

Global Industrial Air Preheater Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Industrial Air Preheater market size was valued at US\$ 2568 million in 2025 and is forecast to a readjusted size of US\$ 3848 million by 2032 with a CAGR of 6.1% during review period.

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 is a detailed and comprehensive analysis for global Industrial Air Preheater market. Both quantitative and qualitative analyses are presented by manufacturers, by

region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Industrial Air Preheater market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global Industrial Air Preheater market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global Industrial Air Preheater market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global Industrial Air Preheater market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Industrial Air Preheater
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Industrial Air Preheater market based on the following parameters - company overview, sales quantity, revenue, 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, Doughty 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.

Market Segmentation

Industrial Air Preheater market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Plate

Tubular

Rotary

Market segment by Heat Transfer Method

Indirect Heat Transfer Preheater

Direct Contact Preheater

Hybrid Heat Transfer Preheater

Others

Market segment by Material Type

Carbon Steel

Enamel-Coated

Corrosion-Resistant Alloy

Ceramic Composite

Market segment by Application

Power & Energy

Chemical & Petrochemical

Metallurgical & Industrial Furnaces

Waste Treatment

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Industrial Air Preheater product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Industrial Air Preheater, with price, sales quantity, revenue, and global market share of Industrial Air Preheater from 2021 to 2026.

Chapter 3, the Industrial Air Preheater competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Industrial Air Preheater breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market

share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Industrial Air Preheater market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Industrial Air Preheater.

Chapter 14 and 15, to describe Industrial Air Preheater sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Industrial Air Preheater Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Plate

1.3.3 Tubular

1.3.4 Rotary

1.4 Market Analysis by Heat Transfer Method

1.4.1 Overview: Global Industrial Air Preheater Consumption Value by Heat Transfer Method: 2021 Versus 2025 Versus 2032

1.4.2 Indirect Heat Transfer Preheater

1.4.3 Direct Contact Preheater

1.4.4 Hybrid Heat Transfer Preheater

1.4.5 Others

1.5 Market Analysis by Material Type

1.5.1 Overview: Global Industrial Air Preheater Consumption Value by Material Type: 2021 Versus 2025 Versus 2032

1.5.2 Carbon Steel

1.5.3 Enamel-Coated

1.5.4 Corrosion-Resistant Alloy

1.5.5 Ceramic Composite

1.6 Market Analysis by Application

1.6.1 Overview: Global Industrial Air Preheater Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Power & Energy

1.6.3 Chemical & Petrochemical

1.6.4 Metallurgical & Industrial Furnaces

1.6.5 Waste Treatment

1.6.6 Others

1.7 Global Industrial Air Preheater Market Size & Forecast

1.7.1 Global Industrial Air Preheater Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Industrial Air Preheater Sales Quantity (2021-2032)

1.7.3 Global Industrial Air Preheater Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Thermowatt

2.1.1 Thermowatt Details

2.1.2 Thermowatt Major Business

2.1.3 Thermowatt Industrial Air Preheater Product and Services

2.1.4 Thermowatt Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Thermowatt Recent Developments/Updates

2.2 Kelvion Holding GmbH

2.2.1 Kelvion Holding GmbH Details

2.2.2 Kelvion Holding GmbH Major Business

2.2.3 Kelvion Holding GmbH Industrial Air Preheater Product and Services

2.2.4 Kelvion Holding GmbH Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Kelvion Holding GmbH Recent Developments/Updates

2.3 LJUNGSTR?M

2.3.1 LJUNGSTR?M Details

2.3.2 LJUNGSTR?M Major Business

2.3.3 LJUNGSTR?M Industrial Air Preheater Product and Services

2.3.4 LJUNGSTR?M Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 LJUNGSTR?M Recent Developments/Updates

2.4 Chart Industries

2.4.1 Chart Industries Details

2.4.2 Chart Industries Major Business

2.4.3 Chart Industries Industrial Air Preheater Product and Services

2.4.4 Chart Industries Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Chart Industries Recent Developments/Updates

2.5 Clyde Bergemann

2.5.1 Clyde Bergemann Details

2.5.2 Clyde Bergemann Major Business

2.5.3 Clyde Bergemann Industrial Air Preheater Product and Services

2.5.4 Clyde Bergemann Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Clyde Bergemann Recent Developments/Updates

2.6 Shandong Hengtao Group

2.6.1 Shandong Hengtao Group Details

- 2.6.2 Shandong Hengtao Group Major Business
- 2.6.3 Shandong Hengtao Group Industrial Air Preheater Product and Services
- 2.6.4 Shandong Hengtao Group Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.6.5 Shandong Hengtao Group Recent Developments/Updates
- 2.7 Harbin Boiler Company
 - 2.7.1 Harbin Boiler Company Details
 - 2.7.2 Harbin Boiler Company Major Business
 - 2.7.3 Harbin Boiler Company Industrial Air Preheater Product and Services
 - 2.7.4 Harbin Boiler Company Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Harbin Boiler Company Recent Developments/Updates
- 2.8 Doright Co., Ltd
 - 2.8.1 Doright Co., Ltd Details
 - 2.8.2 Doright Co., Ltd Major Business
 - 2.8.3 Doright Co., Ltd Industrial Air Preheater Product and Services
 - 2.8.4 Doright Co., Ltd Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Doright Co., Ltd Recent Developments/Updates
- 2.9 Shanghai Dongrun Heat Exchange Equipment Co
 - 2.9.1 Shanghai Dongrun Heat Exchange Equipment Co Details
 - 2.9.2 Shanghai Dongrun Heat Exchange Equipment Co Major Business
 - 2.9.3 Shanghai Dongrun Heat Exchange Equipment Co Industrial Air Preheater Product and Services
 - 2.9.4 Shanghai Dongrun Heat Exchange Equipment Co Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Shanghai Dongrun Heat Exchange Equipment Co Recent Developments/Updates
- 2.10 Wecergy
 - 2.10.1 Wecergy Details
 - 2.10.2 Wecergy Major Business
 - 2.10.3 Wecergy Industrial Air Preheater Product and Services
 - 2.10.4 Wecergy Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Wecergy Recent Developments/Updates
- 2.11 SHPHE
 - 2.11.1 SHPHE Details
 - 2.11.2 SHPHE Major Business
 - 2.11.3 SHPHE Industrial Air Preheater Product and Services

2.11.4 SHPHE Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 SHPHE Recent Developments/Updates

2.12 Shanghai Electric

2.12.1 Shanghai Electric Details

2.12.2 Shanghai Electric Major Business

2.12.3 Shanghai Electric Industrial Air Preheater Product and Services

2.12.4 Shanghai Electric Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Shanghai Electric Recent Developments/Updates

2.13 Wuxi Weishengtai Thermal Energy Equipment Co

2.13.1 Wuxi Weishengtai Thermal Energy Equipment Co Details

2.13.2 Wuxi Weishengtai Thermal Energy Equipment Co Major Business

2.13.3 Wuxi Weishengtai Thermal Energy Equipment Co Industrial Air Preheater Product and Services

2.13.4 Wuxi Weishengtai Thermal Energy Equipment Co Industrial Air Preheater Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Wuxi Weishengtai Thermal Energy Equipment Co Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: INDUSTRIAL AIR PREHEATER BY MANUFACTURER

3.1 Global Industrial Air Preheater Sales Quantity by Manufacturer (2021-2026)

3.2 Global Industrial Air Preheater Revenue by Manufacturer (2021-2026)

3.3 Global Industrial Air Preheater Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Industrial Air Preheater by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Industrial Air Preheater Manufacturer Market Share in 2025

3.4.3 Top 6 Industrial Air Preheater Manufacturer Market Share in 2025

3.5 Industrial Air Preheater Market: Overall Company Footprint Analysis

3.5.1 Industrial Air Preheater Market: Region Footprint

3.5.2 Industrial Air Preheater Market: Company Product Type Footprint

3.5.3 Industrial Air Preheater Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Industrial Air Preheater Market Size by Region

- 4.1.1 Global Industrial Air Preheater Sales Quantity by Region (2021-2032)
- 4.1.2 Global Industrial Air Preheater Consumption Value by Region (2021-2032)
- 4.1.3 Global Industrial Air Preheater Average Price by Region (2021-2032)

4.2 North America Industrial Air Preheater Consumption Value (2021-2032)

4.3 Europe Industrial Air Preheater Consumption Value (2021-2032)

4.4 Asia-Pacific Industrial Air Preheater Consumption Value (2021-2032)

4.5 South America Industrial Air Preheater Consumption Value (2021-2032)

4.6 Middle East & Africa Industrial Air Preheater Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Industrial Air Preheater Sales Quantity by Type (2021-2032)

5.2 Global Industrial Air Preheater Consumption Value by Type (2021-2032)

5.3 Global Industrial Air Preheater Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Industrial Air Preheater Sales Quantity by Application (2021-2032)

6.2 Global Industrial Air Preheater Consumption Value by Application (2021-2032)

6.3 Global Industrial Air Preheater Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Industrial Air Preheater Sales Quantity by Type (2021-2032)

7.2 North America Industrial Air Preheater Sales Quantity by Application (2021-2032)

7.3 North America Industrial Air Preheater Market Size by Country

7.3.1 North America Industrial Air Preheater Sales Quantity by Country (2021-2032)

7.3.2 North America Industrial Air Preheater Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Industrial Air Preheater Sales Quantity by Type (2021-2032)

8.2 Europe Industrial Air Preheater Sales Quantity by Application (2021-2032)

8.3 Europe Industrial Air Preheater Market Size by Country

- 8.3.1 Europe Industrial Air Preheater Sales Quantity by Country (2021-2032)
- 8.3.2 Europe Industrial Air Preheater Consumption Value by Country (2021-2032)
- 8.3.3 Germany Market Size and Forecast (2021-2032)
- 8.3.4 France Market Size and Forecast (2021-2032)
- 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
- 8.3.6 Russia Market Size and Forecast (2021-2032)
- 8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific Industrial Air Preheater Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Industrial Air Preheater Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Industrial Air Preheater Market Size by Region
 - 9.3.1 Asia-Pacific Industrial Air Preheater Sales Quantity by Region (2021-2032)
 - 9.3.2 Asia-Pacific Industrial Air Preheater Consumption Value by Region (2021-2032)
 - 9.3.3 China Market Size and Forecast (2021-2032)
 - 9.3.4 Japan Market Size and Forecast (2021-2032)
 - 9.3.5 South Korea Market Size and Forecast (2021-2032)
 - 9.3.6 India Market Size and Forecast (2021-2032)
 - 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
 - 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Industrial Air Preheater Sales Quantity by Type (2021-2032)
- 10.2 South America Industrial Air Preheater Sales Quantity by Application (2021-2032)
- 10.3 South America Industrial Air Preheater Market Size by Country
 - 10.3.1 South America Industrial Air Preheater Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Industrial Air Preheater Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Industrial Air Preheater Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Industrial Air Preheater Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Industrial Air Preheater Market Size by Country

11.3.1 Middle East & Africa Industrial Air Preheater Sales Quantity by Country
(2021-2032)

11.3.2 Middle East & Africa Industrial Air Preheater Consumption Value by Country
(2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Industrial Air Preheater Market Drivers

12.2 Industrial Air Preheater Market Restraints

12.3 Industrial Air Preheater Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Industrial Air Preheater and Key Manufacturers

13.2 Manufacturing Costs Percentage of Industrial Air Preheater

13.3 Industrial Air Preheater Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Industrial Air Preheater Typical Distributors

14.3 Industrial Air Preheater Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Industrial Air Preheater Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Industrial Air Preheater Consumption Value by Heat Transfer Method, (USD Million), 2021 & 2025 & 2032

Table 3. Global Industrial Air Preheater Consumption Value by Material Type, (USD Million), 2021 & 2025 & 2032

Table 4. Global Industrial Air Preheater Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Thermowatt Basic Information, Manufacturing Base and Competitors

Table 6. Thermowatt Major Business

Table 7. Thermowatt Industrial Air Preheater Product and Services

Table 8. Thermowatt Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Thermowatt Recent Developments/Updates

Table 10. Kelvion Holding GmbH Basic Information, Manufacturing Base and Competitors

Table 11. Kelvion Holding GmbH Major Business

Table 12. Kelvion Holding GmbH Industrial Air Preheater Product and Services

Table 13. Kelvion Holding GmbH Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Kelvion Holding GmbH Recent Developments/Updates

Table 15. LJUNGSTR?M Basic Information, Manufacturing Base and Competitors

Table 16. LJUNGSTR?M Major Business

Table 17. LJUNGSTR?M Industrial Air Preheater Product and Services

Table 18. LJUNGSTR?M Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. LJUNGSTR?M Recent Developments/Updates

Table 20. Chart Industries Basic Information, Manufacturing Base and Competitors

Table 21. Chart Industries Major Business

Table 22. Chart Industries Industrial Air Preheater Product and Services

Table 23. Chart Industries Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Chart Industries Recent Developments/Updates

Table 25. Clyde Bergemann Basic Information, Manufacturing Base and Competitors

Table 26. Clyde Bergemann Major Business

Table 27. Clyde Bergemann Industrial Air Preheater Product and Services

Table 28. Clyde Bergemann Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Clyde Bergemann Recent Developments/Updates

Table 30. Shandong Hengtao Group Basic Information, Manufacturing Base and Competitors

Table 31. Shandong Hengtao Group Major Business

Table 32. Shandong Hengtao Group Industrial Air Preheater Product and Services

Table 33. Shandong Hengtao Group Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Shandong Hengtao Group Recent Developments/Updates

Table 35. Harbin Boiler Company Basic Information, Manufacturing Base and Competitors

Table 36. Harbin Boiler Company Major Business

Table 37. Harbin Boiler Company Industrial Air Preheater Product and Services

Table 38. Harbin Boiler Company Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Harbin Boiler Company Recent Developments/Updates

Table 40. Dorigt Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 41. Dorigt Co., Ltd Major Business

Table 42. Dorigt Co., Ltd Industrial Air Preheater Product and Services

Table 43. Dorigt Co., Ltd Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Dorigt Co., Ltd Recent Developments/Updates

Table 45. Shanghai Dongrun Heat Exchange Equipment Co Basic Information, Manufacturing Base and Competitors

Table 46. Shanghai Dongrun Heat Exchange Equipment Co Major Business

Table 47. Shanghai Dongrun Heat Exchange Equipment Co Industrial Air Preheater Product and Services

Table 48. Shanghai Dongrun Heat Exchange Equipment Co Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

- Table 49. Shanghai Dongrun Heat Exchange Equipment Co Recent Developments/Updates
- Table 50. Wecergy Basic Information, Manufacturing Base and Competitors
- Table 51. Wecergy Major Business
- Table 52. Wecergy Industrial Air Preheater Product and Services
- Table 53. Wecergy Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 54. Wecergy Recent Developments/Updates
- Table 55. SHPHE Basic Information, Manufacturing Base and Competitors
- Table 56. SHPHE Major Business
- Table 57. SHPHE Industrial Air Preheater Product and Services
- Table 58. SHPHE Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 59. SHPHE Recent Developments/Updates
- Table 60. Shanghai Electric Basic Information, Manufacturing Base and Competitors
- Table 61. Shanghai Electric Major Business
- Table 62. Shanghai Electric Industrial Air Preheater Product and Services
- Table 63. Shanghai Electric Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 64. Shanghai Electric Recent Developments/Updates
- Table 65. Wuxi Weishengtai Thermal Energy Equipment Co Basic Information, Manufacturing Base and Competitors
- Table 66. Wuxi Weishengtai Thermal Energy Equipment Co Major Business
- Table 67. Wuxi Weishengtai Thermal Energy Equipment Co Industrial Air Preheater Product and Services
- Table 68. Wuxi Weishengtai Thermal Energy Equipment Co Industrial Air Preheater Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 69. Wuxi Weishengtai Thermal Energy Equipment Co Recent Developments/Updates
- Table 70. Global Industrial Air Preheater Sales Quantity by Manufacturer (2021-2026) & (K Units)
- Table 71. Global Industrial Air Preheater Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 72. Global Industrial Air Preheater Average Price by Manufacturer (2021-2026) & (K US\$/Unit)
- Table 73. Market Position of Manufacturers in Industrial Air Preheater, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

- Table 74. Head Office and Industrial Air Preheater Production Site of Key Manufacturer
- Table 75. Industrial Air Preheater Market: Company Product Type Footprint
- Table 76. Industrial Air Preheater Market: Company Product Application Footprint
- Table 77. Industrial Air Preheater New Market Entrants and Barriers to Market Entry
- Table 78. Industrial Air Preheater Mergers, Acquisition, Agreements, and Collaborations
- Table 79. Global Industrial Air Preheater Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 80. Global Industrial Air Preheater Sales Quantity by Region (2021-2026) & (K Units)
- Table 81. Global Industrial Air Preheater Sales Quantity by Region (2027-2032) & (K Units)
- Table 82. Global Industrial Air Preheater Consumption Value by Region (2021-2026) & (USD Million)
- Table 83. Global Industrial Air Preheater Consumption Value by Region (2027-2032) & (USD Million)
- Table 84. Global Industrial Air Preheater Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 85. Global Industrial Air Preheater Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 86. Global Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)
- Table 87. Global Industrial Air Preheater Sales Quantity by Type (2027-2032) & (K Units)
- Table 88. Global Industrial Air Preheater Consumption Value by Type (2021-2026) & (USD Million)
- Table 89. Global Industrial Air Preheater Consumption Value by Type (2027-2032) & (USD Million)
- Table 90. Global Industrial Air Preheater Average Price by Type (2021-2026) & (K US\$/Unit)
- Table 91. Global Industrial Air Preheater Average Price by Type (2027-2032) & (K US\$/Unit)
- Table 92. Global Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)
- Table 93. Global Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)
- Table 94. Global Industrial Air Preheater Consumption Value by Application (2021-2026) & (USD Million)
- Table 95. Global Industrial Air Preheater Consumption Value by Application (2027-2032) & (USD Million)

Table 96. Global Industrial Air Preheater Average Price by Application (2021-2026) & (K US\$/Unit)

Table 97. Global Industrial Air Preheater Average Price by Application (2027-2032) & (K US\$/Unit)

Table 98. North America Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)

Table 99. North America Industrial Air Preheater Sales Quantity by Type (2027-2032) & (K Units)

Table 100. North America Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)

Table 101. North America Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)

Table 102. North America Industrial Air Preheater Sales Quantity by Country (2021-2026) & (K Units)

Table 103. North America Industrial Air Preheater Sales Quantity by Country (2027-2032) & (K Units)

Table 104. North America Industrial Air Preheater Consumption Value by Country (2021-2026) & (USD Million)

Table 105. North America Industrial Air Preheater Consumption Value by Country (2027-2032) & (USD Million)

Table 106. Europe Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)

Table 107. Europe Industrial Air Preheater Sales Quantity by Type (2027-2032) & (K Units)

Table 108. Europe Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)

Table 109. Europe Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)

Table 110. Europe Industrial Air Preheater Sales Quantity by Country (2021-2026) & (K Units)

Table 111. Europe Industrial Air Preheater Sales Quantity by Country (2027-2032) & (K Units)

Table 112. Europe Industrial Air Preheater Consumption Value by Country (2021-2026) & (USD Million)

Table 113. Europe Industrial Air Preheater Consumption Value by Country (2027-2032) & (USD Million)

Table 114. Asia-Pacific Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)

Table 115. Asia-Pacific Industrial Air Preheater Sales Quantity by Type (2027-2032) &

(K Units)

Table 116. Asia-Pacific Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)

Table 117. Asia-Pacific Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)

Table 118. Asia-Pacific Industrial Air Preheater Sales Quantity by Region (2021-2026) & (K Units)

Table 119. Asia-Pacific Industrial Air Preheater Sales Quantity by Region (2027-2032) & (K Units)

Table 120. Asia-Pacific Industrial Air Preheater Consumption Value by Region (2021-2026) & (USD Million)

Table 121. Asia-Pacific Industrial Air Preheater Consumption Value by Region (2027-2032) & (USD Million)

Table 122. South America Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)

Table 123. South America Industrial Air Preheater Sales Quantity by Type (2027-2032) & (K Units)

Table 124. South America Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)

Table 125. South America Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)

Table 126. South America Industrial Air Preheater Sales Quantity by Country (2021-2026) & (K Units)

Table 127. South America Industrial Air Preheater Sales Quantity by Country (2027-2032) & (K Units)

Table 128. South America Industrial Air Preheater Consumption Value by Country (2021-2026) & (USD Million)

Table 129. South America Industrial Air Preheater Consumption Value by Country (2027-2032) & (USD Million)

Table 130. Middle East & Africa Industrial Air Preheater Sales Quantity by Type (2021-2026) & (K Units)

Table 131. Middle East & Africa Industrial Air Preheater Sales Quantity by Type (2027-2032) & (K Units)

Table 132. Middle East & Africa Industrial Air Preheater Sales Quantity by Application (2021-2026) & (K Units)

Table 133. Middle East & Africa Industrial Air Preheater Sales Quantity by Application (2027-2032) & (K Units)

Table 134. Middle East & Africa Industrial Air Preheater Sales Quantity by Country (2021-2026) & (K Units)

Table 135. Middle East & Africa Industrial Air Preheater Sales Quantity by Country (2027-2032) & (K Units)

Table 136. Middle East & Africa Industrial Air Preheater Consumption Value by Country (2021-2026) & (USD Million)

Table 137. Middle East & Africa Industrial Air Preheater Consumption Value by Country (2027-2032) & (USD Million)

Table 138. Industrial Air Preheater Raw Material

Table 139. Key Manufacturers of Industrial Air Preheater Raw Materials

Table 140. Industrial Air Preheater Typical Distributors

Table 141. Industrial Air Preheater Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Industrial Air Preheater Picture

Figure 2. Global Industrial Air Preheater Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Industrial Air Preheater Revenue Market Share by Type in 2025

Figure 4. Plate Examples

Figure 5. Tubular Examples

Figure 6. Rotary Examples

Figure 7. Global Industrial Air Preheater Revenue by Heat Transfer Method, (USD Million), 2021 & 2025 & 2032

Figure 8. Global Industrial Air Preheater Revenue Market Share by Heat Transfer Method in 2025

Figure 9. Indirect Heat Transfer Preheater Examples

Figure 10. Direct Contact Preheater Examples

Figure 11. Hybrid Heat Transfer Preheater Examples

Figure 12. Others Examples

Figure 13. Global Industrial Air Preheater Revenue by Material Type, (USD Million), 2021 & 2025 & 2032

Figure 14. Global Industrial Air Preheater Revenue Market Share by Material Type in 2025

Figure 15. Carbon Steel Examples

Figure 16. Enamel-Coated Examples

Figure 17. Corrosion-Resistant Alloy Examples

Figure 18. Ceramic Composite Examples

Figure 19. Global Industrial Air Preheater Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 20. Global Industrial Air Preheater Revenue Market Share by Application in 2025

Figure 21. Power & Energy Examples

Figure 22. Chemical & Petrochemical Examples

Figure 23. Metallurgical & Industrial Furnaces Examples

Figure 24. Waste Treatment Examples

Figure 25. Others Examples

Figure 26. Global Industrial Air Preheater Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 27. Global Industrial Air Preheater Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 28. Global Industrial Air Preheater Sales Quantity (2021-2032) & (K Units)

Figure 29. Global Industrial Air Preheater Price (2021-2032) & (K US\$/Unit)

Figure 30. Global Industrial Air Preheater Sales Quantity Market Share by Manufacturer in 2025

Figure 31. Global Industrial Air Preheater Revenue Market Share by Manufacturer in 2025

Figure 32. Producer Shipments of Industrial Air Preheater by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 33. Top 3 Industrial Air Preheater Manufacturer (Revenue) Market Share in 2025

Figure 34. Top 6 Industrial Air Preheater Manufacturer (Revenue) Market Share in 2025

Figure 35. Global Industrial Air Preheater Sales Quantity Market Share by Region (2021-2032)

Figure 36. Global Industrial Air Preheater Consumption Value Market Share by Region (2021-2032)

Figure 37. North America Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 38. Europe Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 39. Asia-Pacific Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 40. South America Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 41. Middle East & Africa Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 42. Global Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 43. Global Industrial Air Preheater Consumption Value Market Share by Type (2021-2032)

Figure 44. Global Industrial Air Preheater Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 45. Global Industrial Air Preheater Sales Quantity Market Share by Application (2021-2032)

Figure 46. Global Industrial Air Preheater Revenue Market Share by Application (2021-2032)

Figure 47. Global Industrial Air Preheater Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 48. North America Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 49. North America Industrial Air Preheater Sales Quantity Market Share by

Application (2021-2032)

Figure 50. North America Industrial Air Preheater Sales Quantity Market Share by Country (2021-2032)

Figure 51. North America Industrial Air Preheater Consumption Value Market Share by Country (2021-2032)

Figure 52. United States Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 53. Canada Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 54. Mexico Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 55. Europe Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 56. Europe Industrial Air Preheater Sales Quantity Market Share by Application (2021-2032)

Figure 57. Europe Industrial Air Preheater Sales Quantity Market Share by Country (2021-2032)

Figure 58. Europe Industrial Air Preheater Consumption Value Market Share by Country (2021-2032)

Figure 59. Germany Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 60. France Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 61. United Kingdom Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 62. Russia Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 63. Italy Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 64. Asia-Pacific Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 65. Asia-Pacific Industrial Air Preheater Sales Quantity Market Share by Application (2021-2032)

Figure 66. Asia-Pacific Industrial Air Preheater Sales Quantity Market Share by Region (2021-2032)

Figure 67. Asia-Pacific Industrial Air Preheater Consumption Value Market Share by Region (2021-2032)

Figure 68. China Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 69. Japan Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Million)

Figure 70. South Korea Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 71. India Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 72. Southeast Asia Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 73. Australia Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 74. South America Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 75. South America Industrial Air Preheater Sales Quantity Market Share by Application (2021-2032)

Figure 76. South America Industrial Air Preheater Sales Quantity Market Share by Country (2021-2032)

Figure 77. South America Industrial Air Preheater Consumption Value Market Share by Country (2021-2032)

Figure 78. Brazil Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 79. Argentina Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 80. Middle East & Africa Industrial Air Preheater Sales Quantity Market Share by Type (2021-2032)

Figure 81. Middle East & Africa Industrial Air Preheater Sales Quantity Market Share by Application (2021-2032)

Figure 82. Middle East & Africa Industrial Air Preheater Sales Quantity Market Share by Country (2021-2032)

Figure 83. Middle East & Africa Industrial Air Preheater Consumption Value Market Share by Country (2021-2032)

Figure 84. Turkey Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 85. Egypt Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 86. Saudi Arabia Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 87. South Africa Industrial Air Preheater Consumption Value (2021-2032) & (USD Million)

Figure 88. Industrial Air Preheater Market Drivers

Figure 89. Industrial Air Preheater Market Restraints

Figure 90. Industrial Air Preheater Market Trends

Figure 91. Porters Five Forces Analysis

Figure 92. Manufacturing Cost Structure Analysis of Industrial Air Preheater in 2025

Figure 93. Manufacturing Process Analysis of Industrial Air Preheater

Figure 94. Industrial Air Preheater Industrial Chain

Figure 95. Sales Channel: Direct to End-User vs Distributors

Figure 96. Direct Channel Pros & Cons

Figure 97. Indirect Channel Pros & Cons

Figure 98. Methodology

Figure 99. Research Process and Data Source

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