

# Global Rotary Regenerative Heaters Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Rotary Regenerative Heaters market size is expected to reach \$ 2228 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

In 2025, global Rotary Regenerative Heater output reached about 26,000 units and global capacity of around 30,000 units. The average price is about USD 60,000 per unit, with gross margins near 27%. Rotary Regenerative Heater is a heat exchange device widely used in power plants, refineries, and industrial boilers to recover waste heat from flue gas and transfer it to incoming air (or gas streams) through a rotating heat storage element (typically a matrix of metal plates). As the rotor slowly turns between hot and cold gas streams, it alternately absorbs heat from exhaust gases and releases it to the incoming air, significantly improving thermal efficiency and reducing fuel consumption. The supply chain of rotary regenerative heaters begins with upstream raw materials such as carbon steel, stainless steel, and corrosion-resistant alloys used for rotor structures and heat transfer elements, along with insulation materials and drive components. Midstream, specialized manufacturers design and fabricate complete systems, including rotor assemblies, sector plates, seals, gear drives, and control systems, often tailored to specific boiler sizes and operating conditions. Engineering firms and EPC contractors integrate these heaters into larger thermal systems in power plants or industrial facilities. Downstream, end users include coal-fired and biomass power plants, cement kilns, petrochemical refineries, and waste-to-energy plants, where RRHs are installed, maintained, and periodically upgraded with replacement baskets and sealing systems to sustain performance and meet emissions regulations.

This report studies the global Rotary Regenerative Heaters production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rotary Regenerative Heaters 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 Rotary Regenerative Heaters that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Rotary Regenerative Heaters total production and demand, 2021-2032, (Units)

Global Rotary Regenerative Heaters total production value, 2021-2032, (USD Million)

Global Rotary Regenerative Heaters production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Rotary Regenerative Heaters consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rotary Regenerative Heaters domestic production, consumption, key domestic manufacturers and share

Global Rotary Regenerative Heaters production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Rotary Regenerative Heaters production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Rotary Regenerative Heaters production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Rotary Regenerative Heaters 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 ARVOS Group (Germany), Balcke-D?rr (Germany), Siemens Energy (Germany), Hamon Group (Belgium), Howden Group (UK), Babcock & Wilcox (USA), Doosan Enerbility (South Korea), Mitsubishi Heavy Industries (Japan), Shuangliang Boiler (China), Wuxi Huaguang Boiler (China), 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 Rotary Regenerative Heaters 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 Rotary Regenerative Heaters Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Rotary Regenerative Heaters Market, Segmentation by Type:

Vertical Rotor Type

Horizontal Rotor Type

#### Global Rotary Regenerative Heaters Market, Segmentation by Thermal Capacity:

300 MWth

#### Global Rotary Regenerative Heaters Market, Segmentation by Application:

Power Generation

Cement Industry

Petrochemical

Metallurgical

Pulp & Paper

Others

#### Companies Profiled:

ARVOS Group (Germany)

Balcke-D?rr (Germany)

Siemens Energy (Germany)

Hamon Group (Belgium)

Howden Group (UK)

Babcock & Wilcox (USA)

Doosan Enerbility (South Korea)

Mitsubishi Heavy Industries (Japan)

Shuangliang Boiler (China)

Wuxi Huaguang Boiler (China)

Hangzhou Boiler Group (China)

Shanghai Boiler Works (China)

## Jinan Boiler Group (China)

### Key Questions Answered:

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

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