



MRS26-257 · Smart Building Technologies

Indoor Air Quality (IAQ) Monitoring Systems

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Indoor air quality (IAQ) monitoring systems measure CO₂, particulates and VOCs to protect occupant health and drive demand-controlled ventilation. This decision-grade study sizes the global market three ways — value, unit volume and monitored area — across parameter, grade and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond sensing, IAQ monitoring delivers measurable occupant health, ventilation efficiency and verifiable air-quality reporting, while sensor circularity shapes the resource-security story.

Mapped Sustainable Development Goals:

SDG 3	SDG 11	SDG 7	SDG 9	SDG 13
Good Health & Well-Being	Sustainable Cities	Affordable & Clean Energy	Industry & Innovation	Climate Action

Measurable sustainability outcomes assessed:

- Healthier indoor environments and occupant-health protection
- Ventilation efficiency through demand-controlled ventilation
- Verifiable, certification-ready air-quality reporting (WELL, RESET)
- Sensor embodied carbon, end-of-life and data privacy as material considerations

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped



MARKET OVERVIEW

From niche sensing to standard healthy-building infrastructure — where actionable air data drives ventilation and wellness.

The indoor air quality (IAQ) monitoring systems market is read three ways — value, volume and monitored area — and forecast under four scenarios, each region reported separately. Demand is propelled by the drivers below, supported by maturing incentives across Europe, North America and Asia Pacific.

- North America is profiled first — United States, Canada — large commercial stock, retrofit demand, ESG reporting
- Europe policy leader — Germany, United Kingdom, France, Nordics — energy codes, CSRD, healthy-building rules
- Segmentation reads the value across the report's structure, technology and application axes
- Resource-and-outcome economics is the differentiator — increasingly with service and data revenue

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Adoption leader	United States, Canada — large commercial stock, retrofit demand, ESG reporting
Europe	Policy leader	Germany, United Kingdom, France, Nordics — energy codes, CSRD, healthy-building rules
Asia Pacific	Scale engine	China, Japan, India, Australia, Singapore — smart new-build, urbanisation, manufacturing
Latin America	Emerging	Brazil, Mexico — commercial modernisation, energy-cost drivers
Middle East	High-growth	UAE, Saudi Arabia — smart-city programmes, green-building mandates
Africa	Frontier	South Africa, Kenya — commercial estates, efficiency retrofit

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Occupant-health & wellness demand • Wellness certification (WELL, RESET) • Demand-controlled ventilation & energy balance • Post-pandemic indoor-air awareness • Low-cost sensor & analytics technology gains	• Sensor accuracy & drift/calibration • Standards & threshold fragmentation • Integration with HVAC & BMS • Sensor cost & lifecycle replacement • Data-interpretation & action gaps



SEGMENTATION SNAPSHOT

By Parameter	CO2 · PM2.5/PM10 · VOC/formaldehyde
By Grade	Consumer · commercial · reference/research
By Component	Gas/particle sensors · electronics · connectivity · software
By Application	Consumer · commercial · reference/research grade
By End User	Commercial offices · healthcare · schools · homes
By Business Model	Hardware sale · SaaS · monitoring service

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

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- › Chapter 2. Industry Discovery Summary — Indoor Air Quality (IAQ) Monitoring Systems
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

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- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
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Part IV — Technology, Innovation and Category-Specific Intelligence

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- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape



Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
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- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
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- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
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- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established building-technology majors, specialist hardware and software vendors, and systems integrators. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable solutions.

Representative players profiled in the full report:

Honeywell International Inc. · Siemens AG · Johnson Controls International plc · Aircuity, Inc. · Sensirion Holding AG · and 20+ further profiled players across hardware, software and integration.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global indoor air quality (IAQ) monitoring systems market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do resource-and-outcome economics change returns versus conventional methods?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear investment verdict.

WHO SHOULD BUY THIS REPORT

Investors, sensor OEMs, integrators, building owners, facility managers, health & wellness teams, lenders, research institutions, policymakers, strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.