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Global Power Plants Air-Cooled Condenser Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Power Plants Air-Cooled Condenser market size is expected to reach $ 716 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

The power plants air-cooled condenser (ACC) is a dry cooling heat exchanger that directly condenses turbine exhaust steam using ambient air, with core components including finned tube bundles, axial fans, steam distribution piping and supporting frames. It is primarily classified by configuration into A-frame, V-frame and horizontal types. Key upstream raw materials consist of carbon steel tubes, aluminum fins, galvanized steel sheets and fan motors, with carbon steel and aluminum together accounting for approximately 50%-65% of total product cost. Major downstream clients include electric utility operators and engineering, procurement and construction contractors. In 2025, the global production capacity for power plants ACC is estimated at approximately 550 units, with global sales volume reaching around 439 units. On an ex-factory price basis, the global average selling price stands at approximately US$1.20 million per unit, and gross margins for this business segment among mainstream industry players generally range from 20% to 35%.

The current global market for power plants air-cooled condensers has entered a mature stage, characterized by high industrial concentration. Leading players have built significant technical barriers through long-term engineering track records, finned tube manufacturing know-how, and system integration capabilities. From a regional perspective, China and India remain the main battlefields for new air-cooled projects because both countries face growing power demand coupled with water resource constraints. In Europe and North America, the market is dominated by retrofit, upgrade, and maintenance services for aging units. Coal-fired power plants still represent the

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largest application segment, but combined-cycle plants, waste-to-energy, and concentrated solar power in water-scarce regions are gradually expanding their share, indicating a shift from a single reliance on large coal power toward diversified cooling scenarios.

Looking ahead, technological evolution will focus on large-scale and modular designs, reducing metal consumption and fan energy consumption per unit of cooling capacity by increasing single-module heat transfer area and optimizing tube bundle arrangements. At the same time, intelligent control is becoming a key differentiator. Dynamic vacuum regulation systems based on real-time weather data and unit load forecasting help to maintain stable backpressure while minimizing energy use. In addition, improvements in anti-corrosion coatings and cleaning devices will enhance long-term reliability in harsh environments such as sandy or coastal areas, thereby extending the application boundary of ACC.

The core driving force for market growth stems from increasing global freshwater scarcity. In most arid and semi-arid regions, wet cooling for new power plants faces severe pressure from water withdrawal permits and environmental compliance, making air cooling virtually the only viable water-saving alternative. On the other hand, industrialization and urbanization in developing economies continuously lift electricity demand, and air-cooled equipment has seen steady penetration in newly planned coal and gas power stations. Retrofit demand in the existing stock is also considerable, as numerous early-generation air-cooled systems suffer from tube bundle corrosion or fan aging, leading to significantly lower efficiency and prompting major overhauls or full replacement programs.

Major barriers include high initial capital expenditure and environmental sensitivity. Compared with wet cooling towers, ACC requires substantially more metal and complex manufacturing processes, resulting in equipment procurement costs that are thirty to fifty percent higher for the same installed capacity. This cost pressure is increasingly challenging for investors, especially amid electricity market deregulation and the grid parity of renewables. Furthermore, extreme weather such as high wind, heat, and freezing can severely impair heat transfer efficiency of the air-cooled island, causing increased turbine backpressure or even load reduction. Therefore, additional spray cooling or extra heat exchange surface may be needed in high-ambient-temperature regions. Finally, the rapid rise of wind and solar power generation has continuously reduced annual operating hours of thermal power units, making some potential owners worry about the payback period of large air-cooling investments and thus slowing down project initiation.

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This report studies the global Power Plants Air-Cooled Condenser production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Power Plants Air-Cooled Condenser 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 Power Plants Air-Cooled Condenser that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Power Plants Air-Cooled Condenser total production and demand, 2021-2032, (Units)
Global Power Plants Air-Cooled Condenser total production value, 2021-2032, (USD Million)
Global Power Plants Air-Cooled Condenser production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Power Plants Air-Cooled Condenser consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Power Plants Air-Cooled Condenser domestic production, consumption, key domestic manufacturers and share
Global Power Plants Air-Cooled Condenser production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Power Plants Air-Cooled Condenser production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Power Plants Air-Cooled Condenser production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Power Plants Air-Cooled Condenser 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 Paharpur, ENEXIO, EVAPCO, John Cockerill Group, Holtec, Kelvion, Thermax, Dasan DTS, Harbin Air Conditioning, Shouhang High-Tech Energy, 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

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used in analyzing the World Power Plants Air-Cooled Condenser 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 Power Plants Air-Cooled Condenser Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Power Plants Air-Cooled Condenser Market, Segmentation by Type:

Horizontal Condenser

V and A Frame Condenser

Global Power Plants Air-Cooled Condenser Market, Segmentation by Cooling Cycle:

Direct Dry Cooling System

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Indirect Dry Cooling System

Global Power Plants Air-Cooled Condenser Market, Segmentation by Airflow Pattern:

Induced Draft Type

Forced Draft Type

Global Power Plants Air-Cooled Condenser Market, Segmentation by Application:

Thermal Power Plant

Nuclear Power Plant

Other

Companies Profiled:

Paharpur

ENEXIO

EVAPCO

John Cockerill Group

Holtec

Kelvion

Thermax

Dasan DTS

Harbin Air Conditioning

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Shouhang High-Tech Energy

Shuangliang Energy

Tianrui

Key Questions Answered:
1. How big is the global Power Plants Air-Cooled Condenser market?
2. What is the demand of the global Power Plants Air-Cooled Condenser market?
3. What is the year over year growth of the global Power Plants Air-Cooled Condenser market?
4. What is the production and production value of the global Power Plants Air-Cooled Condenser market?
5. Who are the key producers in the global Power Plants Air-Cooled Condenser market?
6. What are the growth factors driving the market demand?

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