

Global Cement Waste Heat Utilization Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cement Waste Heat Utilization Equipment market size is expected to reach \$ 7316 million by 2032, rising at a market growth of 12.0% CAGR during the forecast period (2026-2032).

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°C) 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-pressure, 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 studies the global Cement Waste Heat Utilization Equipment production,

demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cement Waste Heat Utilization Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Cement Waste Heat Utilization Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cement Waste Heat Utilization Equipment total production and demand, 2021-2032, (Units)

Global Cement Waste Heat Utilization Equipment total production value, 2021-2032, (USD Million)

Global Cement Waste Heat Utilization Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Cement Waste Heat Utilization Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Cement Waste Heat Utilization Equipment domestic production, consumption, key domestic manufacturers and share

Global Cement Waste Heat Utilization Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Cement Waste Heat Utilization Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Cement Waste Heat Utilization Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Cement Waste Heat Utilization Equipment market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Cement Waste Heat Utilization Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Cement Waste Heat Utilization Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cement Waste Heat Utilization Equipment Market, Segmentation 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)

Global Cement Waste Heat Utilization Equipment Market, Segmentation 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)

Global Cement Waste Heat Utilization Equipment Market, Segmentation by Application:

Greenfield Cement Plant New Build

Brownfield Retrofit & Upgrade

Low-Temperature ORC Retrofitting

Cement Plant Captive Power Generation

Export to Local Grid

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Cement Waste Heat Utilization Equipment market?
2. What is the demand of the global Cement Waste Heat Utilization Equipment market?
3. What is the year over year growth of the global Cement Waste Heat Utilization Equipment market?
4. What is the production and production value of the global Cement Waste Heat

Utilization Equipment market?

5. Who are the key producers in the global Cement Waste Heat Utilization Equipment market?

6. What are the growth factors driving the market demand?

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