

Flare Gas Recovery System Market By Component (Compressors, Control Systems, Others) , By Application (Onshore, Offshore) By End-use (Oil and Gas, Petrochemicals, Power Generation, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The flare gas recovery system market was valued at \$2.9 billion in 2023, and is projected to reach \$6.8 billion by 2033, growing at a CAGR of 8.9% from 2024 to 2033.

Flare gas recovery unit is designed to recover and repurpose waste gases, thereby reducing methane emissions and routine flaring events. Gas flaring involves burning excess gases that are generated during various industrial processes, particularly in the oil & gas sectors and chemical and petrochemical production. Flaring these gases is a common practice that has been raising alarming concerns about environmental sustainability. Hence, flare gas recovery systems are being increasingly deployed to mitigate the environmental impact of gas flaring.

The growth of the flare gas recovery system market is majorly driven by increase in environmental concerns due to rise in emission of hazardous gases. In addition, implementation of stringent government regulations to mitigate greenhouse gas emissions and address the issue of gas flaring and associated environmental impact is boosting the deployment of flare gas recovery units in industries. For instance, the U.S. Environmental Protection Agency has enforced the Clean Air Act, which is responsible for regulating gas flaring. Moreover, increase in government initiatives to regulate the emission of air pollutants from flaring activities and to promote the

conservation and efficient use of natural gas resources significantly contribute toward the growth of the global market. For instance, the World Bank's Zero Routine Flaring by 2030 Initiative aims to eliminate routine flaring globally by 2030. Many countries and oil companies have planned to comply with this initiative, which will considerably aid in lowering the environmental concerns associated with gas flaring. Furthermore, surge in installation of flare gas recovery systems acts as a key driving force of the global market, as recovering flare gas and repurposing it as a fuel or feedstock reduces the need for purchasing additional fuel, leading to significant cost savings. Installation of flare gas systems further helps companies to lessen the risk of emissions-related fines and penalties, thus offering dual benefits of reducing operational costs and improving environmental stewardship simultaneously. However, high initial capital investment and operational costs act as the key deterrent factors of the market. In addition, complexity of integrating these systems into existing infrastructure pose technical challenges and require specialized expertise. These systems further require regular inspection and servicing to ensure optimal working conditions, which incur additional costs, thereby restraining the growth of the market. On the contrary, continuous technological advancements in flare gas recovery systems are expected to offer remunerative opportunities for the expansion of the market during the forecast period. For instance, modern flare gas recovery systems are being integrated with cutting-edge components such as high-efficiency compressors and real-time monitoring-enabled control systems.

The flare gas recovery system market is segmented on the basis of component, application, end use, and region. By component, the market is classified into compressors, control systems, and others. On the basis of application, it is divided into onshore and offshore. Depending on end use, it is categorized into oil and gas, petrochemicals, power generation, and others. Region wise, the flare gas recovery system market is studied across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

By component, the compressors segment is expected to exhibit strong growth by 2033.

On the basis of application, the onshore segment is expected to showcase fastest growth during the forecast period.

Depending on end use, the oil & gas segment is anticipated to gain high prominence

in the coming years.

Region wise, Asia-Pacific is likely to maintain its dominance by 2033.

Competition Analysis

Competitive analysis and profiles of the major players in the global Flare Gas Recovery System Market include Zeeco, Inc., Honeywell International Inc., John Zink Hamworthy Combustion, Wartsil Corporation, Transvac Systems Limited, Baker Hughes Company, Garo, Bharat Petroleum Corporation, GTUIT, and Gardner Denver Nash LLC. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the global market.

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SWOT Analysis

Key Market Segments

By Component

Compressors

Control Systems

Others

By Application

Onshore

Offshore

By End-use

Oil and Gas

Petrochemicals

Power Generation

Others

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Zeeco, Inc.

Honeywell International Inc.

John Zink Hamworthy Combustion

Wartsila Corporation

Transvac Systems Limited

Baker Hughes Company

Garo

Bharat Petroleum Corporation

GTUIT

Gardner Denver Nash LLC

Contents

CHAPTER 1: INTRODUCTION

- 1.1. Report Description
- 1.2. Key Market Segments
- 1.3. Key Benefits
- 1.4. Research Methodology
 - 1.4.1. Primary Research
 - 1.4.2. Secondary Research
 - 1.4.3. Analyst Tools and Models

CHAPTER 2: EXECUTIVE SUMMARY

- 2.1. CXO Perspective

CHAPTER 3: MARKET LANDSCAPE

- 3.1. Market Definition and Scope
- 3.2. Key Findings
 - 3.2.1. Top Investment Pockets
 - 3.2.2. Top Winning Strategies
- 3.3. Porter's Five Forces Analysis
 - 3.3.1. Bargaining Power of Suppliers
 - 3.3.2. Threat of New Entrants
 - 3.3.3. Threat of Substitutes
 - 3.3.4. Competitive Rivalry
 - 3.3.5. Bargaining Power among Buyers
- 3.4. Market Dynamics
 - 3.4.1. Drivers
 - 3.4.2. Restraints
 - 3.4.3. Opportunities

CHAPTER 4: AEROSPACE SEALANTS MARKET, BY RESIN TYPE

- 4.1. Market Overview
 - 4.1.1 Market Size and Forecast, By Resin Type
- 4.2. Polysulfide Sealants
 - 4.2.1. Key Market Trends, Growth Factors and Opportunities

- 4.2.2. Market Size and Forecast, By Region
- 4.2.3. Market Share Analysis, By Country
- 4.3. Silicone Sealants
 - 4.3.1. Key Market Trends, Growth Factors and Opportunities
 - 4.3.2. Market Size and Forecast, By Region
 - 4.3.3. Market Share Analysis, By Country
- 4.4. Polyurethane Sealants
 - 4.4.1. Key Market Trends, Growth Factors and Opportunities
 - 4.4.2. Market Size and Forecast, By Region
 - 4.4.3. Market Share Analysis, By Country
- 4.5. Others
 - 4.5.1. Key Market Trends, Growth Factors and Opportunities
 - 4.5.2. Market Size and Forecast, By Region
 - 4.5.3. Market Share Analysis, By Country

CHAPTER 5: AEROSPACE SEALANTS MARKET, BY APPLICATION

- 5.1. Market Overview
 - 5.1.1 Market Size and Forecast, By Application
- 5.2. Fuel Tank
 - 5.2.1. Key Market Trends, Growth Factors and Opportunities
 - 5.2.2. Market Size and Forecast, By Region
 - 5.2.3. Market Share Analysis, By Country
- 5.3. Airframe
 - 5.3.1. Key Market Trends, Growth Factors and Opportunities
 - 5.3.2. Market Size and Forecast, By Region
 - 5.3.3. Market Share Analysis, By Country
- 5.4. Avionics
 - 5.4.1. Key Market Trends, Growth Factors and Opportunities
 - 5.4.2. Market Size and Forecast, By Region
 - 5.4.3. Market Share Analysis, By Country
- 5.5. Windows Windshields
 - 5.5.1. Key Market Trends, Growth Factors and Opportunities
 - 5.5.2. Market Size and Forecast, By Region
 - 5.5.3. Market Share Analysis, By Country
- 5.6. Others
 - 5.6.1. Key Market Trends, Growth Factors and Opportunities
 - 5.6.2. Market Size and Forecast, By Region
 - 5.6.3. Market Share Analysis, By Country

CHAPTER 6: AEROSPACE SEALANTS MARKET, BY AIRCRAFT

6.1. Market Overview

6.1.1 Market Size and Forecast, By Aircraft

6.2. Commercial Aircraft

6.2.1. Key Market Trends, Growth Factors and Opportunities

6.2.2. Market Size and Forecast, By Region

6.2.3. Market Share Analysis, By Country

6.3. Military Aircraft

6.3.1. Key Market Trends, Growth Factors and Opportunities

6.3.2. Market Size and Forecast, By Region

6.3.3. Market Share Analysis, By Country

6.4. General Aviation

6.4.1. Key Market Trends, Growth Factors and Opportunities

6.4.2. Market Size and Forecast, By Region

6.4.3. Market Share Analysis, By Country

6.5. Helicopters

6.5.1. Key Market Trends, Growth Factors and Opportunities

6.5.2. Market Size and Forecast, By Region

6.5.3. Market Share Analysis, By Country

CHAPTER 7: AEROSPACE SEALANTS MARKET, BY REGION

7.1. Market Overview

7.1.1 Market Size and Forecast, By Region

7.2. North America

7.2.1. Key Market Trends and Opportunities

7.2.2. Market Size and Forecast, By Resin Type

7.2.3. Market Size and Forecast, By Application

7.2.4. Market Size and Forecast, By Aircraft

7.2.5. Market Size and Forecast, By Country

7.2.6. U.S. Aerospace Sealants Market

7.2.6.1. Market Size and Forecast, By Resin Type

7.2.6.2. Market Size and Forecast, By Application

7.2.6.3. Market Size and Forecast, By Aircraft

7.2.7. Canada Aerospace Sealants Market

7.2.7.1. Market Size and Forecast, By Resin Type

7.2.7.2. Market Size and Forecast, By Application

- 7.2.7.3. Market Size and Forecast, By Aircraft
- 7.2.8. Mexico Aerospace Sealants Market
 - 7.2.8.1. Market Size and Forecast, By Resin Type
 - 7.2.8.2. Market Size and Forecast, By Application
 - 7.2.8.3. Market Size and Forecast, By Aircraft
- 7.3. Europe
 - 7.3.1. Key Market Trends and Opportunities
 - 7.3.2. Market Size and Forecast, By Resin Type
 - 7.3.3. Market Size and Forecast, By Application
 - 7.3.4. Market Size and Forecast, By Aircraft
 - 7.3.5. Market Size and Forecast, By Country
 - 7.3.6. France Aerospace Sealants Market
 - 7.3.6.1. Market Size and Forecast, By Resin Type
 - 7.3.6.2. Market Size and Forecast, By Application
 - 7.3.6.3. Market Size and Forecast, By Aircraft
 - 7.3.7. Germany Aerospace Sealants Market
 - 7.3.7.1. Market Size and Forecast, By Resin Type
 - 7.3.7.2. Market Size and Forecast, By Application
 - 7.3.7.3. Market Size and Forecast, By Aircraft
 - 7.3.8. Italy Aerospace Sealants Market
 - 7.3.8.1. Market Size and Forecast, By Resin Type
 - 7.3.8.2. Market Size and Forecast, By Application
 - 7.3.8.3. Market Size and Forecast, By Aircraft
 - 7.3.9. Spain Aerospace Sealants Market
 - 7.3.9.1. Market Size and Forecast, By Resin Type
 - 7.3.9.2. Market Size and Forecast, By Application
 - 7.3.9.3. Market Size and Forecast, By Aircraft
 - 7.3.10. UK Aerospace Sealants Market
 - 7.3.10.1. Market Size and Forecast, By Resin Type
 - 7.3.10.2. Market Size and Forecast, By Application
 - 7.3.10.3. Market Size and Forecast, By Aircraft
 - 7.3.11. Rest of Europe Aerospace Sealants Market
 - 7.3.11.1. Market Size and Forecast, By Resin Type
 - 7.3.11.2. Market Size and Forecast, By Application
 - 7.3.11.3. Market Size and Forecast, By Aircraft
- 7.4. Asia-Pacific
 - 7.4.1. Key Market Trends and Opportunities
 - 7.4.2. Market Size and Forecast, By Resin Type
 - 7.4.3. Market Size and Forecast, By Application

- 7.4.4. Market Size and Forecast, By Aircraft
- 7.4.5. Market Size and Forecast, By Country
- 7.4.6. China Aerospace Sealants Market
 - 7.4.6.1. Market Size and Forecast, By Resin Type
 - 7.4.6.2. Market Size and Forecast, By Application
 - 7.4.6.3. Market Size and Forecast, By Aircraft
- 7.4.7. Japan Aerospace Sealants Market
 - 7.4.7.1. Market Size and Forecast, By Resin Type
 - 7.4.7.2. Market Size and Forecast, By Application
 - 7.4.7.3. Market Size and Forecast, By Aircraft
- 7.4.8. India Aerospace Sealants Market
 - 7.4.8.1. Market Size and Forecast, By Resin Type
 - 7.4.8.2. Market Size and Forecast, By Application
 - 7.4.8.3. Market Size and Forecast, By Aircraft
- 7.4.9. South Korea Aerospace Sealants Market
 - 7.4.9.1. Market Size and Forecast, By Resin Type
 - 7.4.9.2. Market Size and Forecast, By Application
 - 7.4.9.3. Market Size and Forecast, By Aircraft
- 7.4.10. Australia Aerospace Sealants Market
 - 7.4.10.1. Market Size and Forecast, By Resin Type
 - 7.4.10.2. Market Size and Forecast, By Application
 - 7.4.10.3. Market Size and Forecast, By Aircraft
- 7.4.11. Rest of Asia-Pacific Aerospace Sealants Market
 - 7.4.11.1. Market Size and Forecast, By Resin Type
 - 7.4.11.2. Market Size and Forecast, By Application
 - 7.4.11.3. Market Size and Forecast, By Aircraft
- 7.5. LAMEA
 - 7.5.1. Key Market Trends and Opportunities
 - 7.5.2. Market Size and Forecast, By Resin Type
 - 7.5.3. Market Size and Forecast, By Application
 - 7.5.4. Market Size and Forecast, By Aircraft
 - 7.5.5. Market Size and Forecast, By Country
 - 7.5.6. Brazil Aerospace Sealants Market
 - 7.5.6.1. Market Size and Forecast, By Resin Type
 - 7.5.6.2. Market Size and Forecast, By Application
 - 7.5.6.3. Market Size and Forecast, By Aircraft
 - 7.5.7. South Africa Aerospace Sealants Market
 - 7.5.7.1. Market Size and Forecast, By Resin Type
 - 7.5.7.2. Market Size and Forecast, By Application

- 7.5.7.3. Market Size and Forecast, By Aircraft
- 7.5.8. Saudi Arabia Aerospace Sealants Market
 - 7.5.8.1. Market Size and Forecast, By Resin Type
 - 7.5.8.2. Market Size and Forecast, By Application
 - 7.5.8.3. Market Size and Forecast, By Aircraft
- 7.5.9. Rest of LAMEA Aerospace Sealants Market
 - 7.5.9.1. Market Size and Forecast, By Resin Type
 - 7.5.9.2. Market Size and Forecast, By Application
 - 7.5.9.3. Market Size and Forecast, By Aircraft

CHAPTER 8: COMPETITIVE LANDSCAPE

- 8.1. Introduction
- 8.2. Top Winning Strategies
- 8.3. Product Mapping of Top 10 Player
- 8.4. Competitive Dashboard
- 8.5. Competitive Heatmap
- 8.6. Top Player Positioning, 2023

CHAPTER 9: COMPANY PROFILES

- 9.1. PPG Industries, Inc.
 - 9.1.1. Company Overview
 - 9.1.2. Key Executives
 - 9.1.3. Company Snapshot
 - 9.1.4. Operating Business Segments
 - 9.1.5. Product Portfolio
 - 9.1.6. Business Performance
 - 9.1.7. Key Strategic Moves and Developments
- 9.2. 3M
 - 9.2.1. Company Overview
 - 9.2.2. Key Executives
 - 9.2.3. Company Snapshot
 - 9.2.4. Operating Business Segments
 - 9.2.5. Product Portfolio
 - 9.2.6. Business Performance
 - 9.2.7. Key Strategic Moves and Developments
- 9.3. Ellsworth Adhesives
 - 9.3.1. Company Overview

- 9.3.2. Key Executives
- 9.3.3. Company Snapshot
- 9.3.4. Operating Business Segments
- 9.3.5. Product Portfolio
- 9.3.6. Business Performance
- 9.3.7. Key Strategic Moves and Developments
- 9.4. H.B. Fuller Company
 - 9.4.1. Company Overview
 - 9.4.2. Key Executives
 - 9.4.3. Company Snapshot
 - 9.4.4. Operating Business Segments
 - 9.4.5. Product Portfolio
 - 9.4.6. Business Performance
 - 9.4.7. Key Strategic Moves and Developments
- 9.5. Henkel Adhesives Technologies India Private Limited
 - 9.5.1. Company Overview
 - 9.5.2. Key Executives
 - 9.5.3. Company Snapshot
 - 9.5.4. Operating Business Segments
 - 9.5.5. Product Portfolio
 - 9.5.6. Business Performance
 - 9.5.7. Key Strategic Moves and Developments
- 9.6. Huntsman International LLC
 - 9.6.1. Company Overview
 - 9.6.2. Key Executives
 - 9.6.3. Company Snapshot
 - 9.6.4. Operating Business Segments
 - 9.6.5. Product Portfolio
 - 9.6.6. Business Performance
 - 9.6.7. Key Strategic Moves and Developments
- 9.7. Dow
 - 9.7.1. Company Overview
 - 9.7.2. Key Executives
 - 9.7.3. Company Snapshot
 - 9.7.4. Operating Business Segments
 - 9.7.5. Product Portfolio
 - 9.7.6. Business Performance
 - 9.7.7. Key Strategic Moves and Developments
- 9.8. Bostik

- 9.8.1. Company Overview
- 9.8.2. Key Executives
- 9.8.3. Company Snapshot
- 9.8.4. Operating Business Segments
- 9.8.5. Product Portfolio
- 9.8.6. Business Performance
- 9.8.7. Key Strategic Moves and Developments
- 9.9. Master Bond Inc.
 - 9.9.1. Company Overview
 - 9.9.2. Key Executives
 - 9.9.3. Company Snapshot
 - 9.9.4. Operating Business Segments
 - 9.9.5. Product Portfolio
 - 9.9.6. Business Performance
 - 9.9.7. Key Strategic Moves and Developments
- 9.10. Heron Manufacturing, Inc
 - 9.10.1. Company Overview
 - 9.10.2. Key Executives
 - 9.10.3. Company Snapshot
 - 9.10.4. Operating Business Segments
 - 9.10.5. Product Portfolio
 - 9.10.6. Business Performance
 - 9.10.7. Key Strategic Moves and Developments

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