

Global Rotary Regenerative Heaters Market Growth 2026-2032

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Abstracts

The global Rotary Regenerative Heaters market size is predicted to grow from US\$ 1526 million in 2025 to US\$ 2155 million in 2032; it is expected to grow at a CAGR of 5.1% from 2026 to 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.

United States market for Rotary Regenerative Heaters is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Rotary Regenerative Heaters is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Rotary Regenerative Heaters is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Rotary Regenerative Heaters players cover ARVOS Group (Germany), Balcke-Dürr (Germany), Siemens Energy (Germany), Hamon Group (Belgium), Howden Group (UK), etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Rotary Regenerative Heaters 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 Rotary Regenerative Heaters portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Rotary Regenerative Heaters market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Rotary Regenerative Heaters 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 Rotary Regenerative Heaters.

This report presents a comprehensive overview, market shares, and growth opportunities of Rotary Regenerative Heaters market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Vertical Rotor Type

Horizontal Rotor Type

Segmentation by Thermal Capacity:

300 MWth

Segmentation by Application:

Power Generation

Cement Industry

Petrochemical

Metallurgical

Pulp & Paper

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.

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 Addressed in this Report

What is the 10-year outlook for the global Rotary Regenerative Heaters market?

What factors are driving Rotary Regenerative Heaters market growth, globally and by region?

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

How do Rotary Regenerative Heaters market opportunities vary by end market size?

How does Rotary Regenerative Heaters break out by Type, by Application?

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