

Heat Recovery Steam Generator Market by Rated Power (Up To 30 MW & >30 MW), by Application (Combined Cycle & CHP), by End-User (Utilities, Chemicals, Refineries, Pulp & Paper, Commercial & Others), and by Region - Global Trends & Forecast to 2020

<https://marketpublishers.com/r/H5682AD8F61EN.html>

Date: February 2016

Pages: 139

Price: US\$ 5,650.00 (Single User License)

ID: H5682AD8F61EN

Abstracts

“The heat recovery steam generator market to grow at a CAGR of 3.7% during the forecast period”

The heat recovery steam generator market is expected to reach a value of USD 888.20 million by 2020, at a CAGR of 3.7% from 2015 to 2020. Increasing demand for electric power worldwide and subsequent investments in creating new generating capacity, efforts taken globally to reduce carbon emissions, and growing adoption of CCPP & CHP are driving the market globally. The shale gas boom & upgrade of aging existing thermal power plants in North America and decommissioning of nuclear plants in Europe could boost the demand for heat recovery steam generators in the two regions. In Asia-Pacific and RoW, the demand for heat recovery steam generators would be influenced by the upcoming new gas-fired power plants.

“The utilities segment would dominate the global market”

The utilities segment is estimated to account for more than 50% of the global heat recovery steam generator market in 2015. Increased primary energy consumption and governments providing incentives have paved way for several private players to set up power generation plants to cater to domestic demands. With growing concerns towards environmental conservation and curbing carbon emissions, clean tech power generation

has received a big incentive push globally. This has resulted in an increase in the number of CCPP and CHP plants.

“Europe: The largest market for heat recovery steam generators”

Europe is currently the largest market for heat recovery steam generators, followed by Asia-Pacific and North America. The U.K. accounted for the majority share in Europe in 2014, while Russia is projected to grow at the highest CAGR from 2015 to 2020. Europe has the highest number of CHP plants, which further boosts the demand for heat recovery steam generators, and Russia is the market leader for CHP in the region. Asia-Pacific is the fastest growing market for heat recovery steam generators. In countries such as China and India, factors such as strong growth in demand for electricity fuelled by high levels of urbanization, industrialization, & infrastructural developments and subsequent investments in developing new large gas-fired combined cycle power generation, apart from other power plants, would spur the demand for heat recovery steam generators.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject matter experts, C-level executives of key market players, and industry consultants among other experts to obtain & verify critical qualitative and quantitative information as well as assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1 – 55%, Tier 2 – 20% and Tier 3 – 25%

By Designation: C-Level – 35%, Director Level – 25% and Others* – 40%

By Region: Asia-Pacific – 40%, Middle East & Africa – 30%, Europe – 20% and Americas – 10%

Note: *Others include sales managers, marketing managers, and product managers

The tier of the companies has been defined on the basis of their total revenue, as of 2014: Tier 1 =>USD 5 billion, Tier 2 = USD 1 billion to USD 5 billion, and Tier 3 = USD 1 billion

Leading players of this industry have been profiled with their recent developments and

other strategic activities. These include General Electric Company (U.S.), Siemens AG (Germany), Amec Foster Wheeler plc. (U.K.), Babcock & Wilcox Company (U.S.), CMI Group (Belgium), and Doosan Engineering & Construction Co., Ltd. (South Korea) among others.

Why buy this report?

1. The report identifies and addresses key markets for heat recovery steam generator, which is useful for suppliers and OEMs to review production and distribution plans.
2. The report includes analysis of key countries by technological application of heat recovery steam generators; for instance, its application in CHP and combined cycle power plants. It analyzes historical trends and also forecast for 2020, assisting in strategic decision making.
3. It presents competition by analyzing recent market developments such as key contracts, expansions, and mergers & acquisitions from the key global market players. It helps understand the competition strategies and plan respective initiatives.

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