

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

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Abstracts

The global Cement Waste Heat Utilization market size is expected to reach \$ 38517 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

Cement waste heat utilization refers to the capture and conversion of medium-to-low temperature exhaust waste heat (300-400°C from preheater exhaust, 200-350°C from clinker cooler) generated during new dry process cement clinker production into electricity, heat, or other secondary energy through dedicated waste heat recovery systems. The core product is the waste heat power generation system, consisting of waste heat boilers (kiln inlet SP boiler, kiln outlet AQC boiler), steam turbines, generators, auxiliary equipment, and control systems. Cement waste heat utilization includes captive power generation (grid-connected or self-consumption), cross-industrial cogeneration for heating, agricultural greenhouse heating, and other pathways. The technology consumes no additional fuel and generates no extra carbon emissions, reducing comprehensive energy consumption per ton of clinker by 8-12 kgce and lowering plant self-power consumption by 25-35%, offering both economic and environmental benefits. Utilization models have expanded from single-site power generation toward source-grid-load-storage integration, waste-heat-coupled carbon capture, agricultural heating, and other diversified applications.

Cement waste heat utilization is one of the most mature yet still underestimated segments in industrial energy efficiency. The technology converts 300-400°C preheater exhaust and 200-350°C clinker cooler hot air into electricity or heat, achieving 38-42 kWh per ton of clinker, reducing comprehensive energy consumption by 8-12 kgce/t, with no additional fuel or carbon emissions. Pricing: EPC investment for a 5,000 t/d line is RMB 50-80 million, with generation cost around RMB 0.15-0.20/kWh ? about

one-third to one-half of industrial grid tariffs. Payback period is typically 3-5 years. Margins vary by business model: EPC gross margin 15-20%; core equipment (boilers, turbines) 25-30%; BOT (Build-Operate-Transfer) model can exceed 40%, offering utility-like stable cash flow. Downstream: captive power generation (self-consumption) accounts for ~70% of installed capacity; grid sales 10-15%; cross-sector heating (district heating, agricultural greenhouses) 5-10%; carbon capture integration and green microgrids below 5% but fastest-growing. Incremental demand comes from: (1) retrofit of older single-pressure systems to dual-pressure/reheat, increasing output 15-20%, creating a replacement equipment market of RMB 3-5 billion/year in China; (2) new cement lines in Southeast Asia, Middle East, Africa driving EPC exports; (3) cross-sector synergy - Conch's waste-heat-heated greenhouses produce 3x tomato yield; (4) carbon capture integration - waste heat provides regeneration energy for amine-based capture, reducing energy penalty by ~30%. Upstream-downstream structure: upstream - boiler, turbine, ORC unit manufacturers (Sichuan Crun, CITIC Heavy, Ormat, Turboden); midstream - system integrators and EPC contractors (Sinoma Energy, Conch Kawasaki, Nanjing Kaishan, Kawasaki, FLSmidth); downstream - cement producers (China National Building Material, Conch) and cross-sector heat users. The landscape is a duopoly of Chinese integration leaders + international ORC technology giants. Sinoma Energy has the largest global market share (~30% in China), with strong Belt & Road presence; Ormat and Turboden lead in low-temperature ORC technology. ESG perspective: Cement accounts for ~13% of China's CO₂ emissions. Waste heat power saves ~10,000 tCO₂/year per line (0.85 tCO₂/MWh). After CCER restart, carbon credits can generate additional annual revenue of RMB 0.5-1.0 million per line. Replacing coal-fired heating with waste heat reduces PM_{2.5} and SO₂, supporting green factory certification, green loans, and improved ESG ratings. Uncertainties include: (1) cement capacity utilization volatility affecting waste heat generation; (2) carbon market price and CCER methodology updates; (3) ORC cost reduction potentially accelerating substitution of steam Rankine cycle; (4) geopolitical risks for overseas EPC projects. Conclusion: Cement waste heat utilization has evolved from a 'nice-to-have' energy-saving retrofit into a must-have infrastructure for cost reduction, carbon compliance, ESG improvement, and cross-sector synergy. Core drivers are carbon peaking policies, rising industrial electricity tariffs, and circular economy incentives. Structural features are high penetration with large retrofit potential, Chinese leaders dominating domestic while overseas growth awaits, and technology mature but ORC gaining share. Over the next five years, integrators with BOT capabilities, cross-sector heating experience, and carbon asset development skills will capture the greatest value.

This report studies the global Cement Waste Heat Utilization production, demand, key

manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cement Waste Heat Utilization 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 that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Cement Waste Heat Utilization 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, Sichuan Crun, Jin Tong Ling Technology Group, Ormat Technologies, Kawasaki Plant Systems, Turboden, FLSmidth, 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 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 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cement Waste Heat Utilization Market, Segmentation by Type:

Single?Pressure Steam Rankine Cycle

Dual?Pressure / Reheat Steam Rankine Cycle

Organic Rankine Cycle (ORC)

Kalina Cycle

Integrated CHP / Cross?Sector Heating

Global Cement Waste Heat Utilization Market, Segmentation by Temperature:

300?400? Kiln Tail (Preheater) Exhaust Gas

200?350? Kiln Head (Clinker Cooler) Hot Air

Below 200? Low Temperature Exhaust

Global Cement Waste Heat Utilization Market, Segmentation by Application:

Captive Power Generation (On?site)

Grid?Connected Power Sales

Cross?Sector District Heating

Agricultural Greenhouse Heating

Carbon Capture Integration

Industrial Green Microgrid

Others

Companies Profiled:

Sinoma Energy Conservation

Anhui Conch Kawasaki Engineering

Nanjing Kaishan Keneng

CITIC Heavy Industries

Sichuan Crun

Jin Tong Ling Technology Group

Ormat Technologies

Kawasaki Plant Systems

Turboden

FLSmidth

Siemens Energy

ABB

GE Gas Power

Thermax

Transparent Energy Systems

China National Building Material Group

Anhui Conch Cement

Key Questions Answered:

1. How big is the global Cement Waste Heat Utilization market?
2. What is the demand of the global Cement Waste Heat Utilization market?
3. What is the year over year growth of the global Cement Waste Heat Utilization market?
4. What is the production and production value of the global Cement Waste Heat Utilization market?
5. Who are the key producers in the global Cement Waste Heat Utilization market?
6. What are the growth factors driving the market demand?

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