

Global Dry Flue Gas Purification Equipment Market Growth 2026-2032

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Abstracts

The global Dry Flue Gas Purification Equipment market size is predicted to grow from US\$ 6691 million in 2025 to US\$ 9432 million in 2032; it is expected to grow at a CAGR of 5.0% from 2026 to 2032.

Dry flue gas cleaning equipment refers to industrial systems and devices that remove pollutants from flue gases generated by industrial combustion processes using dry processes. The core characteristic lies in the absence or minimal addition of water throughout the entire purification process, with flue gas temperature maintained relatively stable before and after treatment, thereby avoiding the wastewater treatment issues associated with wet processes. The research scope covers the complete process equipment chain from sorbent injection and absorption reaction to particulate separation. Major product configurations include circulating fluidized bed dry absorbers, spray dryer absorbers, dry sorbent injection systems, activated carbon injection systems, and supporting baghouse filters. The mainstream technological routes comprise circulating fluidized bed dry scrubbing, spray dryer absorption, and dry sorbent injection. Key technical specifications include inlet flue gas temperature, inlet sulfur dioxide concentration, desulfurization efficiency, outlet particulate concentration, and system pressure drop. The critical functions of this equipment are the efficient removal of acid gases including sulfur dioxide, hydrogen chloride, and hydrogen fluoride, with simultaneous co removal of heavy metals, dioxins, and particulate matter. Under optimized configurations, desulfurization efficiency can exceed 95% with outlet particulate concentration controlled below 10 milligrams per standard cubic meter. Primary applications cover flue gas treatment for coal fired power generation, iron and steel sintering, cement kilns, waste to energy facilities, glass furnaces, and industrial boilers. The average gross margin in the global dry flue gas cleaning equipment industry for 2025 is estimated between 22% and 28%. Typical system pricing varies by

application scenario: small scale industrial boiler and kiln applications range from 0.3 to 2 million US dollars per unit; medium scale waste to energy and iron and steel sintering applications range from 3 to 15 million US dollars per unit; large scale coal fired power plant ultra low emission applications range from 20 to 60 million US dollars per unit. Actual prices are significantly influenced by flue gas treatment capacity, inlet pollutant concentrations, applicable emission standards, and system complexity.

The upstream segment of the global dry flue gas cleaning equipment industry primarily consists of suppliers of steel materials, filter media, sorbents, fans, pumps, and valves, while the midstream segment comprises core equipment manufacturers and system integrators. The downstream segment serves end users including coal fired power plants, iron and steel sintering facilities, cement kilns, waste to energy incineration plants, and industrial boilers. Raw material price fluctuations in the upstream segment significantly impact equipment manufacturing costs, particularly the supply chain stability of specialty steel grades and high grade filter media, which directly determines equipment service life and operational efficiency. The midstream segment exhibits a multi layered competitive structure, with leading manufacturers holding core patents, complete product portfolios, and large scale project track records dominating the global market share. A long tail of small and medium sized specialized manufacturers focusing on regional markets or specific industrial scenarios constitutes the remaining supply base. End user purchasing decisions are shifting from initial capital expenditure toward total lifecycle operation and maintenance costs and emission compliance reliability, driving midstream manufacturers to transform from equipment suppliers to integrated solution providers.

The global competitive landscape shows a three tier structure where European, American, and Japanese companies dominate the high end market, Chinese manufacturers lead in production capacity scale, and regional players fill local demand. From a technology distribution perspective, circulating fluidized bed dry scrubbing maintains a clear advantage in large coal fired power units, spray dryer absorption holds significant share in the waste to energy market, and dry sorbent injection offers flexible configuration with lower investment thresholds suitable for small to medium scale installations and retrofit projects. Recent merger and acquisition activity has been notable, with several traditional European environmental brands refocusing their core dry technology businesses through asset restructuring, while Chinese leading manufacturers pursue horizontal acquisitions to consolidate regional market resources and expand overseas channels. New product launches concentrate on three directions including compact design, low energy consumption operation, and intelligent control, with multiple manufacturers introducing modular dry cleaning units targeting small and

medium scale industrial kilns. This represents an attempt to extend market coverage from large centralized heat sources toward decentralized application scenarios.

From a policy perspective, major economies continue tightening emission limits for pollutants in industrial flue gas including sulfur dioxide, nitrogen oxides, particulate matter, dioxins, and heavy metals, pushing dry cleaning equipment to upgrade toward multi pollutant synergistic removal. Following the completion of ultra low emission retrofits for coal fired power plants, China is shifting policy focus toward deep treatment of non power sectors including steel, cement, and glass, opening new incremental space for dry cleaning equipment. Revisions to the European Union Industrial Emissions Directive and tightening environmental standards in India and Southeast Asian countries likewise serve as important demand catalysts. From a development outlook perspective, the global dry cleaning equipment market will maintain steady positive growth, supported by industrialization processes in emerging economies and ongoing retrofit upgrades in the Chinese installed base. Large scale deployment of intelligent operation and maintenance systems, sorbent injection optimization control, and remote diagnostic platforms is driving equipment efficiency improvements. The cost advantage of Chinese equipment manufacturers in the global mid tier market continues expanding, accelerating integration into regional supply chains through local assembly and technical cooperation. Traditional European manufacturers concentrate further on core patent equipment exports and high value added technical services. Overall, leading manufacturers possessing high technical barriers, complete product portfolios, and global service capabilities will continue benefiting from ongoing industry consolidation.

LP Information, Inc. (LPI) ' newest research report, the "Dry Flue Gas Purification Equipment Industry Forecast" looks at past sales and reviews total world Dry Flue Gas Purification Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Dry Flue Gas Purification Equipment sales for 2026 through 2032. With Dry Flue Gas Purification Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Dry Flue Gas Purification Equipment industry.

This Insight Report provides a comprehensive analysis of the global Dry Flue Gas Purification 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 Dry Flue Gas Purification Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these

firms? unique position in an accelerating global Dry Flue Gas Purification Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dry Flue Gas Purification 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 Dry Flue Gas Purification Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Dry Flue Gas Purification Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dry Desulfurization System

Dry Deacidification System

Particulate Removal System

Heavy Metal Removal System

Others

Segmentation by Primary Function:

Circulating Fluidized Bed Dry Scrubbing

Spray Dryer Absorber

Dry Sorbent Injection

Circulating Dry Scrubber with Integrated Baghouse

Others

Segmentation by Application:

Waste to Energy WtE

Cement Kiln

Steel Sintering Plant

Industrial Boiler

Biomass Power Plant

Non Ferrous Smelting

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.

Mitsubishi Power

Bawey

Doosan Lentjes

ANDRITZ

FLSmidth

Hamon

Valmet

Hitachi Zosen Inova

Takuma

JFE Engineering

Thermax

Dukang

Lodge Cottrell

RAFAKO S.A.

LAB SA

DrySoTec GmbH

BoldEco Environment

Verantis

Fujian Longking Environmental Protection Co., Ltd.

Zhejiang Feida Environmental Technology Co., Ltd.

SPIC Yuanda Environmental Protection Co., Ltd. (State Power Investment Corp.)

Guoneng Longyuan Environmental Protection Co., Ltd.

Beijing AVIC Taida Environmental Technology Co., Ltd.

Beijing Qingxin Environment Technology Co., Ltd.

Jiangsu New Century Jiangnan Environmental Protection Co., Ltd.

DP CleanTech

Macrotek Inc.

Kawasaki Heavy Industries

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dry Flue Gas Purification Equipment market?

What factors are driving Dry Flue Gas Purification Equipment market growth, globally and by region?

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

How do Dry Flue Gas Purification Equipment market opportunities vary by end market size?

How does Dry Flue Gas Purification Equipment break out by Type, by Application?

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