

# Global Industrial Air Preheater Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Industrial Air Preheater market size is expected to reach \$ 3848 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

An industrial air preheater is a heat exchange device used in industrial boilers, furnaces, and power generation systems to recover waste heat from flue gases and transfer it to incoming combustion air, thereby improving thermal efficiency, reducing fuel consumption, lowering emissions, and enhancing overall energy utilization in thermal processes.

The industrial air preheater industry chain begins upstream with raw material suppliers providing steel, alloys, ceramics, and heat-resistant coatings along with components such as fans, seals, and structural frameworks, followed by midstream manufacturers and engineering companies that design, fabricate, and assemble air preheaters integrated into boilers and thermal systems, while downstream includes power plants, cement factories, steel mills, chemical industries, and waste incineration facilities that install and operate these systems, supported by EPC contractors, maintenance service providers, and energy efficiency solution firms that ensure long-term operational performance and emissions compliance.

Current and planned industrial air preheater projects include capacity expansion in coal-fired and ultra-supercritical power plants in Asia, modernization of cement kiln systems in India and Southeast Asia, retrofitting of steel and metallurgy plants in China and Europe for energy efficiency improvements, deployment of waste-to-energy incineration plants in urban regions, and upgrades in chemical processing facilities in North America, alongside EPC-driven boiler efficiency enhancement projects and carbon reduction initiatives that drive demand for high-performance regenerative and rotary air

preheaters across global industrial sectors.

2025 Global Market sales Volume: 52,000 units. Average Global Market Price: USD 48,000/unit. Market Average Gross Profit Margin: 32%.

The industrial air preheater market is experiencing steady growth driven by increasing demand for energy efficiency and stricter environmental regulations across heavy industries. These systems play a critical role in improving boiler efficiency by recovering waste heat, which reduces fuel consumption and greenhouse gas emissions. The power generation sector remains the largest application area, particularly coal-fired and thermal power plants undergoing efficiency upgrades and emission reduction retrofits. Cement and steel industries are also significant contributors due to their high-temperature process requirements.

Regionally, Asia-Pacific dominates the market, led by China and India, where rapid industrialization and large-scale infrastructure development continue to drive demand. Europe focuses on modernization and decarbonization projects, while North America emphasizes retrofitting and compliance with environmental regulations. Emerging economies in the Middle East and Africa are increasingly adopting air preheaters as part of industrial expansion projects.

Opportunities in the market are strongly linked to global energy transition trends, carbon reduction policies, and the adoption of waste heat recovery technologies. However, challenges include high initial installation costs, maintenance complexity, and operational issues such as fouling and corrosion. Market trends indicate increasing adoption of advanced materials, corrosion-resistant coatings, and digital monitoring systems for predictive maintenance. There is also a shift toward high-efficiency regenerative designs and integration with smart industrial systems.

Competitive characteristics show a moderately consolidated market dominated by established thermal engineering companies and boiler manufacturers, with competition focused on efficiency performance, durability, and lifecycle cost rather than price alone. Companies are investing in R&D, CFD-based design optimization, and material innovation to improve heat transfer efficiency and reduce emissions.

This report studies the global Industrial Air Preheater production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Industrial

Air Preheater 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 Industrial Air Preheater that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Industrial Air Preheater total production and demand, 2021-2032, (K Units)

Global Industrial Air Preheater total production value, 2021-2032, (USD Million)

Global Industrial Air Preheater production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Industrial Air Preheater consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Industrial Air Preheater domestic production, consumption, key domestic manufacturers and share

Global Industrial Air Preheater production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Industrial Air Preheater production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Industrial Air Preheater production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Industrial Air Preheater 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 Thermowatt, Kelvion Holding GmbH, LJUNGSTRÖM, Chart Industries, Clyde Bergemann, Shandong Hengtao Group, Harbin Boiler Company, Doright Co., Ltd, Shanghai Dongrun Heat Exchange Equipment Co, Wecergy, 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 Industrial Air Preheater market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Industrial Air Preheater Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Industrial Air Preheater Market, Segmentation by Type:

Plate

Tubular

Rotary

#### Global Industrial Air Preheater Market, Segmentation by Heat Transfer Method:

Indirect Heat Transfer Preheater

Direct Contact Preheater

Hybrid Heat Transfer Preheater

Others

### Global Industrial Air Preheater Market, Segmentation by Material Type:

Carbon Steel

Enamel-Coated

Corrosion-Resistant Alloy

Ceramic Composite

### Global Industrial Air Preheater Market, Segmentation by Application:

Power & Energy

Chemical & Petrochemical

Metallurgical & Industrial Furnaces

Waste Treatment

Others

### Companies Profiled:

Thermowatt

Kelvion Holding GmbH

LJUNGSTRÖM

Chart Industries

Clyde Bergemann

Shandong Hengtao Group

Harbin Boiler Company

Doright Co., Ltd

Shanghai Dongrun Heat Exchange Equipment Co

Wecergy

SHPHE

Shanghai Electric

Wuxi Weishengtai Thermal Energy Equipment Co

**Key Questions Answered:**

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

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