

# **Industrial Boilers Market by Fuel (Natural Gas, Coal, Oil), Boiler (Fire-Tube, Water Tube), Function (Hot Water, Steam), Boiler Horsepower (10-150 BHP, 151-300 BHP, 301-600 BHP), End-Use Industry, And Region - Global Forecast to 2030**

<https://marketpublishers.com/r/I9B0ECBF87CEN.html>

Date: March 2023

Pages: 229

Price: US\$ 4,950.00 (Single User License)

ID: I9B0ECBF87CEN

## **Abstracts**

The global market size of industrial boilers is projected to grow from USD 15.3 billion in 2022 to USD 19.8 billion by 2030, at a CAGR of 3.3% during the forecast period. The stringent government regulations designed to minimize carbon emissions and maximize the use of renewable energy drives increased demand for power and food industries, as well as the use of clean technology in the chemical industry. This market is predicted to grow rapidly in the coming years.

In terms of value, water-tube accounts for the fastest-growing segment in industrial boilers market, by boiler type, during the forecast period.

The water-tube boiler segment is the fastest-growing application type of industrial boiler. In terms of value, it is projected to register a CAGR of 3.7% between 2022 and 2030. Water-tube boilers are particularly attractive in applications that require dry, high-pressure, high-energy steam, including steam turbine power generation. Water-tube industrial boilers are preferred in various industrial applications, such as chemical processing, pulp & paper, and refining units. They can be easily replaced or repaired.

In terms of value, coal is estimated to be account for sluggish growing segment in industrial boilers market, by fuel type, during the forecast period.

Coal is estimated to witness sluggish growth in the market during 2022-2030. This is attributed to the increasing demand for renewables. However, coal is widely available

for industrial boilers and is more economical than other fuel types, such as nuclear energy and biomass.

In terms of value, 10-150 BHP is estimated to be third fastest-growing segment in industrial boilers market, by boiler horsepower type, during the forecast period.

The 10-150 BHP boilers segment is the third fastest-growing boiler horsepower type of industrial boiler. In terms of value, it is projected to register a CAGR of 2.9% between 2022 and 2030. Small-sized industrial boilers range from 10–150 BHP in terms of capacity and are used for steam and hot water applications in various industries like food processing & paper & pulp. They are available in standard designs based on their sizes with low customizations. These boilers are easy to install and are the highest manufactured industrial boilers worldwide. They are used in factories, schools, hospitals, and other large buildings requiring efficient heating.

In terms of value, hot-water is estimated to fastest growing segment in industrial boilers market, by function type, during the forecast period.

The hot water boilers segment is the fastest-growing function type of industrial boiler. In terms of value, it is projected to register a CAGR of 3.8% between 2022 and 2030. Hot water boilers are used in residential, commercial, and institutional buildings. These boilers are designed to operate on various fuel types such as heavy oil, light oil, gas, dual fuel, coal, husk, and other agro-waste fuels. They offer high efficiency, low maintenance, and good durability.

In terms of value, paper & pulp is estimated to be third fastest-growing segment in industrial boilers market, by end use, during the forecast period.

Paper & pulp is the third fastest growing segment by end-use during the forecast period 2022-2030. Industrial boilers generate steam for power and process systems in the paper industry. The high-pressure steam is used in steam turbines to generate electricity for the paper mill. The pulp & paper industry requires medium and low-pressure steam for various process applications, such as heating and cooking the wood chips to make wood pulp. In paper mills, steam is used in other applications such as heating chemicals, dryer drums, and other processes.

North America region accounted for the third-fastest growing segment in the industrial boilers market by value.

North America is the third-largest industrial boilers market in terms of value, in 2022. The countries in the region have already started implementing new regulations that promote the wide use of renewable fuels based boilers. North America houses many industrial boilers manufacturers. The region relies heavily on coal and gas for electricity generation. However, with the new regulations in compliance with the US Environmental Protection Agency's Mercury and Air Toxics Standards, net coal production capacity decreased by nearly 60 gigawatts (GW). It is further estimated that between 2017 and 2030, an additional 65 GW of coal-fired generating capacity would shut down due to competitively priced natural gas and increasing energy generation from renewable sources.

### Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the industrial boilers market, and information was gathered from secondary research to determine and verify the market size of several segments. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 30%, Tier 2 – 35%, and Tier 3 – 35%

By Designation: C Level Executives– 20%, Directors – 40%, and Others – 40%

By Region: Asia Pacific – 50%, Europe – 20%, North America – 10%, the Middle East & Africa – 10%, and South America- 10%

Babcock & Wilcox Enterprises INC (US), Siemens AG (Germany), John Wood Group PLC (UK), Dongfang Electric Corporation Limited (DEC LTD) (China), Mitsubishi Power (Japan), Thermax Limited (India), Sofinter Group (Italy), Bharat Heavy Electricals Limited (BHEL) (India), Harbin Electric Company Limited (China), IHI Corporation (Japan), Alfa Laval AB (Sweden), Andritz AG (Austria), Robert Bosch GMBH (Germany), Cleaver Brooks Inc. (US), and Byworth Boilers Limited (UK) are the key players in the industrial boilers market

### Research Coverage:

This research report categorizes the industrial boilers market based on fuel type, boiler type, function type, boiler horse type, end use, and region. Based on fuel type, the

market has been segmented into coal, natural gas, oil & others. Based on boiler type, the market has been segmented into fire-tube boilers & water-tube boilers. Based on the function type, industrial boilers have been segmented into steam & hot-water boilers. Based on the boiler horsepower type, industrial boilers are segmented into 10-150 BHP, 151-300 BHP, 301-600 BHP & Above 600 BHP. Based on end-use industry, the market has been segmented into chemicals & petrochemicals, food, metals & mining, power generation and others. Based on region, the industrial boilers market has been segmented into Asia Pacific, North America, Europe, the Middle East & Africa, and South America. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; new product launches, investment & expansions, mergers & collaborations; and recent developments associated with the industrial boilers market.

#### Key Benefits of Buying the Report:

From an insight perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market ranking of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the industrial boilers Insulation market; high growth regions; and market drivers, restraints, opportunities, and challenges.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### TABLE 1 INDUSTRIAL BOILERS: DEFINITION

###### 1.2.1 INCLUSIONS AND EXCLUSIONS

##### TABLE 2 INDUSTRIAL BOILERS MARKET: INCLUSIONS AND EXCLUSIONS

#### 1.3 STUDY SCOPE

##### 1.3.1 MARKETS COVERED

##### FIGURE 1 INDUSTRIAL BOILERS: MARKET SEGMENTATION

###### 1.3.2 REGIONS COVERED

###### 1.3.3 YEARS CONSIDERED

#### 1.4 CURRENCY CONSIDERED

#### 1.5 UNITS CONSIDERED

#### 1.6 STAKEHOLDERS

#### 1.7 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

##### FIGURE 2 INDUSTRIAL BOILERS MARKET: RESEARCH DESIGN

###### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Key data from secondary sources

###### 2.1.2 PRIMARY DATA

###### 2.1.2.1 Key data from primary sources

###### 2.1.3 PRIMARY INTERVIEWS

###### 2.1.3.1 Primary interviews—demand and supply sides

###### 2.1.3.2 Key industry insights

###### 2.1.3.3 Breakdown of primary interviews

#### 2.2 MARKET SIZE ESTIMATION

##### 2.2.1 TOP-DOWN APPROACH

##### FIGURE 3 MARKET SIZE ESTIMATION APPROACH

###### 2.2.1.1 Arriving at market size using bottom-up approach

##### FIGURE 4 BOTTOM-UP APPROACH

##### 2.2.2 TOP-DOWN APPROACH

###### 2.2.2.1 Arriving at market size using top-down approach

##### FIGURE 5 TOP-DOWN APPROACH

## 2.3 DATA TRIANGULATION

FIGURE 6 INDUSTRIAL BOILERS MARKET: DATA TRIANGULATION

## 2.4 FACTOR ANALYSIS

FIGURE 7 INDUSTRIAL BOILERS MARKET: FACTOR ANALYSIS

## 2.5 RESEARCH ASSUMPTIONS

## 2.6 LIMITATIONS AND RISKS

# 3 EXECUTIVE SUMMARY

FIGURE 8 COAL SEGMENT TO REGISTER SLUGGISH MARKET GROWTH DURING FORECAST PERIOD

FIGURE 9 FIRE-TUBE TO DOMINATE BOILER TYPE DURING FORECAST PERIOD

FIGURE 10 STEAM BOILERS SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 11 10–150 BHP SEGMENT TO DOMINATE DURING FORECAST PERIOD

FIGURE 12 CHEMICALS & PETROCHEMICALS TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

FIGURE 13 ASIA PACIFIC TO ACCOUNT FOR LARGEST MARKET SHARE

# 4 PREMIUM INSIGHTS

4.1 EMERGING ECONOMIES TO WITNESS HIGH GROWTH IN INDUSTRIAL BOILERS MARKET

FIGURE 14 ASIA PACIFIC TO REGISTER HIGHEST GROWTH DURING FORECAST PERIOD

4.2 INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE

FIGURE 15 STEAM BOILERS TO BE FASTEST GROWING FUNCTION TYPE DURING FORECAST PERIOD

4.3 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE

FIGURE 16 WATER-TUBE BOILERS TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD

4.4 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE

FIGURE 17 COAL-FUELED BOILERS TO REGISTER SLUGGISH GROWTH DURING FORECAST PERIOD

4.5 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER

FIGURE 18 ABOVE 600 BHP TO BE FASTEST GROWING BOILER HORSEPOWER TYPE DURING FORECAST PERIOD

4.6 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY

FIGURE 19 POWER GENERATION TO REGISTER HIGHEST CAGR DURING

## FORECAST PERIOD

### 4.7 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY AND COUNTRY

FIGURE 20 CHEMICALS & PETROCHEMICALS INDUSTRY AND CHINA ACCOUNTED FOR LARGEST MARKET SHARE

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 21 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN INDUSTRIAL BOILERS MARKET

#### 5.2.1 DRIVERS

5.2.1.1 Government policies to increase requirements for industrial boilers

5.2.1.2 Increasing demand from power and food & beverage industries

5.2.1.3 High demand for clean technology from chemical industries

#### 5.2.2 RESTRAINTS

5.2.2.1 Significant capital investment and high installation and maintenance cost

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Adoption of biomass boilers to achieve low carbon emission targets  
FIGURE 22 ENERGY PRODUCED FROM BIOMASS (2005–2019) (TWH)

5.2.3.2 Replacement of aging boilers and adoption of supercritical and ultra-supercritical boilers

5.2.3.3 Increasing demand for compact designs and lean operations

#### 5.2.4 CHALLENGES

5.2.4.1 Stringent regulations and emission control

5.2.4.2 Increasing energy prices

### 5.3 PATENT ANALYSIS

#### 5.3.1 METHODOLOGY

#### 5.3.2 GLOBAL PATENT ANALYSIS

TABLE 3 PATENT COUNT

FIGURE 23 TOTAL NUMBER OF PATENTS

#### 5.3.3 PUBLICATION TRENDS

FIGURE 24 TOTAL NUMBER OF PATENTS IN LAST 10 YEARS

#### 5.3.4 INSIGHTS

#### 5.3.5 LEGAL STATUS

FIGURE 25 PATENT ANALYSIS, BY LEGAL STATUS

#### 5.3.6 JURISDICTION-WISE PATENT ANALYSIS

**FIGURE 26 TOP JURISDICTIONS FOR INDUSTRIAL BOILER PATENTS****5.3.7 TOP COMPANIES/APPLICANTS****FIGURE 27 TOP 10 COMPANIES/APPLICANTS WITH HIGHEST NUMBER OF PATENTS****5.3.8 LEADING PATENT OWNERS (US)****TABLE 4 TOP 10 PATENT OWNERS, 2012–2022****5.4 ECOSYSTEM MAPPING****FIGURE 28 INDUSTRIAL BOILERS ECOSYSTEM****TABLE 5 INDUSTRIAL BOILERS: ECOSYSTEM****5.5 VALUE CHAIN ANALYSIS****FIGURE 29 VALUE CHAIN ANALYSIS****5.5.1 RAW MATERIAL SUPPLIERS****5.5.2 MANUFACTURERS****5.5.3 DISTRIBUTORS****5.5.4 END USERS****5.6 TECHNOLOGY ANALYSIS****5.6.1 LOW NOX BOILERS****5.6.2 INDUSTRIAL INTERNET OF THINGS****5.6.3 REMOTE MONITORING****5.7 PRICING ANALYSIS****5.7.1 AVERAGE SELLING PRICE BY REGION****FIGURE 30 INDUSTRIAL BOILERS PRICES IN DIFFERENT REGIONS, 2021****FIGURE 31 AVERAGE SELLING PRICE OF KEY PLAYERS FOR TOP THREE END-USE SEGMENTS****5.7.2 AVERAGE SELLING PRICE BY KEY PLAYERS****TABLE 6 KEY PLAYERS: AVERAGE SELLING PRICE (USD '000/UNITS)****5.8 PORTER'S FIVE FORCES ANALYSIS****FIGURE 32 INDUSTRIAL BOILERS MARKET: PORTER'S FIVE FORCES ANALYSIS****5.8.1 THREAT OF SUBSTITUTES****5.8.2 BARGAINING POWER OF SUPPLIERS****5.8.3 THREAT OF NEW ENTRANTS****5.8.4 BARGAINING POWER OF BUYERS****5.8.5 INTENSITY OF COMPETITIVE RIVALRY****TABLE 7 INDUSTRIAL BOILERS: PORTER'S FIVE FORCES ANALYSIS****5.9 TRADE ANALYSIS****5.9.1 IMPORT–EXPORT SCENARIO OF INDUSTRIAL BOILERS MARKET****TABLE 8 IMPORT TRADE DATA FOR INDUSTRIAL BOILERS****TABLE 9 EXPORT TRADE DATA FOR INDUSTRIAL BOILERS****5.10 MACROECONOMIC INDICATORS**

#### 5.10.1 GDP TRENDS AND FORECASTS

TABLE 10 PROJECTED REAL GDP GROWTH (ANNUAL PERCENT CHANGE) OF KEY COUNTRIES, 2018–2025

#### 5.11 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 33 IMPACT OF TRENDS AND DISRUPTIONS ON CUSTOMERS' BUSINESSES

#### 5.12 KEY CONFERENCES AND EVENTS, 2023–2024

TABLE 11 INDUSTRIAL BOILERS MARKET: CONFERENCES AND EVENTS

#### 5.13 RECESSION IMPACT

#### 5.14 TARIFF AND REGULATIONS

##### 5.14.1 NORTH AMERICA

##### 5.14.2 EUROPE

##### 5.14.3 ASIA

#### 5.15 CASE STUDY ANALYSIS

5.15.1 BYWORTH'S FELLSMAN HOT WATER BOILER FOR SHEFFIELD WEDNESDAY FOOTBALL CLUB

5.15.2 THERMAX'S CPFD FOR GOVIND DAIRY PHALTAN

## 6 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE

### 6.1 INTRODUCTION

FIGURE 34 NATURAL GAS SEGMENT TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD

TABLE 12 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 (USD MILLION)

TABLE 13 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 (USD MILLION)

TABLE 14 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 ('000 UNITS)

TABLE 15 INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 ('000 UNITS)

### 6.2 NATURAL GAS

6.2.1 REGULATORY GUIDELINES CONCERNING CO<sub>2</sub> EMISSIONS TO DRIVE MARKET

### 6.3 COAL

6.3.1 ASIA PACIFIC TO DOMINATE COAL-FIRED INDUSTRIAL BOILERS MARKET

### 6.4 OIL

6.4.1 HIGH AVAILABILITY OF CRUDE OIL EXPECTED TO FUEL MARKET GROWTH

## 6.5 OTHERS

## 7 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE

### 7.1 INTRODUCTION

FIGURE 35 FIRE-TUBE BOILERS SEGMENT PROJECTED TO DOMINATE DURING FORECAST PERIOD

TABLE 16 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 (USD MILLION)

TABLE 17 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 (USD MILLION)

TABLE 18 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 ('000 UNITS)

TABLE 19 INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 ('000 UNITS)

### 7.2 FIRE-TUBE

7.2.1 FUEL-EFFICIENT FIRE-TUBE BOILERS EASIER TO OPERATE

### 7.3 WATER-TUBE

7.3.1 WATER-TUBE BOILERS TO BE HIGHLY EFFICACIOUS

### 7.4 OTHERS

## 8 INDUSTRIAL BOILERS MARKET, BY FUNCTION

### 8.1 INTRODUCTION

FIGURE 36 STEAM BOILERS TO DOMINATE DURING FORECAST PERIOD

TABLE 20 INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 21 INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 22 INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 ('000 UNITS)

TABLE 23 INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 ('000 UNITS)

### 8.2 HOT WATER

8.2.1 HIGH-TEMPERATURE HOT WATER BOILERS IDEAL FOR LARGER SYSTEMS

### 8.3 STEAM

8.3.1 STEAM BOILERS PREFERRED IN TURBINE AND POWER INDUSTRIES

## **9 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER**

### **9.1 INTRODUCTION**

FIGURE 37 10–150 BHP SEGMENT PROJECTED TO DOMINATE DURING FORECAST PERIOD

TABLE 24 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 25 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 26 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 ('000 UNITS)

TABLE 27 INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 ('000 UNITS)

### **9.2 10–150 BHP**

9.2.1 ASIA PACIFIC TO HOLD LARGEST MARKET SHARE FOR 10–150 BHP INDUSTRIAL BOILERS

### **9.3 151–300 BHP**

9.3.1 PRECISE PRESSURE AND TEMPERATURE REQUIREMENT ACROSS END-USE INDUSTRIES TO FUEL MARKET GROWTH

### **9.4 301–600 BHP**

9.4.1 INCREASING DEMAND FOR HIGH-PRESSURE STEAM OUTPUT TO PROPEL SEGMENT GROWTH

## **10 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY**

### **10.1 INTRODUCTION**

FIGURE 38 CHEMICALS & PETROCHEMICALS SEGMENT PROJECTED TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD

TABLE 28 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 29 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

TABLE 30 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 ('000 UNITS)

TABLE 31 INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 ('000 UNITS)

### **10.2 CHEMICALS & PETROCHEMICALS**

10.2.1 HIGH DEMAND FOR BULK CHEMICALS IN EMERGING ECONOMIES TO PROPEL SEGMENT GROWTH

### 10.3 FOOD

10.3.1 INCREASING DEMAND FOR PACKAGED FOODS TO FUEL SEGMENT GROWTH

### 10.4 PULP & PAPER

10.4.1 HIGH DEMAND FOR PAPER IN ASIA PACIFIC TO BOOST INDUSTRIAL GROWTH

### 10.5 METALS & MINING

10.5.1 INCREASING DEMAND FOR STEEL AND MINING INDUSTRIES TO DRIVE MARKET

### 10.6 POWER GENERATION

10.6.1 POWER GENERATION SEGMENT TO ENCOUNTER RAPID GROWTH DURING FORECAST PERIOD

### 10.7 OTHERS

## 11 REGIONAL ANALYSIS

### 11.1 INTRODUCTION

FIGURE 39 INDUSTRIAL BOILERS MARKET IN INDIA PROJECTED TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

TABLE 32 INDUSTRIAL BOILERS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 33 INDUSTRIAL BOILERS MARKET, BY REGION, 2022–2030 (USD MILLION)

TABLE 34 INDUSTRIAL BOILERS MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 35 INDUSTRIAL BOILERS MARKET, BY REGION, 2022–2030 ('000 UNITS)

### 11.2 ASIA PACIFIC

FIGURE 40 ASIA PACIFIC INDUSTRIAL BOILERS MARKET SNAPSHOT

TABLE 36 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 37 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 (USD MILLION)

TABLE 38 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 39 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 ('000 UNITS)

TABLE 40 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 (USD MILLION)

TABLE 41 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 (USD MILLION)

TABLE 42 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 (USD MILLION)

TABLE 43 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 (USD MILLION)

TABLE 44 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 45 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 46 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 47 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 48 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 49 ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.2.1 CHINA

11.2.1.1 Replacing coal-fired boilers by gas-fired boilers to fuel segment growth

TABLE 50 CHINA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 51 CHINA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 52 CHINA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 53 CHINA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.2.2 INDIA

11.2.2.1 Increased demand from chemical industry to drive market

TABLE 54 INDIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 55 INDIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 56 INDIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 57 INDIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.2.3 JAPAN

11.2.3.1 Increasing use of boilers in food & chemical end-use industry to propel market

TABLE 58 JAPAN: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 59 JAPAN: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 60 JAPAN: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2018–2021 (USD MILLION)

TABLE 61 JAPAN: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.2.4 SOUTH KOREA

11.2.4.1 Replacing coal-fired plants with LNG-based plants to achieve carbon  
neutrality

TABLE 62 SOUTH KOREA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2018–2021 (USD MILLION)

TABLE 63 SOUTH KOREA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 64 SOUTH KOREA: INDUSTRIAL BOILERS MARKET, BY END-USE  
INDUSTRY, 2018–2021 (USD MILLION)

TABLE 65 SOUTH KOREA: INDUSTRIAL BOILERS MARKET, BY END-USE  
INDUSTRY, 2022–2030 (USD MILLION)

#### 11.2.5 MALAYSIA

11.2.5.1 Rising demand for food products to propel market

TABLE 66 MALAYSIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2018–2021 (USD MILLION)

TABLE 67 MALAYSIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 68 MALAYSIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2018–2021 (USD MILLION)

TABLE 69 MALAYSIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.2.6 AUSTRALIA

11.2.6.1 Adoption of renewable resources to meet electricity requirement

TABLE 70 AUSTRALIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2018–2021 (USD MILLION)

TABLE 71 AUSTRALIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 72 AUSTRALIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2018–2021 (USD MILLION)

TABLE 73 AUSTRALIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.2.7 REST OF ASIA PACIFIC

11.2.7.1 Growth in chemical industries to drive market

TABLE 74 REST OF ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 75 REST OF ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 76 REST OF ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 77 REST OF ASIA PACIFIC: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

### 11.3 EUROPE

FIGURE 41 EUROPE INDUSTRIAL BOILERS MARKET SNAPSHOT

TABLE 78 EUROPE: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 79 EUROPE: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 (USD MILLION)

TABLE 80 EUROPE: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 81 EUROPE: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 ('000 UNITS)

TABLE 82 EUROPE: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 (USD MILLION)

TABLE 83 EUROPE: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 (USD MILLION)

TABLE 84 EUROPE: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 (USD MILLION)

TABLE 85 EUROPE: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 (USD MILLION)

TABLE 86 EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 87 EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 88 EUROPE: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 89 EUROPE: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 90 EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 91 EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.1 GERMANY

#### 11.3.1.1 Advancements in high-value fine chemicals to propel market

TABLE 92 GERMANY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 93 GERMANY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 94 GERMANY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 95 GERMANY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.2 UK

11.3.2.1 Reducing carbon emissions to boost demand for hydrogen-fired industrial boilers

TABLE 96 UK: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 97 UK: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 98 UK: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 99 UK: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.3 FRANCE

##### 11.3.3.1 Rising demand from chemical industry to drive market

TABLE 100 FRANCE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 101 FRANCE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 102 FRANCE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 103 FRANCE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.4 ITALY

##### 11.3.4.1 Growth of food industries to increase demand for industrial boilers

TABLE 104 ITALY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 105 ITALY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 106 ITALY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 107 ITALY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,

2022–2030 (USD MILLION)

#### 11.3.5 TURKEY

11.3.5.1 Demand for processed food products to drive market

TABLE 108 TURKEY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 109 TURKEY: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 110 TURKEY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 111 TURKEY: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.6 EASTERN EUROPE

11.3.6.1 Growing demand for industrial boilers in food end-use industry to fuel market growth

TABLE 112 EASTERN EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 113 EASTERN EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 114 EASTERN EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 115 EASTERN EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.3.7 REST OF EUROPE

11.3.7.1 Increasing demand for chemicals and food products to propel market

TABLE 116 REST OF EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 117 REST OF EUROPE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 118 REST OF EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 119 REST OF EUROPE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.4 NORTH AMERICA

TABLE 120 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 121 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 (USD MILLION)

TABLE 122 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 123 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 ('000 UNITS)

TABLE 124 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 (USD MILLION)

TABLE 125 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 (USD MILLION)

TABLE 126 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 (USD MILLION)

TABLE 127 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 (USD MILLION)

TABLE 128 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 129 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 130 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 131 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 132 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 133 NORTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.4.1 US

11.4.1.1 Adoption of natural gas-fired boilers to meet clean energy requirement

TABLE 134 US: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 135 US: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 136 US: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 137 US: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.4.2 CANADA

11.4.2.1 Significant presence of food processing companies to drive market

TABLE 138 CANADA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 139 CANADA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 140 CANADA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,

2018–2021 (USD MILLION)

TABLE 141 CANADA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.4.3 MEXICO

11.4.3.1 Rising demand from chemical segment to propel market

TABLE 142 MEXICO: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2018–2021 (USD MILLION)

TABLE 143 MEXICO: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 144 MEXICO: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2018–2021 (USD MILLION)

TABLE 145 MEXICO: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.5 MIDDLE EAST & AFRICA

TABLE 146 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
COUNTRY, 2018–2021 (USD MILLION)

TABLE 147 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
COUNTRY, 2022–2030 (USD MILLION)

TABLE 148 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
COUNTRY, 2018–2021 ('000 UNITS)

TABLE 149 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
COUNTRY, 2022–2030 ('000 UNITS)

TABLE 150 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY BOILER  
TYPE, 2018–2021 (USD MILLION)

TABLE 151 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY BOILER  
TYPE, 2022–2030 (USD MILLION)

TABLE 152 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY FUEL  
TYPE, 2018–2021 (USD MILLION)

TABLE 153 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY FUEL  
TYPE, 2022–2030 (USD MILLION)

TABLE 154 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 155 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY  
FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 156 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY BOILER  
HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 157 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY BOILER  
HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 158 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY END-

USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 159 MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.5.1 SAUDI ARABIA

11.5.1.1 Thermal energy consumption in chemical industries to fuel market growth

TABLE 160 SAUDI ARABIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 161 SAUDI ARABIA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 162 SAUDI ARABIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 163 SAUDI ARABIA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.5.2 UAE

11.5.2.1 Increasing demand for basic chemicals, polymers, and fertilizers to fuel segment growth

TABLE 164 UAE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 165 UAE: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 166 UAE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 167 UAE: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.5.3 EGYPT

11.5.3.1 Production of domestic fossil gas to reduce carbon consumption

TABLE 168 EGYPT: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 169 EGYPT: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 170 EGYPT: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 171 EGYPT: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.5.4 REST OF MIDDLE EAST & AFRICA

11.5.4.1 Increasing demand for industrial chemicals and fertilizers to fuel market growth

TABLE 172 REST OF MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 173 REST OF MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 174 REST OF MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 175 REST OF MIDDLE EAST & AFRICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

#### 11.6 SOUTH AMERICA

TABLE 176 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 177 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 (USD MILLION)

TABLE 178 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 179 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY COUNTRY, 2022–2030 ('000 UNITS)

TABLE 180 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2018–2021 (USD MILLION)

TABLE 181 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER TYPE, 2022–2030 (USD MILLION)

TABLE 182 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2018–2021 (USD MILLION)

TABLE 183 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUEL TYPE, 2022–2030 (USD MILLION)

TABLE 184 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 185 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 186 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2018–2021 (USD MILLION)

TABLE 187 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY BOILER HORSEPOWER, 2022–2030 (USD MILLION)

TABLE 188 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 189 SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY, 2022–2030 (USD MILLION)

##### 11.6.1 BRAZIL

11.6.1.1 Extensive use of natural gas and biomass to drive market

TABLE 190 BRAZIL: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 191 BRAZIL: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 192 BRAZIL: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2018–2021 (USD MILLION)

TABLE 193 BRAZIL: INDUSTRIAL BOILERS MARKET, BY END-USE INDUSTRY,  
2022–2030 (USD MILLION)

#### 11.6.2 ARGENTINA

11.6.2.1 Adoption of renewable energy to boost market

TABLE 194 ARGENTINA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2018–2021 (USD MILLION)

TABLE 195 ARGENTINA: INDUSTRIAL BOILERS MARKET, BY FUNCTION TYPE,  
2022–2030 (USD MILLION)

TABLE 196 ARGENTINA: INDUSTRIAL BOILERS MARKET, BY END-USE  
INDUSTRY, 2018–2021 (USD MILLION)

TABLE 197 ARGENTINA: INDUSTRIAL BOILERS MARKET, BY END-USE  
INDUSTRY, 2022–2030 (USD MILLION)

#### 11.6.3 REST OF SOUTH AMERICA

11.6.3.1 Expansion of food end-use industries to fuel market growth

TABLE 198 REST OF SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY  
FUNCTION TYPE, 2018–2021 (USD MILLION)

TABLE 199 REST OF SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY  
FUNCTION TYPE, 2022–2030 (USD MILLION)

TABLE 200 REST OF SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-  
USE INDUSTRY, 2018–2021 (USD MILLION)

TABLE 201 REST OF SOUTH AMERICA: INDUSTRIAL BOILERS MARKET, BY END-  
USE INDUSTRY, 2022–2030 (USD MILLION)

## 12 COMPETITIVE LANDSCAPE

### 12.1 OVERVIEW

FIGURE 42 COMPANIES ADOPTED ACQUISITIONS AND EXPANSIONS AS KEY  
GROWTH STRATEGIES BETWEEN 2018 AND 2022

### 12.2 RANKING ANALYSIS OF KEY MARKET PLAYERS, 2022

FIGURE 43 RANKING OF TOP FIVE PLAYERS IN INDUSTRIAL BOILERS MARKET,  
2022

### 12.3 MARKET SHARE ANALYSIS

FIGURE 44 INDUSTRIAL BOILERS MARKET SHARE, BY COMPANY, 2021

TABLE 202 INDUSTRIAL BOILERS MARKET: DEGREE OF COMPETITION

### 12.4 REVENUE ANALYSIS OF TOP PLAYERS

**TABLE 203 INDUSTRIAL BOILERS MARKET: REVENUE ANALYSIS (USD)****12.5 MARKET EVALUATION MATRIX****TABLE 204 MARKET EVALUATION MATRIX****12.6 COMPANY EVALUATION MATRIX, 2022 (TIER 1)****12.6.1 STARS****12.6.2 EMERGING LEADERS****12.6.3 PERVASIVE PLAYERS****12.6.4 PARTICIPANTS****FIGURE 45 INDUSTRIAL BOILERS MARKET: COMPANY EVALUATION MATRIX, 2022****12.7 STARTUP AND SME EVALUATION MATRIX****12.7.1 RESPONSIVE COMPANIES****12.7.2 STARTING BLOCKS****12.7.3 PROGRESSIVE COMPANIES****12.7.4 DYNAMIC COMPANIES****FIGURE 46 INDUSTRIAL BOILERS MARKET: STARTUPS AND SMES MATRIX, 2022****12.8 COMPANY END-USE INDUSTRY FOOTPRINT****12.9 COMPANY REGION FOOTPRINT****12.10 STRENGTH OF PRODUCT PORTFOLIO****12.11 BUSINESS STRATEGY EXCELLENCE****12.12 COMPETITIVE SCENARIO****12.12.1 PRODUCT LAUNCHES****TABLE 205 PRODUCT LAUNCHES, 2018–2022****12.12.2 DEALS****TABLE 206 DEALS, 2018–2022****12.12.3 OTHER DEVELOPMENTS****TABLE 207 OTHER DEVELOPMENTS, 2018–2021****13 COMPANY PROFILES**

(Business Overview, Products/Solutions/Services offered, Recent Developments, Deals, MnM view, Key strengths, Strategic choices, Weakness and competitive threats)\*

**13.1 MAJOR PLAYERS****13.1.1 BABCOCK & WILCOX ENTERPRISES, INC.****TABLE 208 BABCOCK & WILCOX ENTERPRISES, INC.: COMPANY OVERVIEW****FIGURE 47 BABCOCK & WILCOX ENTERPRISES, INC.: COMPANY SNAPSHOT****TABLE 209 BABCOCK & WILCOX ENTERPRISES, INC.: DEALS****13.1.2 SIEMENS AG**

TABLE 210 SIEMENS AG: COMPANY OVERVIEW

FIGURE 48 SIEMENS AG: COMPANY SNAPSHOT

TABLE 211 SIEMENS AG: PRODUCT OFFERINGS

TABLE 212 SIEMENS AG: DEALS

#### 13.1.3 JOHN WOOD PLC

TABLE 213 JOHN WOOD GROUP PLC: COMPANY OVERVIEW

FIGURE 49 JOHN WOOD GROUP PLC: COMPANY SNAPSHOT

TABLE 214 JOHN WOOD GROUP PLC: PRODUCT OFFERINGS

TABLE 215 JOHN WOOD GROUP PLC: DEALS

#### 13.1.4 DONGFANG ELECTRIC CORPORATION LIMITED

TABLE 216 DONGFANG ELECTRIC CORPORATION LIMITED: COMPANY OVERVIEW

TABLE 217 DONGFANG ELECTRIC CORPORATION LIMITED: PRODUCT OFFERINGS

TABLE 218 DONGFANG ELECTRIC CORPORATION LIMITED: DEALS

#### 13.1.5 ROBERT BOSCH GMBH

TABLE 219 ROBERT BOSCH GMBH: COMPANY OVERVIEW

FIGURE 50 ROBERT BOSCH GMBH: COMPANY SNAPSHOT

TABLE 220 ROBERT BOSCH GMBH: PRODUCTS OFFERED

TABLE 221 ROBERT BOSCH GMBH: PRODUCT LAUNCHES

#### 13.1.6 MITSUBISHI POWER

TABLE 222 MITSUBISHI POWER: COMPANY OVERVIEW

TABLE 223 MITSUBISHI POWER: PRODUCT OFFERINGS

TABLE 224 MITSUBISHI POWER: PRODUCT LAUNCHES

TABLE 225 MITSUBISHI POWER: DEALS

#### 13.1.7 THERMAX LIMITED

TABLE 226 THERMAX LIMITED: COMPANY OVERVIEW

FIGURE 51 THERMAX LIMITED: COMPANY SNAPSHOT

TABLE 227 THERMAX LIMITED: PRODUCT OFFERINGS

TABLE 228 THERMAX LIMITED: DEALS

#### 13.1.8 SOFINTER GROUP

TABLE 229 SOFINTER GROUP: COMPANY OVERVIEW

TABLE 230 SOFINTER GROUP: PRODUCT OFFERINGS

#### 13.1.9 BHARAT HEAVY ELECTRICALS LIMITED

TABLE 231 BHARAT HEAVY ELECTRICALS LIMITED: COMPANY OVERVIEW

FIGURE 52 BHARAT HEAVY ELECTRICALS LIMITED: COMPANY SNAPSHOT

TABLE 232 BHARAT HEAVY ELECTRICALS LIMITED: PRODUCT OFFERINGS

TABLE 233 BHARAT HEAVY ELECTRICALS LIMITED: DEALS

#### 13.1.10 CLEAVER-BROOKS, INC.

TABLE 234 CLEAVER-BROOKS, INC.: COMPANY OVERVIEW

TABLE 235 CLEAVER-BROOKS, INC.: PRODUCTS OFFERED

TABLE 236 CLEAVER-BROOKS, INC.: PRODUCT LAUNCHES

13.1.11 BYWORTH BOILERS LTD.

TABLE 237 BYWORTH BOILERS LTD.: COMPANY OVERVIEW

TABLE 238 BYWORTH BOILERS LTD.: PRODUCTS OFFERED

13.1.12 ANDRITZ AG

TABLE 239 ANDRITZ AG: COMPANY OVERVIEW

FIGURE 53 ANDRITZ AG: COMPANY SNAPSHOT

TABLE 240 ANDRITZ AG: PRODUCT OFFERINGS

13.1.13 HARBIN ELECTRIC COMPANY LIMITED

TABLE 242 HARBIN ELECTRIC COMPANY LIMITED: COMPANY OVERVIEW

TABLE 243 HARBIN ELECTRIC COMPANY LIMITED: PRODUCT OFFERINGS

13.1.14 ALFA LAVAL AB

TABLE 244 ALFA LAVAL AB: COMPANY OVERVIEW

FIGURE 54 ALFA LAVAL AB: COMPANY SNAPSHOT

TABLE 245 ALFA LAVAL AB: PRODUCT OFFERINGS

13.1.15 IHI CORPORATION

TABLE 246 IHI CORPORATION: COMPANY OVERVIEW

FIGURE 55 IHI CORPORATION: COMPANY SNAPSHOT

TABLE 247 IHI CORPORATION: PRODUCT OFFERINGS

TABLE 249 IHI CORPORATION: OTHER DEVELOPMENTS

\*Details on Business Overview, Products/Solutions/Services offered, Recent Developments, Deals, MnM view, Key strengths, Strategic choices, Weakness and competitive threats might not be captured in case of unlisted companies.

## 13.2 OTHER PLAYERS

13.2.1 BRYAN STEAM, LLC

13.2.2 COCHRAN LTD.

13.2.3 FORBES MARSHALL PRIVATE LIMITED

13.2.4 THE FULTON COMPANIES

13.2.5 VAPOR POWER INTERNATIONAL, LLC

13.2.6 SUPERIOR BOILER WORKS, INC.

13.2.7 HURST BOILER & WELDING COMPANY, INC.

13.2.8 JOHNSTON BOILER COMPANY

13.2.9 PARKER BOILER COMPANY

13.2.10 RENTECH BOILER SYSTEMS, INC.

## 14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

## I would like to order

Product name: Industrial Boilers Market by Fuel (Natural Gas, Coal, Oil), Boiler (Fire-Tube, Water Tube), Function (Hot Water, Steam), Boiler Horsepower (10-150 BHP, 151-300 BHP, 301-600 BHP), End-Use Industry, And Region - Global Forecast to 2030

Product link: <https://marketpublishers.com/r/I9B0ECBF87CEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/I9B0ECBF87CEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970