

Global Flue Gas Desulfurizer (FGD) Market Growth 2026-2032

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Abstracts

The global Flue Gas Desulfurizer (FGD) market size is predicted to grow from US\$ 4181 million in 2025 to US\$ 5430 million in 2032; it is expected to grow at a CAGR of 3.9% from 2026 to 2032.

Flue Gas Desulfurizer is an air pollution control system used to remove sulfur dioxide and other sulfur oxides from combustion or process flue gas, and it is critical because it allows power plants, waste incinerators, steel mills, smelters, cement kilns, refineries and industrial boiler operators to comply with sulfur emission limits while maintaining plant availability. Flue Gas Desulfurizer equipment system includes absorbers, scrubber towers, slurry or reagent handling equipment, oxidation systems, mist eliminators, recirculation systems, drying or injection equipment, and the associated control package when supplied as part of the FGD system.

Upstream supply of FGD is engineering-intensive. The procurement model is usually project-based, with power utilities and industrial owners using public tenders, annual qualified supplier lists, EPC packages or retrofit contracts. Large coal power projects usually procure FGD as part of an air quality control system package, while industrial users often buy smaller wet, semi-dry or dry systems under plant-specific emission upgrade programs.

In the current market, global supply is around 55,500 MW-equivalent, with an average selling price of about 77,000 USD per MW-equivalent EXW basis. Demand is still centered on coal power, but incremental opportunities are shifting toward steel sintering, nonferrous smelting, waste-to-energy, cement, refining and petrochemical flue gas treatment. China remains the largest single demand region because of coal power additions and continuing industrial ultra-low-emission upgrades, while India remains

important but more volatile after the relaxation of mandatory FGD requirements for many coal-fired units. Europe and North America are smaller by MW-equivalent volume, but ASP is structurally higher because retrofit work, industrial systems, site constraints, high labor cost and stricter performance guarantees increase the equipment content per treated MW-equivalent. The typical industry gross margin is estimated at 26.5% for equipment-system suppliers on an EXW basis. The margin is supported by process know-how, absorber design, corrosion control, guarantee testing, reference projects, site-specific engineering and the ability to integrate FGD with upstream boilers or downstream particulate control equipment. Low-cost regional suppliers can compete aggressively in standard wet limestone systems, but higher-margin projects remain concentrated in retrofit, semi-dry, seawater, ammonia and industrial packages.

Top 5 suppliers control approximately 28.0% of global revenue CR5, indicating a moderately fragmented market. Mitsubishi Power and Babcock & Wilcox retain strong positions in high-capacity wet FGD and established utility references, while Chinese suppliers such as Fujian Longking, Zhejiang Feida Environmental, Guoneng Longyuan Environmental and Beijing SPC Environment Protection Tech are structurally important in China's power and industrial markets. ANDRITZ, Valmet, Kawasaki Heavy Industries, Sumitomo Heavy Industries, KC Cottrell, Babcock Power Environmental, Ducon Technologies, BHEL and Isgec address specific regional or technology niches. During 2026-2032, the market is expected to grow moderately rather than rapidly. The main drivers are industrial emission tightening, replacement of aging wet scrubbers, higher removal efficiency requirements, waste-to-energy expansion and local compliance pressure in Asia, the Middle East and selected emerging markets. The main restraints are coal plant retirement in developed markets, uncertainty in Indian enforcement, high retrofit cost, water use concerns and long project approval cycles. AI-enabled monitoring will gradually support predictive maintenance, reagent optimization and performance tuning, but it will not change the physical equipment nature of the market. The key bottleneck is not basic fabrication capacity; it is proven reference performance under difficult coal, fuel oil, sinter, smelter and waste-gas conditions.

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

This Insight Report provides a comprehensive analysis of the global Flue Gas Desulfurizer (FGD) 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 Flue Gas Desulfurizer (FGD) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Flue Gas Desulfurizer (FGD) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Flue Gas Desulfurizer (FGD) and breaks down the forecast by Process, 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 Flue Gas Desulfurizer (FGD).

This report presents a comprehensive overview, market shares, and growth opportunities of Flue Gas Desulfurizer (FGD) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Process:

Wet FGD

Semi-Dry FGD

Dry FGD

Other FGD

Segmentation by Absorbent:

Limestone FGD

Lime FGD

Ammonia FGD

Magnesium FGD

Sodium FGD

Other Absorbent FGD

Segmentation by Installation:

Newbuild FGD

Upgrade FGD

Segmentation by Byproduct Form:

Gypsum-Producing FGD

Dry Residue FGD

Discharge-Based FGD

Regenerated Product FGD

Other Byproduct FGD

Segmentation by Application:

Coal Power

Waste-to-Energy

Steel

Nonferrous Smelting

Cement Kilns

Refining Petrochemicals

Industrial Boilers

Other Industries

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

Babcock & Wilcox

GE Vernova

ANDRITZ

Valmet

Kawasaki Heavy Industries

Sumitomo Heavy Industries

KC Cottrell

Babcock Power Environmental

Ducon Technologies

Steuler Anlagenbau

Bharat Heavy Electricals

Isgec Heavy Engineering

Fujian Longking

Zhejiang Feida Environmental

Guoneng Longyuan Environmental

Beijing SPC Environment Protection Tech

Jiangsu Jiangnan Ecological Carbon Technology

Yatai Environmental

Tongxing Environmental

Sinosteel Tiancheng Environmental

Yongqing Environmental

Jiangsu Fengye Environment

Zhejiang Tuna Environmental

Key Questions Addressed in this Report

What is the 10-year outlook for the global Flue Gas Desulfurizer (FGD) market?

What factors are driving Flue Gas Desulfurizer (FGD) market growth, globally and by region?

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

How do Flue Gas Desulfurizer (FGD) market opportunities vary by end market size?

How does Flue Gas Desulfurizer (FGD) break out by Process, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Flue Gas Desulfurizer (FGD) Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Flue Gas Desulfurizer (FGD) by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Flue Gas Desulfurizer (FGD) by Country/Region, 2021, 2025 & 2032

2.2 Flue Gas Desulfurizer (FGD) Segment by Process

- 2.2.1 Wet FGD
- 2.2.2 Semi-Dry FGD
- 2.2.3 Dry FGD
- 2.2.4 Other FGD
- 2.2.5 Flue Gas Desulfurizer (FGD) Sales by Process
 - 2.2.5.1 Global Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)
 - 2.2.5.2 Global Flue Gas Desulfurizer (FGD) Revenue and Market Share by Process (2021-2026)
 - 2.2.5.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Process (2021-2026)

2.3 Flue Gas Desulfurizer (FGD) Segment by Absorbent

- 2.3.1 Limestone FGD
- 2.3.2 Lime FGD
- 2.3.3 Ammonia FGD
- 2.3.4 Magnesium FGD
- 2.3.5 Sodium FGD
- 2.3.6 Other Absorbent FGD

2.3.7 Flue Gas Desulfurizer (FGD) Sales by Absorbent

2.3.7.1 Global Flue Gas Desulfurizer (FGD) Sales Market Share by Absorbent (2021-2026)

2.3.7.2 Global Flue Gas Desulfurizer (FGD) Revenue and Market Share by Absorbent (2021-2026)

2.3.7.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Absorbent (2021-2026)

2.4 Flue Gas Desulfurizer (FGD) Segment by Installation

2.4.1 Newbuild FGD

2.4.2 Upgrade FGD

2.4.3 Flue Gas Desulfurizer (FGD) Sales by Installation

2.4.3.1 Global Flue Gas Desulfurizer (FGD) Sales Market Share by Installation (2021-2026)

2.4.3.2 Global Flue Gas Desulfurizer (FGD) Revenue and Market Share by Installation (2021-2026)

2.4.3.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Installation (2021-2026)

2.5 Flue Gas Desulfurizer (FGD) Segment by Byproduct Form

2.5.1 Gypsum-Producing FGD

2.5.2 Dry Residue FGD

2.5.3 Discharge-Based FGD

2.5.4 Regenerated Product FGD

2.5.5 Other Byproduct FGD

2.5.6 Flue Gas Desulfurizer (FGD) Sales by Byproduct Form

2.5.6.1 Global Flue Gas Desulfurizer (FGD) Sales Market Share by Byproduct Form (2021-2026)

2.5.6.2 Global Flue Gas Desulfurizer (FGD) Revenue and Market Share by Byproduct Form (2021-2026)

2.5.6.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Byproduct Form (2021-2026)

2.6 Flue Gas Desulfurizer (FGD) Segment by Application

2.6.1 Coal Power

2.6.2 Waste-to-Energy

2.6.3 Steel

2.6.4 Nonferrous Smelting

2.6.5 Cement Kilns

2.6.6 Refining Petrochemicals

2.6.7 Industrial Boilers

2.6.8 Other Industries

2.6.9 Flue Gas Desulfurizer (FGD) Sales by Application

2.6.9.1 Global Flue Gas Desulfurizer (FGD) Sale Market Share by Application

(2021-2026)

2.6.9.2 Global Flue Gas Desulfurizer (FGD) Revenue and Market Share by Application (2021-2026)

2.6.9.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Flue Gas Desulfurizer (FGD) Breakdown Data by Company

3.1.1 Global Flue Gas Desulfurizer (FGD) Annual Sales by Company (2021-2026)

3.1.2 Global Flue Gas Desulfurizer (FGD) Sales Market Share by Company (2021-2026)

3.2 Global Flue Gas Desulfurizer (FGD) Annual Revenue by Company (2021-2026)

3.2.1 Global Flue Gas Desulfurizer (FGD) Revenue by Company (2021-2026)

3.2.2 Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Company (2021-2026)

3.3 Global Flue Gas Desulfurizer (FGD) Sale Price by Company

3.4 Key Manufacturers Flue Gas Desulfurizer (FGD) Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Flue Gas Desulfurizer (FGD) Product Location Distribution

3.4.2 Players Flue Gas Desulfurizer (FGD) Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR FLUE GAS DESULFURIZER (FGD) BY GEOGRAPHIC REGION

4.1 World Historic Flue Gas Desulfurizer (FGD) Market Size by Geographic Region (2021-2026)

4.1.1 Global Flue Gas Desulfurizer (FGD) Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Flue Gas Desulfurizer (FGD) Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Flue Gas Desulfurizer (FGD) Market Size by Country/Region (2021-2026)

4.2.1 Global Flue Gas Desulfurizer (FGD) Annual Sales by Country/Region (2021-2026)

4.2.2 Global Flue Gas Desulfurizer (FGD) Annual Revenue by Country/Region (2021-2026)

4.3 Americas Flue Gas Desulfurizer (FGD) Sales Growth

4.4 APAC Flue Gas Desulfurizer (FGD) Sales Growth

4.5 Europe Flue Gas Desulfurizer (FGD) Sales Growth

4.6 Middle East & Africa Flue Gas Desulfurizer (FGD) Sales Growth

5 AMERICAS

5.1 Americas Flue Gas Desulfurizer (FGD) Sales by Country

5.1.1 Americas Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026)

5.1.2 Americas Flue Gas Desulfurizer (FGD) Revenue by Country (2021-2026)

5.2 Americas Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026)

5.3 Americas Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Flue Gas Desulfurizer (FGD) Sales by Region

6.1.1 APAC Flue Gas Desulfurizer (FGD) Sales by Region (2021-2026)

6.1.2 APAC Flue Gas Desulfurizer (FGD) Revenue by Region (2021-2026)

6.2 APAC Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026)

6.3 APAC Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Flue Gas Desulfurizer (FGD) by Country

7.1.1 Europe Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026)

7.1.2 Europe Flue Gas Desulfurizer (FGD) Revenue by Country (2021-2026)

- 7.2 Europe Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026)
- 7.3 Europe Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Flue Gas Desulfurizer (FGD) by Country
 - 8.1.1 Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Flue Gas Desulfurizer (FGD) Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026)
- 8.3 Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Flue Gas Desulfurizer (FGD)
- 10.3 Manufacturing Process Analysis of Flue Gas Desulfurizer (FGD)
- 10.4 Industry Chain Structure of Flue Gas Desulfurizer (FGD)

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels

- 11.1.2 Indirect Channels
- 11.2 Flue Gas Desulfurizer (FGD) Distributors
- 11.3 Flue Gas Desulfurizer (FGD) Customer

12 WORLD FORECAST REVIEW FOR FLUE GAS DESULFURIZER (FGD) BY GEOGRAPHIC REGION

- 12.1 Global Flue Gas Desulfurizer (FGD) Market Size Forecast by Region
 - 12.1.1 Global Flue Gas Desulfurizer (FGD) Forecast by Region (2027-2032)
 - 12.1.2 Global Flue Gas Desulfurizer (FGD) Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Flue Gas Desulfurizer (FGD) Forecast by Process (2027-2032)
- 12.7 Global Flue Gas Desulfurizer (FGD) Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Mitsubishi Power
 - 13.1.1 Mitsubishi Power Company Information
 - 13.1.2 Mitsubishi Power Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.1.3 Mitsubishi Power Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Mitsubishi Power Main Business Overview
 - 13.1.5 Mitsubishi Power Latest Developments
- 13.2 Babcock & Wilcox
 - 13.2.1 Babcock & Wilcox Company Information
 - 13.2.2 Babcock & Wilcox Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.2.3 Babcock & Wilcox Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Babcock & Wilcox Main Business Overview
 - 13.2.5 Babcock & Wilcox Latest Developments
- 13.3 GE Vernova
 - 13.3.1 GE Vernova Company Information
 - 13.3.2 GE Vernova Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.3.3 GE Vernova Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 GE Vernova Main Business Overview

13.3.5 GE Vernova Latest Developments

13.4 ANDRITZ

13.4.1 ANDRITZ Company Information

13.4.2 ANDRITZ Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.4.3 ANDRITZ Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 ANDRITZ Main Business Overview

13.4.5 ANDRITZ Latest Developments

13.5 Valmet

13.5.1 Valmet Company Information

13.5.2 Valmet Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.5.3 Valmet Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Valmet Main Business Overview

13.5.5 Valmet Latest Developments

13.6 Kawasaki Heavy Industries

13.6.1 Kawasaki Heavy Industries Company Information

13.6.2 Kawasaki Heavy Industries Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.6.3 Kawasaki Heavy Industries Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Kawasaki Heavy Industries Main Business Overview

13.6.5 Kawasaki Heavy Industries Latest Developments

13.7 Sumitomo Heavy Industries

13.7.1 Sumitomo Heavy Industries Company Information

13.7.2 Sumitomo Heavy Industries Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.7.3 Sumitomo Heavy Industries Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Sumitomo Heavy Industries Main Business Overview

13.7.5 Sumitomo Heavy Industries Latest Developments

13.8 KC Cottrell

13.8.1 KC Cottrell Company Information

13.8.2 KC Cottrell Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.8.3 KC Cottrell Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.8.4 KC Cottrell Main Business Overview
- 13.8.5 KC Cottrell Latest Developments
- 13.9 Babcock Power Environmental
 - 13.9.1 Babcock Power Environmental Company Information
 - 13.9.2 Babcock Power Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.9.3 Babcock Power Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Babcock Power Environmental Main Business Overview
 - 13.9.5 Babcock Power Environmental Latest Developments
- 13.10 Ducon Technologies
 - 13.10.1 Ducon Technologies Company Information
 - 13.10.2 Ducon Technologies Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.10.3 Ducon Technologies Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Ducon Technologies Main Business Overview
 - 13.10.5 Ducon Technologies Latest Developments
- 13.11 Steuler Anlagenbau
 - 13.11.1 Steuler Anlagenbau Company Information
 - 13.11.2 Steuler Anlagenbau Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.11.3 Steuler Anlagenbau Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Steuler Anlagenbau Main Business Overview
 - 13.11.5 Steuler Anlagenbau Latest Developments
- 13.12 Bharat Heavy Electricals
 - 13.12.1 Bharat Heavy Electricals Company Information
 - 13.12.2 Bharat Heavy Electricals Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.12.3 Bharat Heavy Electricals Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Bharat Heavy Electricals Main Business Overview
 - 13.12.5 Bharat Heavy Electricals Latest Developments
- 13.13 Isgec Heavy Engineering
 - 13.13.1 Isgec Heavy Engineering Company Information
 - 13.13.2 Isgec Heavy Engineering Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
 - 13.13.3 Isgec Heavy Engineering Flue Gas Desulfurizer (FGD) Sales, Revenue, Price

and Gross Margin (2021-2026)

13.13.4 Isgec Heavy Engineering Main Business Overview

13.13.5 Isgec Heavy Engineering Latest Developments

13.14 Fujian Longking

13.14.1 Fujian Longking Company Information

13.14.2 Fujian Longking Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.14.3 Fujian Longking Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Fujian Longking Main Business Overview

13.14.5 Fujian Longking Latest Developments

13.15 Zhejiang Feida Environmental

13.15.1 Zhejiang Feida Environmental Company Information

13.15.2 Zhejiang Feida Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.15.3 Zhejiang Feida Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Zhejiang Feida Environmental Main Business Overview

13.15.5 Zhejiang Feida Environmental Latest Developments

13.16 Guoneng Longyuan Environmental

13.16.1 Guoneng Longyuan Environmental Company Information

13.16.2 Guoneng Longyuan Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.16.3 Guoneng Longyuan Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Guoneng Longyuan Environmental Main Business Overview

13.16.5 Guoneng Longyuan Environmental Latest Developments

13.17 Beijing SPC Environment Protection Tech

13.17.1 Beijing SPC Environment Protection Tech Company Information

13.17.2 Beijing SPC Environment Protection Tech Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.17.3 Beijing SPC Environment Protection Tech Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Beijing SPC Environment Protection Tech Main Business Overview

13.17.5 Beijing SPC Environment Protection Tech Latest Developments

13.18 Jiangsu Jiangnan Ecological Carbon Technology

13.18.1 Jiangsu Jiangnan Ecological Carbon Technology Company Information

13.18.2 Jiangsu Jiangnan Ecological Carbon Technology Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.18.3 Jiangsu Jiangnan Ecological Carbon Technology Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Jiangsu Jiangnan Ecological Carbon Technology Main Business Overview

13.18.5 Jiangsu Jiangnan Ecological Carbon Technology Latest Developments

13.19 Yatai Environmental

13.19.1 Yatai Environmental Company Information

13.19.2 Yatai Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.19.3 Yatai Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Yatai Environmental Main Business Overview

13.19.5 Yatai Environmental Latest Developments

13.20 Tongxing Environmental

13.20.1 Tongxing Environmental Company Information

13.20.2 Tongxing Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.20.3 Tongxing Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Tongxing Environmental Main Business Overview

13.20.5 Tongxing Environmental Latest Developments

13.21 Sinosteel Tiancheng Environmental

13.21.1 Sinosteel Tiancheng Environmental Company Information

13.21.2 Sinosteel Tiancheng Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.21.3 Sinosteel Tiancheng Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Sinosteel Tiancheng Environmental Main Business Overview

13.21.5 Sinosteel Tiancheng Environmental Latest Developments

13.22 Yongqing Environmental

13.22.1 Yongqing Environmental Company Information

13.22.2 Yongqing Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.22.3 Yongqing Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Yongqing Environmental Main Business Overview

13.22.5 Yongqing Environmental Latest Developments

13.23 Jiangsu Fengye Environment

13.23.1 Jiangsu Fengye Environment Company Information

13.23.2 Jiangsu Fengye Environment Flue Gas Desulfurizer (FGD) Product Portfolios

and Specifications

13.23.3 Jiangsu Fengye Environment Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 Jiangsu Fengye Environment Main Business Overview

13.23.5 Jiangsu Fengye Environment Latest Developments

13.24 Zhejiang Tuna Environmental

13.24.1 Zhejiang Tuna Environmental Company Information

13.24.2 Zhejiang Tuna Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

13.24.3 Zhejiang Tuna Environmental Flue Gas Desulfurizer (FGD) Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Zhejiang Tuna Environmental Main Business Overview

13.24.5 Zhejiang Tuna Environmental Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Flue Gas Desulfurizer (FGD) Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Flue Gas Desulfurizer (FGD) Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Wet FGD

Table 4. Major Players of Semi-Dry FGD

Table 5. Major Players of Dry FGD

Table 6. Major Players of Other FGD

Table 7. Global Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026) & (MW-equivalent)

Table 8. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)

Table 9. Global Flue Gas Desulfurizer (FGD) Revenue by Process (2021-2026) & (\$ million)

Table 10. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Process (2021-2026)

Table 11. Global Flue Gas Desulfurizer (FGD) Sale Price by Process (2021-2026) & (USD/MW-equivalent)

Table 12. Major Players of Limestone FGD

Table 13. Major Players of Lime FGD

Table 14. Major Players of Ammonia FGD

Table 15. Major Players of Magnesium FGD

Table 16. Major Players of Sodium FGD

Table 17. Major Players of Other Absorbent FGD

Table 18. Global Flue Gas Desulfurizer (FGD) Sales by Absorbent (2021-2026) & (MW-equivalent)

Table 19. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Absorbent (2021-2026)

Table 20. Global Flue Gas Desulfurizer (FGD) Revenue by Absorbent (2021-2026) & (\$ million)

Table 21. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Absorbent (2021-2026)

Table 22. Global Flue Gas Desulfurizer (FGD) Sale Price by Absorbent (2021-2026) & (USD/MW-equivalent)

Table 23. Major Players of Newbuild FGD

Table 24. Major Players of Upgrade FGD

Table 25. Global Flue Gas Desulfurizer (FGD) Sales by Installation (2021-2026) & (MW-equivalent)

Table 26. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Installation (2021-2026)

Table 27. Global Flue Gas Desulfurizer (FGD) Revenue by Installation (2021-2026) & (\$ million)

Table 28. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Installation (2021-2026)

Table 29. Global Flue Gas Desulfurizer (FGD) Sale Price by Installation (2021-2026) & (USD/MW-equivalent)

Table 30. Major Players of Gypsum-Producing FGD

Table 31. Major Players of Dry Residue FGD

Table 32. Major Players of Discharge-Based FGD

Table 33. Major Players of Regenerated Product FGD

Table 34. Major Players of Other Byproduct FGD

Table 35. Global Flue Gas Desulfurizer (FGD) Sales by Byproduct Form (2021-2026) & (MW-equivalent)

Table 36. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Byproduct Form (2021-2026)

Table 37. Global Flue Gas Desulfurizer (FGD) Revenue by Byproduct Form (2021-2026) & (\$ million)

Table 38. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Byproduct Form (2021-2026)

Table 39. Global Flue Gas Desulfurizer (FGD) Sale Price by Byproduct Form (2021-2026) & (USD/MW-equivalent)

Table 40. Global Flue Gas Desulfurizer (FGD) Sale by Application (2021-2026) & (MW-equivalent)

Table 41. Global Flue Gas Desulfurizer (FGD) Sale Market Share by Application (2021-2026)

Table 42. Global Flue Gas Desulfurizer (FGD) Revenue by Application (2021-2026) & (\$ million)

Table 43. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Application (2021-2026)

Table 44. Global Flue Gas Desulfurizer (FGD) Sale Price by Application (2021-2026) & (USD/MW-equivalent)

Table 45. Global Flue Gas Desulfurizer (FGD) Sales by Company (2021-2026) & (MW-equivalent)

Table 46. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Company

(2021-2026)

Table 47. Global Flue Gas Desulfurizer (FGD) Revenue by Company (2021-2026) & (\$ millions)

Table 48. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Company (2021-2026)

Table 49. Global Flue Gas Desulfurizer (FGD) Sale Price by Company (2021-2026) & (USD/MW-equivalent)

Table 50. Key Manufacturers Flue Gas Desulfurizer (FGD) Producing Area Distribution and Sales Area

Table 51. Players Flue Gas Desulfurizer (FGD) Products Offered

Table 52. Flue Gas Desulfurizer (FGD) Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 53. New Products and Potential Entrants

Table 54. Market M&A Activity & Strategy

Table 55. Global Flue Gas Desulfurizer (FGD) Sales by Geographic Region (2021-2026) & (MW-equivalent)

Table 56. Global Flue Gas Desulfurizer (FGD) Sales Market Share Geographic Region (2021-2026)

Table 57. Global Flue Gas Desulfurizer (FGD) Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 58. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Geographic Region (2021-2026)

Table 59. Global Flue Gas Desulfurizer (FGD) Sales by Country/Region (2021-2026) & (MW-equivalent)

Table 60. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Country/Region (2021-2026)

Table 61. Global Flue Gas Desulfurizer (FGD) Revenue by Country/Region (2021-2026) & (\$ millions)

Table 62. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Country/Region (2021-2026)

Table 63. Americas Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026) & (MW-equivalent)

Table 64. Americas Flue Gas Desulfurizer (FGD) Sales Market Share by Country (2021-2026)

Table 65. Americas Flue Gas Desulfurizer (FGD) Revenue by Country (2021-2026) & (\$ millions)

Table 66. Americas Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026) & (MW-equivalent)

Table 67. Americas Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026) &

(MW-equivalent)

Table 68. APAC Flue Gas Desulfurizer (FGD) Sales by Region (2021-2026) & (MW-equivalent)

Table 69. APAC Flue Gas Desulfurizer (FGD) Sales Market Share by Region (2021-2026)

Table 70. APAC Flue Gas Desulfurizer (FGD) Revenue by Region (2021-2026) & (\$ millions)

Table 71. APAC Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026) & (MW-equivalent)

Table 72. APAC Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026) & (MW-equivalent)

Table 73. Europe Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026) & (MW-equivalent)

Table 74. Europe Flue Gas Desulfurizer (FGD) Revenue by Country (2021-2026) & (\$ millions)

Table 75. Europe Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026) & (MW-equivalent)

Table 76. Europe Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026) & (MW-equivalent)

Table 77. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Country (2021-2026) & (MW-equivalent)

Table 78. Middle East & Africa Flue Gas Desulfurizer (FGD) Revenue Market Share by Country (2021-2026)

Table 79. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Process (2021-2026) & (MW-equivalent)

Table 80. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales by Application (2021-2026) & (MW-equivalent)

Table 81. Key Market Drivers & Growth Opportunities of Flue Gas Desulfurizer (FGD)

Table 82. Key Market Challenges & Risks of Flue Gas Desulfurizer (FGD)

Table 83. Key Industry Trends of Flue Gas Desulfurizer (FGD)

Table 84. Flue Gas Desulfurizer (FGD) Raw Material

Table 85. Key Suppliers of Raw Materials

Table 86. Flue Gas Desulfurizer (FGD) Distributors List

Table 87. Flue Gas Desulfurizer (FGD) Customer List

Table 88. Global Flue Gas Desulfurizer (FGD) Sales Forecast by Region (2027-2032) & (MW-equivalent)

Table 89. Global Flue Gas Desulfurizer (FGD) Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 90. Americas Flue Gas Desulfurizer (FGD) Sales Forecast by Country

(2027-2032) & (MW-equivalent)

Table 91. Americas Flue Gas Desulfurizer (FGD) Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 92. APAC Flue Gas Desulfurizer (FGD) Sales Forecast by Region (2027-2032) & (MW-equivalent)

Table 93. APAC Flue Gas Desulfurizer (FGD) Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 94. Europe Flue Gas Desulfurizer (FGD) Sales Forecast by Country (2027-2032) & (MW-equivalent)

Table 95. Europe Flue Gas Desulfurizer (FGD) Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 96. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales Forecast by Country (2027-2032) & (MW-equivalent)

Table 97. Middle East & Africa Flue Gas Desulfurizer (FGD) Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 98. Global Flue Gas Desulfurizer (FGD) Sales Forecast by Process (2027-2032) & (MW-equivalent)

Table 99. Global Flue Gas Desulfurizer (FGD) Revenue Forecast by Process (2027-2032) & (\$ millions)

Table 100. Global Flue Gas Desulfurizer (FGD) Sales Forecast by Application (2027-2032) & (MW-equivalent)

Table 101. Global Flue Gas Desulfurizer (FGD) Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 102. Mitsubishi Power Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 103. Mitsubishi Power Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 104. Mitsubishi Power Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 105. Mitsubishi Power Main Business

Table 106. Mitsubishi Power Latest Developments

Table 107. Babcock & Wilcox Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 108. Babcock & Wilcox Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 109. Babcock & Wilcox Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 110. Babcock & Wilcox Main Business

Table 111. Babcock & Wilcox Latest Developments

Table 112. GE Vernova Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 113. GE Vernova Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 114. GE Vernova Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 115. GE Vernova Main Business

Table 116. GE Vernova Latest Developments

Table 117. ANDRITZ Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 118. ANDRITZ Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 119. ANDRITZ Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 120. ANDRITZ Main Business

Table 121. ANDRITZ Latest Developments

Table 122. Valmet Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 123. Valmet Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 124. Valmet Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 125. Valmet Main Business

Table 126. Valmet Latest Developments

Table 127. Kawasaki Heavy Industries Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 128. Kawasaki Heavy Industries Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 129. Kawasaki Heavy Industries Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 130. Kawasaki Heavy Industries Main Business

Table 131. Kawasaki Heavy Industries Latest Developments

Table 132. Sumitomo Heavy Industries Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 133. Sumitomo Heavy Industries Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 134. Sumitomo Heavy Industries Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 135. Sumitomo Heavy Industries Main Business

Table 136. Sumitomo Heavy Industries Latest Developments
Table 137. KC Cottrell Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors
Table 138. KC Cottrell Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
Table 139. KC Cottrell Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)
Table 140. KC Cottrell Main Business
Table 141. KC Cottrell Latest Developments
Table 142. Babcock Power Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors
Table 143. Babcock Power Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
Table 144. Babcock Power Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)
Table 145. Babcock Power Environmental Main Business
Table 146. Babcock Power Environmental Latest Developments
Table 147. Ducon Technologies Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors
Table 148. Ducon Technologies Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
Table 149. Ducon Technologies Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)
Table 150. Ducon Technologies Main Business
Table 151. Ducon Technologies Latest Developments
Table 152. Steuler Anlagenbau Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors
Table 153. Steuler Anlagenbau Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
Table 154. Steuler Anlagenbau Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)
Table 155. Steuler Anlagenbau Main Business
Table 156. Steuler Anlagenbau Latest Developments
Table 157. Bharat Heavy Electricals Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors
Table 158. Bharat Heavy Electricals Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications
Table 159. Bharat Heavy Electricals Flue Gas Desulfurizer (FGD) Sales (MW-

equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 160. Bharat Heavy Electricals Main Business

Table 161. Bharat Heavy Electricals Latest Developments

Table 162. Isgec Heavy Engineering Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 163. Isgec Heavy Engineering Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 164. Isgec Heavy Engineering Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 165. Isgec Heavy Engineering Main Business

Table 166. Isgec Heavy Engineering Latest Developments

Table 167. Fujian Longking Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 168. Fujian Longking Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 169. Fujian Longking Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 170. Fujian Longking Main Business

Table 171. Fujian Longking Latest Developments

Table 172. Zhejiang Feida Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 173. Zhejiang Feida Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 174. Zhejiang Feida Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 175. Zhejiang Feida Environmental Main Business

Table 176. Zhejiang Feida Environmental Latest Developments

Table 177. Guoneng Longyuan Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 178. Guoneng Longyuan Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 179. Guoneng Longyuan Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 180. Guoneng Longyuan Environmental Main Business

Table 181. Guoneng Longyuan Environmental Latest Developments

Table 182. Beijing SPC Environment Protection Tech Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 183. Beijing SPC Environment Protection Tech Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 184. Beijing SPC Environment Protection Tech Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 185. Beijing SPC Environment Protection Tech Main Business

Table 186. Beijing SPC Environment Protection Tech Latest Developments

Table 187. Jiangsu Jiangnan Ecological Carbon Technology Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 188. Jiangsu Jiangnan Ecological Carbon Technology Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 189. Jiangsu Jiangnan Ecological Carbon Technology Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 190. Jiangsu Jiangnan Ecological Carbon Technology Main Business

Table 191. Jiangsu Jiangnan Ecological Carbon Technology Latest Developments

Table 192. Yatai Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 193. Yatai Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 194. Yatai Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 195. Yatai Environmental Main Business

Table 196. Yatai Environmental Latest Developments

Table 197. Tongxing Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 198. Tongxing Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 199. Tongxing Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 200. Tongxing Environmental Main Business

Table 201. Tongxing Environmental Latest Developments

Table 202. Sinosteel Tiancheng Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 203. Sinosteel Tiancheng Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 204. Sinosteel Tiancheng Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 205. Sinosteel Tiancheng Environmental Main Business

Table 206. Sinosteel Tiancheng Environmental Latest Developments

Table 207. Yongqing Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 208. Yongqing Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 209. Yongqing Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 210. Yongqing Environmental Main Business

Table 211. Yongqing Environmental Latest Developments

Table 212. Jiangsu Fengye Environment Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 213. Jiangsu Fengye Environment Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 214. Jiangsu Fengye Environment Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 215. Jiangsu Fengye Environment Main Business

Table 216. Jiangsu Fengye Environment Latest Developments

Table 217. Zhejiang Tuna Environmental Basic Information, Flue Gas Desulfurizer (FGD) Manufacturing Base, Sales Area and Its Competitors

Table 218. Zhejiang Tuna Environmental Flue Gas Desulfurizer (FGD) Product Portfolios and Specifications

Table 219. Zhejiang Tuna Environmental Flue Gas Desulfurizer (FGD) Sales (MW-equivalent), Revenue (\$ Million), Price (USD/MW-equivalent) and Gross Margin (2021-2026)

Table 220. Zhejiang Tuna Environmental Main Business

Table 221. Zhejiang Tuna Environmental Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Flue Gas Desulfurizer (FGD)
- Figure 2. Flue Gas Desulfurizer (FGD) Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Flue Gas Desulfurizer (FGD) Sales Growth Rate 2021-2032 (MW-equivalent)
- Figure 7. Global Flue Gas Desulfurizer (FGD) Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Flue Gas Desulfurizer (FGD) Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Flue Gas Desulfurizer (FGD) Sales Market Share by Country/Region (2025)
- Figure 10. Flue Gas Desulfurizer (FGD) Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Wet FGD
- Figure 12. Product Picture of Semi-Dry FGD
- Figure 13. Product Picture of Dry FGD
- Figure 14. Product Picture of Other FGD
- Figure 15. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Process in 2026
- Figure 16. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Process (2021-2026)
- Figure 17. Product Picture of Limestone FGD
- Figure 18. Product Picture of Lime FGD
- Figure 19. Product Picture of Ammonia FGD
- Figure 20. Product Picture of Magnesium FGD
- Figure 21. Product Picture of Sodium FGD
- Figure 22. Product Picture of Other Absorbent FGD
- Figure 23. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Absorbent in 2026
- Figure 24. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Absorbent (2021-2026)
- Figure 25. Product Picture of Newbuild FGD
- Figure 26. Product Picture of Upgrade FGD
- Figure 27. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Installation in 2026

Figure 28. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Installation (2021-2026)

Figure 29. Product Picture of Gypsum-Producing FGD

Figure 30. Product Picture of Dry Residue FGD

Figure 31. Product Picture of Discharge-Based FGD

Figure 32. Product Picture of Regenerated Product FGD

Figure 33. Product Picture of Other Byproduct FGD

Figure 34. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Byproduct Form in 2026

Figure 35. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Byproduct Form (2021-2026)

Figure 36. Flue Gas Desulfurizer (FGD) Consumed in Coal Power

Figure 37. Global Flue Gas Desulfurizer (FGD) Market: Coal Power (2021-2026) & (MW-equivalent)

Figure 38. Flue Gas Desulfurizer (FGD) Consumed in Waste-to-Energy

Figure 39. Global Flue Gas Desulfurizer (FGD) Market: Waste-to-Energy (2021-2026) & (MW-equivalent)

Figure 40. Flue Gas Desulfurizer (FGD) Consumed in Steel

Figure 41. Global Flue Gas Desulfurizer (FGD) Market: Steel (2021-2026) & (MW-equivalent)

Figure 42. Flue Gas Desulfurizer (FGD) Consumed in Nonferrous Smelting

Figure 43. Global Flue Gas Desulfurizer (FGD) Market: Nonferrous Smelting (2021-2026) & (MW-equivalent)

Figure 44. Flue Gas Desulfurizer (FGD) Consumed in Cement Kilns

Figure 45. Global Flue Gas Desulfurizer (FGD) Market: Cement Kilns (2021-2026) & (MW-equivalent)

Figure 46. Flue Gas Desulfurizer (FGD) Consumed in Refining Petrochemicals

Figure 47. Global Flue Gas Desulfurizer (FGD) Market: Refining Petrochemicals (2021-2026) & (MW-equivalent)

Figure 48. Flue Gas Desulfurizer (FGD) Consumed in Industrial Boilers

Figure 49. Global Flue Gas Desulfurizer (FGD) Market: Industrial Boilers (2021-2026) & (MW-equivalent)

Figure 50. Flue Gas Desulfurizer (FGD) Consumed in Other Industries

Figure 51. Global Flue Gas Desulfurizer (FGD) Market: Other Industries (2021-2026) & (MW-equivalent)

Figure 52. Global Flue Gas Desulfurizer (FGD) Sale Market Share by Application (2025)

Figure 53. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Application in 2025

Figure 54. Flue Gas Desulfurizer (FGD) Sales by Company in 2025 (MW-equivalent)

Figure 55. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Company in 2025

Figure 56. Flue Gas Desulfurizer (FGD) Revenue by Company in 2025 (\$ millions)

Figure 57. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Company in 2025

Figure 58. Global Flue Gas Desulfurizer (FGD) Sales Market Share by Geographic Region (2021-2026)

Figure 59. Global Flue Gas Desulfurizer (FGD) Revenue Market Share by Geographic Region in 2025

Figure 60. Americas Flue Gas Desulfurizer (FGD) Sales 2021-2026 (MW-equivalent)

Figure 61. Americas Flue Gas Desulfurizer (FGD) Revenue 2021-2026 (\$ millions)

Figure 62. APAC Flue Gas Desulfurizer (FGD) Sales 2021-2026 (MW-equivalent)

Figure 63. APAC Flue Gas Desulfurizer (FGD) Revenue 2021-2026 (\$ millions)

Figure 64. Europe Flue Gas Desulfurizer (FGD) Sales 2021-2026 (MW-equivalent)

Figure 65. Europe Flue Gas Desulfurizer (FGD) Revenue 2021-2026 (\$ millions)

Figure 66. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales 2021-2026 (MW-equivalent)

Figure 67. Middle East & Africa Flue Gas Desulfurizer (FGD) Revenue 2021-2026 (\$ millions)

Figure 68. Americas Flue Gas Desulfurizer (FGD) Sales Market Share by Country in 2025

Figure 69. Americas Flue Gas Desulfurizer (FGD) Revenue Market Share by Country (2021-2026)

Figure 70. Americas Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)

Figure 71. Americas Flue Gas Desulfurizer (FGD) Sales Market Share by Application (2021-2026)

Figure 72. United States Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 73. Canada Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 74. Mexico Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 75. Brazil Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 76. APAC Flue Gas Desulfurizer (FGD) Sales Market Share by Region in 2025

Figure 77. APAC Flue Gas Desulfurizer (FGD) Revenue Market Share by Region (2021-2026)

Figure 78. APAC Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)

Figure 79. APAC Flue Gas Desulfurizer (FGD) Sales Market Share by Application

(2021-2026)

Figure 80. China Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 81. Japan Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Korea Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 83. Southeast Asia Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 84. India Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 85. Australia Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 86. China Taiwan Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 87. Europe Flue Gas Desulfurizer (FGD) Sales Market Share by Country in 2025

Figure 88. Europe Flue Gas Desulfurizer (FGD) Revenue Market Share by Country (2021-2026)

Figure 89. Europe Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)

Figure 90. Europe Flue Gas Desulfurizer (FGD) Sales Market Share by Application (2021-2026)

Figure 91. Germany Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 92. France Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 93. UK Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 94. Italy Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 95. Russia Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 96. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales Market Share by Country (2021-2026)

Figure 97. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales Market Share by Process (2021-2026)

Figure 98. Middle East & Africa Flue Gas Desulfurizer (FGD) Sales Market Share by Application (2021-2026)

Figure 99. Egypt Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 100. South Africa Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 101. Israel Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 102. Turkey Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 103. GCC Countries Flue Gas Desulfurizer (FGD) Revenue Growth 2021-2026 (\$ millions)

Figure 104. Manufacturing Cost Structure Analysis of Flue Gas Desulfurizer (FGD) in 2026

Figure 105. Manufacturing Process Analysis of Flue Gas Desulfurizer (FGD)

Figure 106. Industry Chain Structure of Flue Gas Desulfurizer (FGD)

Figure 107. Channels of Distribution

Figure 108. Global Flue Gas Desulfurizer (FGD) Sales Market Forecast by Region (2027-2032)

Figure 109. Global Flue Gas Desulfurizer (FGD) Revenue Market Share Forecast by Region (2027-2032)

Figure 110. Global Flue Gas Desulfurizer (FGD) Sales Market Share Forecast by Process (2027-2032)

Figure 111. Global Flue Gas Desulfurizer (FGD) Revenue Market Share Forecast by Process (2027-2032)

Figure 112. Global Flue Gas Desulfurizer (FGD) Sales Market Share Forecast by Application (2027-2032)

Figure 113. Global Flue Gas Desulfurizer (FGD) Revenue Market Share Forecast by Application (2027-2032)

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