

Global Cement Waste Heat Utilization Equipment Market Growth 2026-2032

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Abstracts

The global Cement Waste Heat Utilization Equipment market size is predicted to grow from US\$ 3142 million in 2025 to US\$ 7239 million in 2032; it is expected to grow at a CAGR of 12.8% from 2026 to 2032.

Cement Waste Heat Utilization Equipment refers to key equipment dedicated to waste heat recovery and power generation systems in new dry process cement clinker production lines. Its core distinguishing features from waste heat boilers used in steel, chemical, glass and other industries include: (1) the heat source is medium-low temperature exhaust gas (250-400°C) from the kiln head (AQC) and kiln tail (SP/PH) with high dust concentration and large temperature fluctuations, requiring high wear resistance, anti-ash accumulation and thermal shock resistance; (2) boilers adopt vertical natural circulation structure (mainstream in China), with kiln head boilers typically featuring two heat exchange sections (steam section + hot water section) adapted to clinker cooler exhaust characteristics; (3) steam turbines are low-pressure, condensing or dual-pressure supplementary steam type, adapted to low-pressure, fluctuating steam parameters from waste heat boilers. Core equipment includes: kiln head AQC waste heat boiler, kiln tail SP/PH waste heat boiler, supplementary condensing steam turbine generator set, and DCS control system. Compared to ordinary industrial waste heat boilers, cement waste heat boilers must specifically address high-dust erosion on heating surfaces, low-temperature acid dew point corrosion, and operational shocks from cement line condition fluctuations, making structural complexity and manufacturing precision much higher than conventional waste heat recovery equipment.

Cement waste heat utilization equipment is one of the most technically demanding yet mature sub-segments in industrial waste heat recovery. The challenge: cement kiln

exhaust contains extremely high dust loads (50?100 g/Nm³ at kiln head), large temperature fluctuations (?50?), and boilers must operate continuously for 3?5 years without cleaning. This forces AQC and SP boilers to adopt vertical natural circulation, built-in dust collectors, and finned tube wear-resistant heating surfaces ? far more complex than waste heat boilers used in steel or chemical industries. Pricing: Equipment investment for a 5,000 t/d line (AQC boiler + SP boiler + turbine generator + DCS) is RMB 20?30 million (USD 2.8?4.2 million), with each boiler accounting for 25?30% of equipment cost and turbine generator 20?25%. Margins: Chinese leaders (Sinoma, Conch Kawasaki, Kaishan) achieve 20?25% gross margins through in-house equipment manufacturing and EPC; component suppliers (Crun, Jin Tong Ling) 15?20%; overseas ORC suppliers (Ormat, Turboden) command 35?45% due to technology monopoly. Downstream primary applications: new cement line builds account for 50?60% of equipment demand; brownfield retrofits 30?35%; low-temperature ORC retrofits 20% yoy). Incremental demand comes from: (1) new cement line builds in Southeast Asia, Middle East, Africa driving equipment exports; (2) single-pressure to dual-pressure upgrades in China (10?15% efficiency gain), creating a replacement market of RMB 3?5 billion/year; (3) ORC penetration in low-temperature sections, improving recovery rate by 8?12%. Upstream-downstream structure: upstream ? high-temperature alloys and tube suppliers; downstream ? cement producers (China National Building Material, Conch) and EPC contractors. Key bottlenecks: AQC boiler heating surface wear (overhaul every 3?5 years), SP boiler ash cleaning difficulty, and high ORC equipment cost (1.5?2x conventional Rankine cycle). Landscape: ?Chinese integration leaders + international ORC technology giants?. Sinoma leads global market share; Conch Kawasaki produces 80 waste heat boilers/year, deploying 302 units; Kaishan holds unique high-efficiency reheat technology; Ormat and Turboden lead in ORC low-temperature segment; FLSmidth holds exclusive Kalina Cycle? license. Uncertainties: cement overcapacity slowing new line investment; ORC cost reduction potentially replacing steam Rankine cycle; geopolitical risks for overseas EPC projects; cement industry profitability constraining retrofit capital expenditure. Conclusion: Cement waste heat utilization equipment represents the highest technical barrier and most demanding operating conditions in industrial waste heat recovery, with core value in achieving stable, efficient recovery under extreme high-dust, continuous operation. Structural features are saturated domestic market with large retrofit potential, overseas growth tied to infrastructure cycles, and stable replacement demand from short equipment life cycles. Leaders with in-house core equipment manufacturing and overseas EPC experience will continue expanding global market share over the next 3?5 years.

LP Information, Inc. (LPI) ' newest research report, the ?Cement Waste Heat Utilization

Equipment Industry Forecast? looks at past sales and reviews total world Cement Waste Heat Utilization Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Cement Waste Heat Utilization Equipment sales for 2026 through 2032. With Cement Waste Heat Utilization Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Cement Waste Heat Utilization Equipment industry.

This Insight Report provides a comprehensive analysis of the global Cement Waste Heat Utilization Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Cement Waste Heat Utilization Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Cement Waste Heat Utilization Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Cement Waste Heat Utilization Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Cement Waste Heat Utilization Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Cement Waste Heat Utilization Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

AQC Waste Heat Boiler (Kiln Head)

SP/PH Waste Heat Boiler (Kiln Tail)

Low-Parameter Steam Turbine

Generator & Auxiliaries

ORC Unit (for Low-Temperature Section)

Segmentation by Efficiency:

- Low Efficiency (<32 kWh/t clinker)
- Standard Efficiency (32-38 kWh/t clinker)
- High Efficiency (38-42 kWh/t clinker)
- Ultra-high Efficiency (>42 kWh/t clinker)

Segmentation by Application:

- Greenfield Cement Plant New Build
- Brownfield Retrofit & Upgrade
- Low-Temperature ORC Retrofitting
- Cement Plant Captive Power Generation
- Export to Local Grid
- Others

This report also splits the market by region:

- Americas
 - United States
 - Canada
 - Mexico
 - Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Sinoma Energy Conservation

Anhui Conch Kawasaki Engineering

Nanjing Kaishan Keneng

CITIC Heavy Industries

Ormat Technologies

Kawasaki Plant Systems

Turboden

FLSmidth

Sichuan Crun

Jin Tong Ling Technology Group

Thermax

ABB

Hangzhou Zhongneng Turbine Power

Shandong Juli Wangneng

Anhui Jierun Power

Hanwha Energy

Transparent Energy Systems

Zhengzhou Boiler

Tai'an Boiler Group

Jiangsu Yancheng Boiler

Key Questions Addressed in this Report

What is the 10-year outlook for the global Cement Waste Heat Utilization Equipment market?

What factors are driving Cement Waste Heat Utilization Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Cement Waste Heat Utilization Equipment market opportunities vary by end market size?

How does Cement Waste Heat Utilization Equipment break out by Type, by Application?

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