

Industrial Emission Control Systems Market by Equipment Type (Electrostatic Precipitators, Cyclones, Fabric Filters), Emission Source (Power Generation Cement, Chemical, Manufacturing) - Global Opportunity Analysis and Industry Forecast, 2014 - 2022

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Abstracts

Industrial Emission Control Systems are devices that monitor and diminish the release of harmful products produced during combustion and other emission processes, which leads to environmental pollution. Industrial segments such as power generation, cement, mining & metals, chemical industries, and others utilize these systems to convert hazardous air contaminants, such as unburned hydrocarbons, carbon monoxide, nitrogen oxides, and sulfur oxides, into water vapor and carbon dioxide, which can be safely released into the atmosphere. Regulatory agencies globally have placed stringent limitations on acceptable emission levels, which need to be complied by industries or face the prospects of substantial fines, which may lead to shutdown of their operations. Companies globally are using these advanced emission control technologies to remain compliant and competitive in the market.

The global market for industrial emission control systems is driven by the stringent emission regulations, growth in the cement and coal power industries and increase in industrialization in developing countries. The growth in coal power sector in developing countries, such as India and China, also drives the market as the industry growth accounts for increased demand for emission control systems.

Factors that restrict the market growth are rise in use of alternate sources for power generation and reduction in investments in coal power from developed countries such as U.S., Germany, and other European countries. Countries in these regions are investing in alternate power sources such as wind, solar, and hydroelectric projects that

generate minimal emissions, which further minimizes the use of these systems. The global market is segmented based on equipment type, emission source, and geography. Based on equipment type, it is categorized into electrostatic precipitators, fabric filters, catalytic reactors, scrubbers, thermal oxidizers, cyclones, and others (biofilters, carbon adsorbers). Electrostatic precipitators occupied the highest share in the market. They are applicable in power plants, paper mills, smelters, cement plants, and petroleum refineries. High adoption of these equipment is due to their capability to operate at over 99% efficiency, low operating costs, and ability to handle large gas flow rates.

Based on emission source, the market is segmented into power generation, chemical, cement, mining & metals, pulp & paper, manufacturing, and others. Power generation was the most dominant end-user segment for emission control systems in 2015 and is expected to maintain its dominance over the forecast period. The mining & metal processing segment is expected to be the fastest growing segment among different emission sources. The growth for these equipment in mining industry is due to stringent emission standards and growth in metal processing industry.

The market is analyzed on the basis of four regions, namely, North America, Europe, Asia-Pacific, and LAMEA, along with their prominent respective countries. Asia-Pacific is the major contributor to the revenue, followed by North America. Governments in these regions have implemented stringent regulations to effectively regulate emissions from the industrial segment. The market in Asia-Pacific is driven by the newly formulated mercury emission regulations.

Key benefits

In-depth analysis of the global industrial emission control systems market, with current trends and future estimations to elucidate the imminent investment pockets, is provided.

The report presents information regarding key drivers, restraints, and opportunities with a detailed impact analysis.

Porter's Five Forces Model analyzes the market competitiveness by studying various parameters such as threat of new entrants, threat of substitutes, strength of the buyers, and strength of the suppliers operating in the market.

Value chain analysis signifies the key intermediaries involved and elaborates their roles and value additions at every stage.

The quantitative analysis of the market from 2014 to 2022 is provided to

elaborate the market potential.

MARKET SEGMENTATION

By Equipment Type

Electrostatic Precipitators

Fabric Filters

Scrubbers

Cyclone Separators

Thermal Oxidizers

Catalytic Reactors

Others

By Emission Source

Power Generation

Cement

Chemical & Petrochemical

Pulp & Paper

Manufacturing

Mining & Metals

Others

BY GEOGRAPHY

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Russia

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Rest of Asia-Pacific

LAMEA

Latin America

Middle East

Africa

Key Players

General Electric Company

Mitsubishi Hitachi Power Systems

Fujian Longking Co., Ltd

Johnson Matthey PLC

Ducon Technologies Inc.

Babcock & Wilcox Co.

Amec Foster Wheeler PLC

CECO Environmental Corp

Hamon Corporation

Thermax Ltd

BASF SE

Other players in the value chain include (profiles not included in the report):

APC Technologies Inc.

Auburn Systems LLC

Air Clean LLC

Epcon Industrial Systems

Anguil Environmental Systems

PPC Air Pollution Control Systems

Advanced Cyclone Systems

Dust Control Systems Ltd

Pennar Industries

Marsulex Environmental Technologies

United Air Specialists Inc.

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