

Global Cement Waste Heat Utilization Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Cement Waste Heat Utilization Equipment market size was valued at US\$ 3305 million in 2025 and is forecast to a readjusted size of US\$ 7316 million by 2032 with a CAGR of 12.0% during review period.

Cement Waste Heat Utilization Equipment refers to key equipment dedicated to waste heat recovery and power generation systems in new dry process cement clinker production lines. Its core distinguishing features from waste heat boilers used in steel, chemical, glass and other industries include: (1) the heat source is medium?low temperature exhaust gas (250?400?) from the kiln head (AQC) and kiln tail (SP/PH) with high dust concentration and large temperature fluctuations, requiring high wear resistance, anti?ash accumulation and thermal shock resistance; (2) boilers adopt vertical natural circulation structure (mainstream in China), with kiln head boilers typically featuring two heat exchange sections (steam section + hot water section) adapted to clinker cooler exhaust characteristics; (3) steam turbines are low?parameter, condensing or dual?pressure supplementary steam type, adapted to low?pressure, fluctuating steam parameters from waste heat boilers. Core equipment includes: kiln head AQC waste heat boiler, kiln tail SP/PH waste heat boiler, supplementary condensing steam turbine generator set, and DCS control system. Compared to ordinary industrial waste heat boilers, cement waste heat boilers must specifically address high?dust erosion on heating surfaces, low?temperature acid dew point corrosion, and operational shocks from cement line condition fluctuations, making structural complexity and manufacturing precision much higher than conventional waste heat recovery equipment.

Cement waste heat utilization equipment is one of the most technically demanding yet mature sub-segments in industrial waste heat recovery. The challenge: cement kiln exhaust contains extremely high dust loads (50-100 g/Nm³ at kiln head), large temperature fluctuations (>50%), and boilers must operate continuously for 3-5 years without cleaning. This forces AQC and SP boilers to adopt vertical natural circulation, built-in dust collectors, and finned tube wear-resistant heating surfaces – far more complex than waste heat boilers used in steel or chemical industries. Pricing: Equipment investment for a 5,000 t/d line (AQC boiler + SP boiler + turbine generator + DCS) is RMB 20-30 million (USD 2.8-4.2 million), with each boiler accounting for 25-30% of equipment cost and turbine generator 20-25%. Margins: Chinese leaders (Sinoma, Conch Kawasaki, Kaishan) achieve 20-25% gross margins through in-house equipment manufacturing and EPC; component suppliers (Crun, Jin Tong Ling) 15-20%; overseas ORC suppliers (Ormat, Turboden) command 35-45% due to technology monopoly. Downstream primary applications: new cement line builds account for 50-60% of equipment demand; brownfield retrofits 30-35%; low-temperature ORC retrofits 20% yoy). Incremental demand comes from: (1) new cement line builds in Southeast Asia, Middle East, Africa driving equipment exports; (2) single-pressure to dual-pressure upgrades in China (10-15% efficiency gain), creating a replacement market of RMB 3-5 billion/year; (3) ORC penetration in low-temperature sections, improving recovery rate by 8-12%. Upstream-downstream structure: upstream – high-temperature alloys and tube suppliers; downstream – cement producers (China National Building Material, Conch) and EPC contractors. Key bottlenecks: AQC boiler heating surface wear (overhaul every 3-5 years), SP boiler ash cleaning difficulty, and high ORC equipment cost (1.5-2x conventional Rankine cycle). Landscape: –Chinese integration leaders + international ORC technology giants?. Sinoma leads global market share; Conch Kawasaki produces 80 waste heat boilers/year, deploying 302 units; Kaishan holds unique high-efficiency reheat technology; Ormat and Turboden lead in ORC low-temperature segment; FLSmidth holds exclusive Kalina Cycle license. Uncertainties: cement overcapacity slowing new line investment; ORC cost reduction potentially replacing steam Rankine cycle; geopolitical risks for overseas EPC projects; cement industry profitability constraining retrofit capital expenditure. Conclusion: Cement waste heat utilization equipment represents the highest technical barrier and most demanding operating conditions in industrial waste heat recovery, with core value in achieving stable, efficient recovery under extreme high-dust, continuous operation. Structural features are saturated domestic market with large retrofit potential, overseas growth tied to infrastructure cycles, and stable replacement demand from short equipment life cycles. Leaders with in-house core equipment manufacturing and overseas EPC experience will continue expanding global market share over the next 3-5 years.

This report is a detailed and comprehensive analysis for global Cement Waste Heat Utilization Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Cement Waste Heat Utilization Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Cement Waste Heat Utilization Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Cement Waste Heat Utilization Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Cement Waste Heat Utilization Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Cement Waste Heat Utilization Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Cement Waste Heat Utilization Equipment market based on the following parameters - company overview, sales quantity, revenue,

price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sinoma Energy Conservation, Anhui Conch Kawasaki Engineering, Nanjing Kaishan Keneng, CITIC Heavy Industries, Ormat Technologies, Kawasaki Plant Systems, Turboden, FLSmidth, Sichuan Crun, Jin Tong Ling Technology Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Cement Waste Heat Utilization Equipment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

AQC Waste Heat Boiler (Kiln Head)

SP/PH Waste Heat Boiler (Kiln Tail)

Low?Parameter Steam Turbine

Generator & Auxiliaries

ORC Unit (for Low?Temperature Section)

Market segment by Efficiency

Low Efficiency (?32 kWh/t clinker)

Standard Efficiency (32?38 kWh/t clinker)

High Efficiency (38?42 kWh/t clinker)

Ultra?high Efficiency (>42 kWh/t clinker)

Market segment by Application

- Greenfield Cement Plant New Build
- Brownfield Retrofit & Upgrade
- Low?Temperature ORC Retrofitting
- Cement Plant Captive Power Generation
- Export to Local Grid
- Others

Major players covered

- Sinoma Energy Conservation
- Anhui Conch Kawasaki Engineering
- Nanjing Kaishan Keneng
- CITIC Heavy Industries
- Ormat Technologies
- Kawasaki Plant Systems
- Turboden
- FLSmidth
- Sichuan Crun
- Jin Tong Ling Technology Group

Thermax

ABB

Hangzhou Zhongneng Turbine Power

Shandong Juli Wangneng

Anhui Jierun Power

Hanwha Energy

Transparent Energy Systems

Zhengzhou Boiler

Tai'an Boiler Group

Jiangsu Yancheng Boiler

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Cement Waste Heat Utilization Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Cement Waste Heat Utilization Equipment, with price, sales quantity, revenue, and global market share of Cement Waste Heat Utilization Equipment from 2021 to 2026.

Chapter 3, the Cement Waste Heat Utilization Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Cement Waste Heat Utilization Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Cement Waste Heat Utilization Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Cement Waste Heat Utilization Equipment.

Chapter 14 and 15, to describe Cement Waste Heat Utilization Equipment sales channel, distributors, customers, research findings and conclusion.

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