

Global Cement Waste Heat Utilization Market Growth 2026-2032

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Abstracts

The global Cement Waste Heat Utilization market size is predicted to grow from US\$ 21130 million in 2025 to US\$ 37672 million in 2032; it is expected to grow at a CAGR of 8.7% from 2026 to 2032.

Cement waste heat utilization refers to the capture and conversion of medium-to-low temperature exhaust waste heat (300-400°C from preheater exhaust, 200-350°C from clinker cooler) generated during new dry process cement clinker production into electricity, heat, or other secondary energy through dedicated waste heat recovery systems. The core product is the waste heat power generation system, consisting of waste heat boilers (kiln inlet SP boiler, kiln outlet AQC boiler), steam turbines, generators, auxiliary equipment, and control systems. Cement waste heat utilization includes captive power generation (grid-connected or self-consumption), cross-industrial cogeneration for heating, agricultural greenhouse heating, and other pathways. The technology consumes no additional fuel and generates no extra carbon emissions, reducing comprehensive energy consumption per ton of clinker by 8-12 kgce and lowering plant self-power consumption by 25-35%, offering both economic and environmental benefits. Utilization models have expanded from single-site power generation toward source-grid-load-storage integration, waste-heat-coupled carbon capture, agricultural heating, and other diversified applications.

Cement waste heat utilization is one of the most mature yet still underestimated segments in industrial energy efficiency. The technology converts 300-400°C preheater exhaust and 200-350°C clinker cooler hot air into electricity or heat, achieving 38-42 kWh per ton of clinker, reducing comprehensive energy consumption by 8-12 kgce/t, with no additional fuel or carbon emissions. Pricing: EPC investment for a 5,000 t/d line is RMB 50-80 million, with generation cost around RMB 0.15-0.20/kWh ? about

one-third to one-half of industrial grid tariffs. Payback period is typically 3-5 years. Margins vary by business model: EPC gross margin 15-20%; core equipment (boilers, turbines) 25-30%; BOT (Build-Operate-Transfer) model can exceed 40%, offering utility-like stable cash flow. Downstream: captive power generation (self-consumption) accounts for ~70% of installed capacity; grid sales 10-15%; cross-sector heating (district heating, agricultural greenhouses) 5-10%; carbon capture integration and green microgrids below 5% but fastest-growing. Incremental demand comes from: (1) retrofit of older single-pressure systems to dual-pressure/reheat, increasing output 15-20%, creating a replacement equipment market of RMB 3-5 billion/year in China; (2) new cement lines in Southeast Asia, Middle East, Africa driving EPC exports; (3) cross-sector synergy - Conch's waste-heat-heated greenhouses produce 3x tomato yield; (4) carbon capture integration - waste heat provides regeneration energy for amine-based capture, reducing energy penalty by ~30%. Upstream-downstream structure: upstream - boiler, turbine, ORC unit manufacturers (Sichuan Crun, CITIC Heavy, Ormat, Turboden); midstream - system integrators and EPC contractors (Sinoma Energy, Conch Kawasaki, Nanjing Kaishan, Kawasaki, FLSmidth); downstream - cement producers (China National Building Material, Conch) and cross-sector heat users. The landscape is a duopoly of Chinese integration leaders + international ORC technology giants. Sinoma Energy has the largest global market share (~30% in China), with strong Belt & Road presence; Ormat and Turboden lead in low-temperature ORC technology. ESG perspective: Cement accounts for ~13% of China's CO₂ emissions. Waste heat power saves ~10,000 tCO₂/year per line (0.85 tCO₂/MWh). After CCER restart, carbon credits can generate additional annual revenue of RMB 0.5-1.0 million per line. Replacing coal-fired heating with waste heat reduces PM_{2.5} and SO₂, supporting green factory certification, green loans, and improved ESG ratings. Uncertainties include: (1) cement capacity utilization volatility affecting waste heat generation; (2) carbon market price and CCER methodology updates; (3) ORC cost reduction potentially accelerating substitution of steam Rankine cycle; (4) geopolitical risks for overseas EPC projects. Conclusion: Cement waste heat utilization has evolved from a 'nice-to-have' energy-saving retrofit into a must-have infrastructure for cost reduction, carbon compliance, ESG improvement, and cross-sector synergy. Core drivers are carbon peaking policies, rising industrial electricity tariffs, and circular economy incentives. Structural features are high penetration with large retrofit potential, Chinese leaders dominating domestic while overseas growth awaits, and technology mature but ORC gaining share. Over the next five years, integrators with BOT capabilities, cross-sector heating experience, and carbon asset development skills will capture the greatest value.

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

Industry Forecast? looks at past sales and reviews total world Cement Waste Heat Utilization sales in 2025, providing a comprehensive analysis by region and market sector of projected Cement Waste Heat Utilization sales for 2026 through 2032. With Cement Waste Heat Utilization 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 industry.

This Insight Report provides a comprehensive analysis of the global Cement Waste Heat Utilization 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 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 market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Cement Waste Heat Utilization 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.

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

Segmentation by Type:

Single?Pressure Steam Rankine Cycle

Dual?Pressure / Reheat Steam Rankine Cycle

Organic Rankine Cycle (ORC)

Kalina Cycle

Integrated CHP / Cross?Sector Heating

Segmentation by Temperature:

300?400? Kiln Tail (Preheater) Exhaust Gas

200?350? Kiln Head (Clinker Cooler) Hot Air

Below 200? Low Temperature Exhaust

Segmentation by Application:

Captive Power Generation (On?site)

Grid?Connected Power Sales

Cross?Sector District Heating

Agricultural Greenhouse Heating

Carbon Capture Integration

Industrial Green Microgrid

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

Sichuan Crun

Jin Tong Ling Technology Group

Ormat Technologies

Kawasaki Plant Systems

Turboden

FLSmidth

Siemens Energy

ABB

GE Gas Power

Thermax

Transparent Energy Systems

China National Building Material Group

Anhui Conch Cement

Key Questions Addressed in this Report

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

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

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

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

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

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