

Global Exhaust Gas Heat Recovery System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Exhaust Gas Heat Recovery System market size is expected to reach \$ 2703 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

In 2025, global Exhaust Gas Heat Recovery System production reached approximately 27,000 Units. The average price is approximately \$67,000. Exhaust Gas Heat Recovery System refer to systematic engineering solutions that recover the waste heat carried by high-temperature exhaust gases emitted during the operation of engines, gas turbines, boilers, industrial kilns, or ship main engines, and convert it into reusable thermal or electrical energy through heat exchange and energy conversion devices.

Gross Profit Margin Level

The gross profit margin of waste heat recovery systems is essentially determined by 'technological content/project integration level' rather than simply material costs. In the automotive sector, systems are often embedded in emission and thermal management architectures, with competition focusing on integration capabilities, reliability verification, and large-scale supply. Gross profit is more influenced by OEM bargaining power, platform reuse rates, and quality costs. In the industrial and marine sectors, the profit structure is more like 'high-temperature heat exchange equipment + engineering delivery.' Key variables determining gross profit are corrosion-resistant and high-temperature-resistant materials and manufacturing processes (finned tubes, corrosion-resistant alloys, ash/clogging control), system design capabilities (back pressure, heat exchange efficiency, bypass and safety), and on-site construction and performance guarantee risks. Generally, the gross profit margin of standardized heat exchangers/economizers is relatively 'neutral.' However, when solutions are upgraded to ORC power generation skid-mounted systems, combined heat and power system-level integration, or include long-term operation and maintenance/energy sharing, the product shifts from 'equipment delivery' to 'energy performance delivery,' significantly

raising the gross profit ceiling. Correspondingly, project cycles, financing, and performance commitments will also place companies under stronger engineering and cash flow management constraints.

Industry Drivers

The core driving forces of the industry come from two main lines: First, 'energy efficiency and carbon constraints'?waste heat recovery directly converts heat emitted into the environment into usable energy, resulting in fuel savings and reduced CO₂ emissions. This is the hard logic behind the continuous investment in the industrial and marine sectors; many manufacturers also use 'fuel saving, emission reduction, and rapid payback period' as product selling points. Second, 'regulations and system upgrades': In the automotive sector, the tightening of fuel economy and emission regulations has prompted EHRs (including ORC, cogeneration, etc.) to gain opportunities for adoption in more efficient powertrains; while in the industrial sector, high-energy-consuming industries (steel, cement, chemical, etc.) face pressure from energy consumption targets, ESG, and carbon costs, viewing waste heat recovery as a 'certain cost reduction' engineering tool. At the same time, modular skid-mounted systems, digital operation and maintenance, and more resistant to dirt and clogging heat exchange structures are lowering the barriers to retrofitting, increasing the proportion of existing equipment that is 'modifiable, usable, and verifiable,' thereby expanding the market from 'new construction' to a larger 'existing equipment upgrade.' This report studies the global Exhaust Gas Heat Recovery System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Exhaust Gas Heat Recovery System 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 Exhaust Gas Heat Recovery System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Exhaust Gas Heat Recovery System total production and demand, 2021-2032, (Units)

Global Exhaust Gas Heat Recovery System total production value, 2021-2032, (USD Million)

Global Exhaust Gas Heat Recovery System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Exhaust Gas Heat Recovery System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Exhaust Gas Heat Recovery System domestic production, consumption, key domestic manufacturers and share

Global Exhaust Gas Heat Recovery System production by manufacturer, production,

price, value and market share 2021-2026, (USD Million) & (Units)

Global Exhaust Gas Heat Recovery System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Exhaust Gas Heat Recovery System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Exhaust Gas Heat Recovery System 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 BorgWarner, Continental, Denso, Valeo, MAHLE, Forvia?Faurecia?, Garrett Motion, Aisin, Marelli, Dana, 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 Exhaust Gas Heat Recovery System 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 Exhaust Gas Heat Recovery System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Exhaust Gas Heat Recovery System Market, Segmentation by Type:

High-Temperature Waste Heat Recovery System

Medium-Temperature Waste Heat Recovery System

Low-Temperature Waste Heat Recovery System

Global Exhaust Gas Heat Recovery System Market, Segmentation by Recycling Methods:

Direct Recycling System

Indirect Recycling System

Combined Recycling System

Global Exhaust Gas Heat Recovery System Market, Segmentation by Core Component Types:

Heat Exchanger Type System

Turbine Type System

Regenerative Thermal System

Others

Global Exhaust Gas Heat Recovery System Market, Segmentation by Application:

Industrial Manufacturing

Transportation

Construction and Municipal Engineering

Others

Companies Profiled:

BorgWarner

Continental

Denso

Valeo

MAHLE

Forvia?Faurecia?

Garrett Motion

Aisin

Marelli

Dana

Tenneco

Schaeffler

IHI Corporation

Katcon

CDTi Advanced Materials

Bosal

Hitachi

Siemens

General Electric?GE?

ABB

Mitsubishi Heavy Industries?MHI?

Thermax

Alfa Laval

Key Questions Answered:

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

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