA Latest Developments

13.25 Protea Ltd

13.25.1 Protea Ltd Company Information

13.25.2 Protea Ltd NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.25.3 Protea Ltd NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Protea Ltd Main Business Overview

13.25.5 Protea Ltd Latest Developments

13.26 Beijing Xibi Instrument

13.26.1 Beijing Xibi Instrument Company Information

13.26.2 Beijing Xibi Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

13.26.3 Beijing Xibi Instrument NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 Beijing Xibi Instrument Main Business Overview

- 13.26.5 Beijing Xibi Instrument Latest Developments
- 13.27 Wuhan Ganwei Technology
 - 13.27.1 Wuhan Ganwei Technology Company Information
 - 13.27.2 Wuhan Ganwei Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.27.3 Wuhan Ganwei Technology NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 Wuhan Ganwei Technology Main Business Overview
 - 13.27.5 Wuhan Ganwei Technology Latest Developments
- 13.28 Qingdao lonying
 - 13.28.1 Qingdao lonying Company Information
 - 13.28.2 Qingdao lonying NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.28.3 Qingdao lonying NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Qingdao lonying Main Business Overview
 - 13.28.5 Qingdao lonying Latest Developments
- 13.29 Beijing HUAYUN Analytical Instrument
 - 13.29.1 Beijing HUAYUN Analytical Instrument Company Information
 - 13.29.2 Beijing HUAYUN Analytical Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.29.3 Beijing HUAYUN Analytical Instrument NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.29.4 Beijing HUAYUN Analytical Instrument Main Business Overview
 - 13.29.5 Beijing HUAYUN Analytical Instrument Latest Developments
- 13.30 Hangzhou Chunlai Technology
 - 13.30.1 Hangzhou Chunlai Technology Company Information
 - 13.30.2 Hangzhou Chunlai Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.30.3 Hangzhou Chunlai Technology NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.30.4 Hangzhou Chunlai Technology Main Business Overview
 - 13.30.5 Hangzhou Chunlai Technology Latest Developments
- 13.31 SIGAS Measurement
 - 13.31.1 SIGAS Measurement Company Information
 - 13.31.2 SIGAS Measurement NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications
 - 13.31.3 SIGAS Measurement NDIR and FTIR Infrared Gas Analyzers Sales, Revenue, Price and Gross Margin (2021-2026)

13.31.4 SIGAS Measurement Main Business Overview

13.31.5 SIGAS Measurement Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. NDIR and FTIR Infrared Gas Analyzers Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. NDIR and FTIR Infrared Gas Analyzers Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Portable

Table 4. Major Players of Desktop

Table 5. Global NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026) & (Units)

Table 6. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)

Table 7. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Type (2021-2026) & (\$ million)

Table 8. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Type (2021-2026)

Table 9. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of NDIR

Table 11. Major Players of FTIR

Table 12. Global NDIR and FTIR Infrared Gas Analyzers Sales by Technology (2021-2026) & (Units)

Table 13. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Technology (2021-2026)

Table 14. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Technology (2021-2026) & (\$ million)

Table 15. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Technology (2021-2026)

Table 16. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Technology (2021-2026) & (US\$/Unit)

Table 17. Major Players of Extractive

Table 18. Major Players of In-situ

Table 19. Major Players of Open-path

Table 20. Global NDIR and FTIR Infrared Gas Analyzers Sales by Measurement Form (2021-2026) & (Units)

Table 21. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Measurement Form (2021-2026)

- Table 22. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Measurement Form (2021-2026) & (\$ million)
- Table 23. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Measurement Form (2021-2026)
- Table 24. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Measurement Form (2021-2026) & (US\$/Unit)
- Table 25. Major Players of Single Component
- Table 26. Major Players of Multi-Component
- Table 27. Global NDIR and FTIR Infrared Gas Analyzers Sales by Component (2021-2026) & (Units)
- Table 28. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Component (2021-2026)
- Table 29. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Component (2021-2026) & (\$ million)
- Table 30. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Component (2021-2026)
- Table 31. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Component (2021-2026) & (US\$/Unit)
- Table 32. Global NDIR and FTIR Infrared Gas Analyzers Sale by Application (2021-2026) & (Units)
- Table 33. Global NDIR and FTIR Infrared Gas Analyzers Sale Market Share by Application (2021-2026)
- Table 34. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Application (2021-2026) & (\$ million)
- Table 35. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Application (2021-2026)
- Table 36. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Application (2021-2026) & (US\$/Unit)
- Table 37. Global NDIR and FTIR Infrared Gas Analyzers Sales by Company (2021-2026) & (Units)
- Table 38. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Company (2021-2026)
- Table 39. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Company (2021-2026) & (\$ millions)
- Table 40. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Company (2021-2026)
- Table 41. Global NDIR and FTIR Infrared Gas Analyzers Sale Price by Company (2021-2026) & (US\$/Unit)
- Table 42. Key Manufacturers NDIR and FTIR Infrared Gas Analyzers Producing Area

Distribution and Sales Area

Table 43. Players NDIR and FTIR Infrared Gas Analyzers Products Offered

Table 44. NDIR and FTIR Infrared Gas Analyzers Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 45. New Products and Potential Entrants

Table 46. Market M&A Activity & Strategy

Table 47. Global NDIR and FTIR Infrared Gas Analyzers Sales by Geographic Region (2021-2026) & (Units)

Table 48. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share Geographic Region (2021-2026)

Table 49. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 50. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Geographic Region (2021-2026)

Table 51. Global NDIR and FTIR Infrared Gas Analyzers Sales by Country/Region (2021-2026) & (Units)

Table 52. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country/Region (2021-2026)

Table 53. Global NDIR and FTIR Infrared Gas Analyzers Revenue by Country/Region (2021-2026) & (\$ millions)

Table 54. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Country/Region (2021-2026)

Table 55. Americas NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026) & (Units)

Table 56. Americas NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country (2021-2026)

Table 57. Americas NDIR and FTIR Infrared Gas Analyzers Revenue by Country (2021-2026) & (\$ millions)

Table 58. Americas NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026) & (Units)

Table 59. Americas NDIR and FTIR Infrared Gas Analyzers Sales by Application (2021-2026) & (Units)

Table 60. APAC NDIR and FTIR Infrared Gas Analyzers Sales by Region (2021-2026) & (Units)

Table 61. APAC NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Region (2021-2026)

Table 62. APAC NDIR and FTIR Infrared Gas Analyzers Revenue by Region (2021-2026) & (\$ millions)

Table 63. APAC NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026) &

(Units)

Table 64. APAC NDIR and FTIR Infrared Gas Analyzers Sales by Application (2021-2026) & (Units)

Table 65. Europe NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026) & (Units)

Table 66. Europe NDIR and FTIR Infrared Gas Analyzers Revenue by Country (2021-2026) & (\$ millions)

Table 67. Europe NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026) & (Units)

Table 68. Europe NDIR and FTIR Infrared Gas Analyzers Sales by Application (2021-2026) & (Units)

Table 69. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales by Country (2021-2026) & (Units)

Table 70. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Country (2021-2026)

Table 71. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales by Type (2021-2026) & (Units)

Table 72. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales by Application (2021-2026) & (Units)

Table 73. Key Market Drivers & Growth Opportunities of NDIR and FTIR Infrared Gas Analyzers

Table 74. Key Market Challenges & Risks of NDIR and FTIR Infrared Gas Analyzers

Table 75. Key Industry Trends of NDIR and FTIR Infrared Gas Analyzers

Table 76. NDIR and FTIR Infrared Gas Analyzers Raw Material

Table 77. Key Suppliers of Raw Materials

Table 78. NDIR and FTIR Infrared Gas Analyzers Distributors List

Table 79. NDIR and FTIR Infrared Gas Analyzers Customer List

Table 80. Global NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Region (2027-2032) & (Units)

Table 81. Global NDIR and FTIR Infrared Gas Analyzers Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 82. Americas NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Country (2027-2032) & (Units)

Table 83. Americas NDIR and FTIR Infrared Gas Analyzers Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. APAC NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Region (2027-2032) & (Units)

Table 85. APAC NDIR and FTIR Infrared Gas Analyzers Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 86. Europe NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Country (2027-2032) & (Units)

Table 87. Europe NDIR and FTIR Infrared Gas Analyzers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 88. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Country (2027-2032) & (Units)

Table 89. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 90. Global NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Type (2027-2032) & (Units)

Table 91. Global NDIR and FTIR Infrared Gas Analyzers Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 92. Global NDIR and FTIR Infrared Gas Analyzers Sales Forecast by Application (2027-2032) & (Units)

Table 93. Global NDIR and FTIR Infrared Gas Analyzers Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 94. ABB Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 95. ABB NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 96. ABB NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 97. ABB Main Business

Table 98. ABB Latest Developments

Table 99. Fuji Electric Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 100. Fuji Electric NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 101. Fuji Electric NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 102. Fuji Electric Main Business

Table 103. Fuji Electric Latest Developments

Table 104. Thermo Fisher Scientific Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 105. Thermo Fisher Scientific NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 106. Thermo Fisher Scientific NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 107. Thermo Fisher Scientific Main Business

Table 108. Thermo Fisher Scientific Latest Developments

Table 109. HORIBA Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 110. HORIBA NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 111. HORIBA NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 112. HORIBA Main Business

Table 113. HORIBA Latest Developments

Table 114. Emerson Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 115. Emerson NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 116. Emerson NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 117. Emerson Main Business

Table 118. Emerson Latest Developments

Table 119. Yokogawa Electric Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 120. Yokogawa Electric NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 121. Yokogawa Electric NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 122. Yokogawa Electric Main Business

Table 123. Yokogawa Electric Latest Developments

Table 124. MKS Inc. Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 125. MKS Inc. NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 126. MKS Inc. NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 127. MKS Inc. Main Business

Table 128. MKS Inc. Latest Developments

Table 129. CAI ENVEA Group Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 130. CAI ENVEA Group NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 131. CAI ENVEA Group NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 132. CAI ENVEA Group Main Business

Table 133. CAI ENVEA Group Latest Developments

Table 134. Gaset Technologies Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 135. Gaset Technologies NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 136. Gaset Technologies NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 137. Gaset Technologies Main Business

Table 138. Gaset Technologies Latest Developments

Table 139. Beijing SDL Technology Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 140. Beijing SDL Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 141. Beijing SDL Technology NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 142. Beijing SDL Technology Main Business

Table 143. Beijing SDL Technology Latest Developments

Table 144. Shimadzu Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 145. Shimadzu NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 146. Shimadzu NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 147. Shimadzu Main Business

Table 148. Shimadzu Latest Developments

Table 149. Servomex (Spectris) Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 150. Servomex (Spectris) NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 151. Servomex (Spectris) NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 152. Servomex (Spectris) Main Business

Table 153. Servomex (Spectris) Latest Developments

Table 154. Siemens Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 155. Siemens NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 156. Siemens NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 157. Siemens Main Business

Table 158. Siemens Latest Developments

Table 159. Endress+Hauser Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 160. Endress+Hauser NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 161. Endress+Hauser NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 162. Endress+Hauser Main Business

Table 163. Endress+Hauser Latest Developments

Table 164. Focused Photonics Inc. Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 165. Focused Photonics Inc. NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 166. Focused Photonics Inc. NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 167. Focused Photonics Inc. Main Business

Table 168. Focused Photonics Inc. Latest Developments

Table 169. Teledyne Analytical Instruments Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 170. Teledyne Analytical Instruments NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 171. Teledyne Analytical Instruments NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 172. Teledyne Analytical Instruments Main Business

Table 173. Teledyne Analytical Instruments Latest Developments

Table 174. AMETEK Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 175. AMETEK NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 176. AMETEK NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 177. AMETEK Main Business

Table 178. AMETEK Latest Developments

Table 179. Bruker Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 180. Bruker NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 181. Bruker NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 182. Bruker Main Business

Table 183. Bruker Latest Developments

Table 184. Cubic Sensor and Instrument Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 185. Cubic Sensor and Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 186. Cubic Sensor and Instrument NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 187. Cubic Sensor and Instrument Main Business

Table 188. Cubic Sensor and Instrument Latest Developments

Table 189. Nanhua Instrument Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 190. Nanhua Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 191. Nanhua Instrument NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 192. Nanhua Instrument Main Business

Table 193. Nanhua Instrument Latest Developments

Table 194. Shanghai ChangAi Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 195. Shanghai ChangAi NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 196. Shanghai ChangAi NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 197. Shanghai ChangAi Main Business

Table 198. Shanghai ChangAi Latest Developments

Table 199. LI-COR Environmental Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 200. LI-COR Environmental NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 201. LI-COR Environmental NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 202. LI-COR Environmental Main Business

Table 203. LI-COR Environmental Latest Developments

Table 204. LESH Tech Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 205. LESH Tech NDIR and FTIR Infrared Gas Analyzers Product Portfolios and

Specifications

Table 206. LESH Tech NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 207. LESH Tech Main Business

Table 208. LESH Tech Latest Developments

Table 209. Beijing Jun-Fang-LI-HUA Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 210. Beijing Jun-Fang-LI-HUA NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 211. Beijing Jun-Fang-LI-HUA NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 212. Beijing Jun-Fang-LI-HUA Main Business

Table 213. Beijing Jun-Fang-LI-HUA Latest Developments

Table 214. Protea Ltd Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 215. Protea Ltd NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 216. Protea Ltd NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 217. Protea Ltd Main Business

Table 218. Protea Ltd Latest Developments

Table 219. Beijing Xibi Instrument Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 220. Beijing Xibi Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 221. Beijing Xibi Instrument NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 222. Beijing Xibi Instrument Main Business

Table 223. Beijing Xibi Instrument Latest Developments

Table 224. Wuhan Ganwei Technology Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 225. Wuhan Ganwei Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 226. Wuhan Ganwei Technology NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 227. Wuhan Ganwei Technology Main Business

Table 228. Wuhan Ganwei Technology Latest Developments

Table 229. Qingdao lonying Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 230. Qingdao lonying NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 231. Qingdao lonying NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 232. Qingdao lonying Main Business

Table 233. Qingdao lonying Latest Developments

Table 234. Beijing HUAYUN Analytical Instrument Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 235. Beijing HUAYUN Analytical Instrument NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 236. Beijing HUAYUN Analytical Instrument NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 237. Beijing HUAYUN Analytical Instrument Main Business

Table 238. Beijing HUAYUN Analytical Instrument Latest Developments

Table 239. Hangzhou Chunlai Technology Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 240. Hangzhou Chunlai Technology NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 241. Hangzhou Chunlai Technology NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 242. Hangzhou Chunlai Technology Main Business

Table 243. Hangzhou Chunlai Technology Latest Developments

Table 244. SIGAS Measurement Basic Information, NDIR and FTIR Infrared Gas Analyzers Manufacturing Base, Sales Area and Its Competitors

Table 245. SIGAS Measurement NDIR and FTIR Infrared Gas Analyzers Product Portfolios and Specifications

Table 246. SIGAS Measurement NDIR and FTIR Infrared Gas Analyzers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 247. SIGAS Measurement Main Business

Table 248. SIGAS Measurement Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of NDIR and FTIR Infrared Gas Analyzers

Figure 2. NDIR and FTIR Infrared Gas Analyzers Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global NDIR and FTIR Infrared Gas Analyzers Sales Growth Rate 2021-2032 (Units)

Figure 7. Global NDIR and FTIR Infrared Gas Analyzers Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. NDIR and FTIR Infrared Gas Analyzers Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country/Region (2025)

Figure 10. NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Portable

Figure 12. Product Picture of Desktop

Figure 13. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type in 2026

Figure 14. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of NDIR

Figure 16. Product Picture of FTIR

Figure 17. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Technology in 2026

Figure 18. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Technology (2021-2026)

Figure 19. Product Picture of Extractive

Figure 20. Product Picture of In-situ

Figure 21. Product Picture of Open-path

Figure 22. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Measurement Form in 2026

Figure 23. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Measurement Form (2021-2026)

Figure 24. Product Picture of Single Component

Figure 25. Product Picture of Multi-Component

Figure 26. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Component in 2026

Figure 27. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Component (2021-2026)

Figure 28. NDIR and FTIR Infrared Gas Analyzers Consumed in Energy and Electricity

Figure 29. Global NDIR and FTIR Infrared Gas Analyzers Market: Energy and Electricity (2021-2026) & (Units)

Figure 30. NDIR and FTIR Infrared Gas Analyzers Consumed in Oil and Gas

Figure 31. Global NDIR and FTIR Infrared Gas Analyzers Market: Oil and Gas (2021-2026) & (Units)

Figure 32. NDIR and FTIR Infrared Gas Analyzers Consumed in Chemicals and Petrochemicals

Figure 33. Global NDIR and FTIR Infrared Gas Analyzers Market: Chemicals and Petrochemicals (2021-2026) & (Units)

Figure 34. NDIR and FTIR Infrared Gas Analyzers Consumed in Metals and Mining

Figure 35. Global NDIR and FTIR Infrared Gas Analyzers Market: Metals and Mining (2021-2026) & (Units)

Figure 36. NDIR and FTIR Infrared Gas Analyzers Consumed in Fertilizers and Cement

Figure 37. Global NDIR and FTIR Infrared Gas Analyzers Market: Fertilizers and Cement (2021-2026) & (Units)

Figure 38. NDIR and FTIR Infrared Gas Analyzers Consumed in Education and Scientific Research

Figure 39. Global NDIR and FTIR Infrared Gas Analyzers Market: Education and Scientific Research (2021-2026) & (Units)

Figure 40. NDIR and FTIR Infrared Gas Analyzers Consumed in Waste Incineration

Figure 41. Global NDIR and FTIR Infrared Gas Analyzers Market: Waste Incineration (2021-2026) & (Units)

Figure 42. NDIR and FTIR Infrared Gas Analyzers Consumed in Automotive Industry

Figure 43. Global NDIR and FTIR Infrared Gas Analyzers Market: Automotive Industry (2021-2026) & (Units)

Figure 44. NDIR and FTIR Infrared Gas Analyzers Consumed in Others

Figure 45. Global NDIR and FTIR Infrared Gas Analyzers Market: Others (2021-2026) & (Units)

Figure 46. Global NDIR and FTIR Infrared Gas Analyzers Sale Market Share by Application (2025)

Figure 47. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Application in 2026

Figure 48. NDIR and FTIR Infrared Gas Analyzers Sales by Company in 2026 (Units)

Figure 49. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Company in 2026

Figure 50. NDIR and FTIR Infrared Gas Analyzers Revenue by Company in 2026 (\$ millions)

Figure 51. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Company in 2026

Figure 52. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Geographic Region (2021-2026)

Figure 53. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Geographic Region in 2026

Figure 54. Americas NDIR and FTIR Infrared Gas Analyzers Sales 2021-2026 (Units)

Figure 55. Americas NDIR and FTIR Infrared Gas Analyzers Revenue 2021-2026 (\$ millions)

Figure 56. APAC NDIR and FTIR Infrared Gas Analyzers Sales 2021-2026 (Units)

Figure 57. APAC NDIR and FTIR Infrared Gas Analyzers Revenue 2021-2026 (\$ millions)

Figure 58. Europe NDIR and FTIR Infrared Gas Analyzers Sales 2021-2026 (Units)

Figure 59. Europe NDIR and FTIR Infrared Gas Analyzers Revenue 2021-2026 (\$ millions)

Figure 60. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales 2021-2026 (Units)

Figure 61. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Revenue 2021-2026 (\$ millions)

Figure 62. Americas NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country in 2026

Figure 63. Americas NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Country (2021-2026)

Figure 64. Americas NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)

Figure 65. Americas NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Application (2021-2026)

Figure 66. United States NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 67. Canada NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 68. Mexico NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 69. Brazil NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 70. APAC NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Region in 2026

Figure 71. APAC NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Region (2021-2026)

Figure 72. APAC NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)

Figure 73. APAC NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Application (2021-2026)

Figure 74. China NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 75. Japan NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 76. South Korea NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 77. Southeast Asia NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 78. India NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 79. Australia NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 80. China Taiwan NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 81. Europe NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country in 2026

Figure 82. Europe NDIR and FTIR Infrared Gas Analyzers Revenue Market Share by Country (2021-2026)

Figure 83. Europe NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)

Figure 84. Europe NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Application (2021-2026)

Figure 85. Germany NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 86. France NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 87. UK NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 88. Italy NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 89. Russia NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026

(\$ millions)

Figure 90. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Country (2021-2026)

Figure 91. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Type (2021-2026)

Figure 92. Middle East & Africa NDIR and FTIR Infrared Gas Analyzers Sales Market Share by Application (2021-2026)

Figure 93. Egypt NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 94. South Africa NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 95. Israel NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 96. Turkey NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 97. GCC Countries NDIR and FTIR Infrared Gas Analyzers Revenue Growth 2021-2026 (\$ millions)

Figure 98. Manufacturing Cost Structure Analysis of NDIR and FTIR Infrared Gas Analyzers in 2026

Figure 99. Manufacturing Process Analysis of NDIR and FTIR Infrared Gas Analyzers

Figure 100. Industry Chain Structure of NDIR and FTIR Infrared Gas Analyzers

Figure 101. Channels of Distribution

Figure 102. Global NDIR and FTIR Infrared Gas Analyzers Sales Market Forecast by Region (2027-2032)

Figure 103. Global NDIR and FTIR Infrared Gas Analyzers Revenue Market Share Forecast by Region (2027-2032)

Figure 104. Global NDIR and FTIR In

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