

# Global Dry Flue Gas Purification Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Dry Flue Gas Purification Equipment market size is expected to reach \$ 9756 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

Dry flue gas cleaning equipment refers to industrial systems and devices that remove pollutants from flue gases generated by industrial combustion processes using dry processes. The core characteristic lies in the absence or minimal addition of water throughout the entire purification process, with flue gas temperature maintained relatively stable before and after treatment, thereby avoiding the wastewater treatment issues associated with wet processes. The research scope covers the complete process equipment chain from sorbent injection and absorption reaction to particulate separation. Major product configurations include circulating fluidized bed dry absorbers, spray dryer absorbers, dry sorbent injection systems, activated carbon injection systems, and supporting baghouse filters. The mainstream technological routes comprise circulating fluidized bed dry scrubbing, spray dryer absorption, and dry sorbent injection. Key technical specifications include inlet flue gas temperature, inlet sulfur dioxide concentration, desulfurization efficiency, outlet particulate concentration, and system pressure drop. The critical functions of this equipment are the efficient removal of acid gases including sulfur dioxide, hydrogen chloride, and hydrogen fluoride, with simultaneous co removal of heavy metals, dioxins, and particulate matter. Under optimized configurations, desulfurization efficiency can exceed 95% with outlet particulate concentration controlled below 10 milligrams per standard cubic meter. Primary applications cover flue gas treatment for coal fired power generation, iron and steel sintering, cement kilns, waste to energy facilities, glass furnaces, and industrial boilers. The average gross margin in the global dry flue gas cleaning equipment industry for 2025 is estimated between 22% and 28%. Typical system pricing varies by

application scenario: small scale industrial boiler and kiln applications range from 0.3 to 2 million US dollars per unit; medium scale waste to energy and iron and steel sintering applications range from 3 to 15 million US dollars per unit; large scale coal fired power plant ultra low emission applications range from 20 to 60 million US dollars per unit. Actual prices are significantly influenced by flue gas treatment capacity, inlet pollutant concentrations, applicable emission standards, and system complexity.

The upstream segment of the global dry flue gas cleaning equipment industry primarily consists of suppliers of steel materials, filter media, sorbents, fans, pumps, and valves, while the midstream segment comprises core equipment manufacturers and system integrators. The downstream segment serves end users including coal fired power plants, iron and steel sintering facilities, cement kilns, waste to energy incineration plants, and industrial boilers. Raw material price fluctuations in the upstream segment significantly impact equipment manufacturing costs, particularly the supply chain stability of specialty steel grades and high grade filter media, which directly determines equipment service life and operational efficiency. The midstream segment exhibits a multi layered competitive structure, with leading manufacturers holding core patents, complete product portfolios, and large scale project track records dominating the global market share. A long tail of small and medium sized specialized manufacturers focusing on regional markets or specific industrial scenarios constitutes the remaining supply base. End user purchasing decisions are shifting from initial capital expenditure toward total lifecycle operation and maintenance costs and emission compliance reliability, driving midstream manufacturers to transform from equipment suppliers to integrated solution providers.

The global competitive landscape shows a three tier structure where European, American, and Japanese companies dominate the high end market, Chinese manufacturers lead in production capacity scale, and regional players fill local demand. From a technology distribution perspective, circulating fluidized bed dry scrubbing maintains a clear advantage in large coal fired power units, spray dryer absorption holds significant share in the waste to energy market, and dry sorbent injection offers flexible configuration with lower investment thresholds suitable for small to medium scale installations and retrofit projects. Recent merger and acquisition activity has been notable, with several traditional European environmental brands refocusing their core dry technology businesses through asset restructuring, while Chinese leading manufacturers pursue horizontal acquisitions to consolidate regional market resources and expand overseas channels. New product launches concentrate on three directions including compact design, low energy consumption operation, and intelligent control, with multiple manufacturers introducing modular dry cleaning units targeting small and

medium scale industrial kilns. This represents an attempt to extend market coverage from large centralized heat sources toward decentralized application scenarios.

From a policy perspective, major economies continue tightening emission limits for pollutants in industrial flue gas including sulfur dioxide, nitrogen oxides, particulate matter, dioxins, and heavy metals, pushing dry cleaning equipment to upgrade toward multi pollutant synergistic removal. Following the completion of ultra low emission retrofits for coal fired power plants, China is shifting policy focus toward deep treatment of non power sectors including steel, cement, and glass, opening new incremental space for dry cleaning equipment. Revisions to the European Union Industrial Emissions Directive and tightening environmental standards in India and Southeast Asian countries likewise serve as important demand catalysts. From a development outlook perspective, the global dry cleaning equipment market will maintain steady positive growth, supported by industrialization processes in emerging economies and ongoing retrofit upgrades in the Chinese installed base. Large scale deployment of intelligent operation and maintenance systems, sorbent injection optimization control, and remote diagnostic platforms is driving equipment efficiency improvements. The cost advantage of Chinese equipment manufacturers in the global mid tier market continues expanding, accelerating integration into regional supply chains through local assembly and technical cooperation. Traditional European manufacturers concentrate further on core patent equipment exports and high value added technical services. Overall, leading manufacturers possessing high technical barriers, complete product portfolios, and global service capabilities will continue benefiting from ongoing industry consolidation.

This report studies the global Dry Flue Gas Purification Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dry Flue Gas Purification 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 Dry Flue Gas Purification Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dry Flue Gas Purification Equipment total production and demand, 2021-2032, (Units)

Global Dry Flue Gas Purification Equipment total production value, 2021-2032, (USD Million)

Global Dry Flue Gas Purification Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Dry Flue Gas Purification Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Dry Flue Gas Purification Equipment domestic production, consumption, key domestic manufacturers and share

Global Dry Flue Gas Purification Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Dry Flue Gas Purification Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Dry Flue Gas Purification Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Dry Flue Gas Purification 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 Mitsubishi Power, Bawey, Doosan Lentjes, ANDRITZ, FLSmidth, Hamon, Valmet, Hitachi Zosen Inova, Takuma, JFE Engineering, 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 Dry Flue Gas Purification Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Dry Flue Gas Purification Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Dry Flue Gas Purification Equipment Market, Segmentation by Type:

Dry Desulfurization System

Dry Deacidification System

Particulate Removal System

Heavy Metal Removal System

Others

#### Global Dry Flue Gas Purification Equipment Market, Segmentation by Primary Function:

Circulating Fluidized Bed Dry Scrubbing

Spray Dryer Absorber

Dry Sorbent Injection

Circulating Dry Scrubber with Integrated Baghouse

Others

## Global Dry Flue Gas Purification Equipment Market, Segmentation by Application:

Waste to Energy WtE

Cement Kiln

Steel Sintering Plant

Industrial Boiler

Biomass Power Plant

Non Ferrous Smelting

Others

## Companies Profiled:

Mitsubishi Power

Bawey

Doosan Lentjes

ANDRITZ

FLSmidth

Hamon

Valmet

Hitachi Zosen Inova

Takuma

JFE Engineering

Thermax

Dukang

Lodge Cottrell

RAFAKO S.A.

LAB SA

DrySoTec GmbH

BoldEco Environment

Verantis

Fujian Longking Environmental Protection Co., Ltd.

Zhejiang Feida Environmental Technology Co., Ltd.

SPIC Yuanda Environmental Protection Co., Ltd. (State Power Investment Corp.)

Guoneng Longyuan Environmental Protection Co., Ltd.

Beijing AVIC Taida Environmental Technology Co., Ltd.

Beijing Qingxin Environment Technology Co., Ltd.

Jiangsu New Century Jiangnan Environmental Protection Co., Ltd.

DP CleanTech

Macrotek Inc.

Kawasaki Heavy Industries

Key Questions Answered:

1. How big is the global Dry Flue Gas Purification Equipment market?
2. What is the demand of the global Dry Flue Gas Purification Equipment market?
3. What is the year over year growth of the global Dry Flue Gas Purification Equipment market?
4. What is the production and production value of the global Dry Flue Gas Purification Equipment market?
5. Who are the key producers in the global Dry Flue Gas Purification Equipment market?
6. What are the growth factors driving the market demand?

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