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Welding Fume Extraction Equipment Market Forecasts to 2032 – Global Analysis By Product (Mobile Units, Stationary Units and Large Centralized Systems), Application (Arc Welding, Resistance Welding, Laser Beam Welding, Oxy-Fuel Welding and Other Applications), End User and By Geography

https://marketpublishers.com/r/WD1AD5D531B4EN.html
Date: April 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: WD1AD5D531B4EN

Abstracts

According to Stratistics MRC, the Global Welding Fume Extraction Equipment Market is accounted for $2.32 billion in 2025 and is expected to reach $3.95 billion by 2032 growing at a CAGR of 7.9% during the forecast period. Welding fume extraction equipment is made to collect and filter dangerous gases, fumes, and particulates produced during welding operations, making the workplace safer and healthier. These systems meet various industrial needs, including downdraft tables, centralized ventilation systems, and portable fume extractors. These devices efficiently eliminate airborne pollutants by using high-efficiency filters like HEPA or activated carbon, which lowers the risk of respiratory problems and workplace hazards.

According to the Occupational Safety and Health Administration (OSHA), prolonged exposure to welding fumes may cause lung damage and increase the risk of cancer. Studies indicate that welders have a 44% higher risk of lung cancer compared to the general population.

Market Dynamics:

Driver:

Growing health issues and workplace safety programs

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Lung cancer, metal fume fever, chronic obstructive pulmonary disease (COPD), and neurological conditions like Parkinson's disease have all been related to prolonged exposure to welding fumes. Welding fumes are categorized as Group 1 carcinogens by the International Agency for Research on Cancer (IARC), which guarantees that they can cause cancer in people. Effective fume extraction solutions are in greater demand as a result of workers' and labor unions' growing awareness of these hazards. Additionally, in order to reduce legal risks and improve worker health, employers are spending money on localized extraction systems and better ventilation in the workplace.

Restraint:

High installation and initial investment costs

The high initial cost of buying and setting up these systems is one of the main factors limiting the market for welding fume extraction equipment. High-efficiency particulate air (HEPA) filters, electrostatic precipitators, and centralized ventilation systems are examples of advanced extraction solutions that come with a high cost that many small and medium-sized businesses (SMEs) cannot afford. For instance, depending on its capacity, filtration technology, and automation features, a high-performance fume extraction system may cost $5,000 to $50,000. Furthermore, deterring some businesses from investing in these systems is the high installation costs associated with customized fume extraction solutions for large manufacturing facilities.

Opportunity:

Demand for compact and transportable welding fume extraction devices

Conventional welding fume extraction systems are frequently big and fixed which makes them inappropriate for mobile work settings like shipyards, pipeline welding operations, and construction sites. As industries look for adaptable solutions that can be used in tight spaces and transported with ease, there is an increasing need for lightweight and portable fume extractors. For instance, independent welders and small workshops are increasingly using small, battery-operated welding fume extractors with flexible hose attachments and HEPA filtration. Moreover, manufacturers can capitalize on a growing market of consumers in need of portable fume control solutions by innovating in the portable extraction segment.

Threat:

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High levels of price pressure and market competition

The market is getting more and more competitive, with many regional and international companies providing a variety of fume extraction options. Manufacturers have been forced to reduce their profit margins in order to stay competitive as a result of the intense price pressure. Furthermore, it is becoming more challenging for luxury brands to hold onto their market share due to low-cost substitutes from developing nations like China and India. For instance, fume extractors from Chinese manufacturers are frequently 20–30% less expensive than those from their North American and European counterparts, making it difficult for luxury brands to compete solely on price. Without a strong emphasis on product differentiation, businesses run the risk of losing market share to less expensive rivals who provide simple fume extraction solutions.

Covid-19 Impact:

The COVID-19 pandemic affected the welding fume extraction equipment market in two ways: it raised long-term awareness of workplace safety while also causing temporary disruptions. Investments in welding fume extraction systems were postponed during the initial lockdowns in 2020 due to shutdowns and production slowdowns in important industries like manufacturing, aerospace, automotive, and construction. However, stricter workplace safety regulations, heightened awareness of airborne contaminants, and an emphasis on worker health protection resulted in a renewed demand for fume extraction systems as industries resumed operations. In order to reduce respiratory risks, government rules and occupational safety standards were also strengthened, which prompted businesses to make investments in cutting-edge ventilation and filtration systems.

The Arc Welding segment is expected to be the largest during the forecast period

The Arc Welding segment is expected to account for the largest market share during the forecast period because of its extensive use in a variety of industries, including heavy machinery manufacturing, automotive, shipbuilding, construction, and aerospace. The demand for portable, stationary, and central fume extraction units is further increased by the widespread use of MIG (Metal Inert Gas), TIG (Tungsten Inert Gas), and Stick Welding (SMAW, or shielded metal arc welding). Furthermore, the incorporation of cutting-edge ventilation technologies and growing automation in welding processes propel market expansion, solidifying Arc Welding's position as the leading market segment for welding fume extraction equipment.

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The Automotive segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Automotive segment is predicted to witness the highest growth rate, driven by strict workplace safety laws, the quick growth of the automobile industry, and the use of automation in welding processes. Automobile manufacturers are investing more in sophisticated fume extraction systems, like downdraft tables, centralized fume collection units, and high-vacuum extractors, as governments around the world impose stringent emission and worker safety regulations. Moreover, the need for effective fume extraction solutions is also being accelerated by the growing trend toward electric vehicle (EV) production, which calls for specialized welding techniques for battery enclosures and lightweight materials.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, primarily as a result of high industrialization, stringent occupational safety laws, and widespread use of cutting-edge welding technologies. The need for both stationary and portable fume extraction systems is further fueled by the existence of significant automotive, aerospace, oil and gas, and construction industries in the United States and Canada. Additionally, High-efficiency ventilation and filtration systems have also become more widely used as a result of increased automation in welding processes and growing concerns about worker health and safety.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, fueled by growing manufacturing sectors, quick industrialization, and stricter workplace safety laws. The automotive, shipbuilding, construction, and heavy machinery industries—all of which involve extensive welding processes that produce hazardous fumes—are seeing rapid growth in nations like China, India, Japan, and South Korea. Governments in the area are also enforcing stricter occupational safety regulations, which are encouraging businesses to implement sophisticated fume extraction systems.

Key players in the market

Some of the key players in Welding Fume Extraction Equipment Market include Air

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Liquide, Parker-Hannifin Corporation, Sentry Air Systems, Inc, RoboVent Products Group, Inc, Nederman Holding AB, Diversitech Equipment & Sales Ltd., Kemper Gmbh, Filcar S.p.A, Air Cleaning Specialists, Inc., Lincoln Electric Company, ESTA Extraction Technology, Bomaksan Industrial Air Filtration Systems San. Tic. A.S., Donaldson Company, Inc., Fumex, Inc. and Miller Electric Mfg LLC.

Key Developments:

In July 2024, Parker Hannifin Corporation announced it has signed an agreement to divest its North America Composites and Fuel Containment (CFC) Division to private investment firm SK Capital Partners. With the completion of this transaction the company will have successfully divested businesses and product lines over the past three years that total nearly $450 million in annual sales. The transaction is subject to customary closing conditions.

In June 2024, Air Liquide and ExxonMobil announced an agreement to support the production of low-carbon hydrogen and low-carbon ammonia at ExxonMobil’s Baytown, Texas facility. The agreement will enable transportation of low-carbon hydrogen through Air Liquide’s existing pipeline network. Additionally, Air Liquide will build and operate four Large Modular Air separation units (LMAs) to supply 9,000 metric tons of oxygen and up to 6,500 metric tons of nitrogen daily to the facility.

In May 2024, Donaldson Company, Inc and PolyPeptide Group AG announced their collaboration on the development of a production scale solvent recovery system for use in peptide purification. Peptides are used as the active pharmaceutical ingredient (API) in therapeutic areas, which continue to broaden and include metabolic disorders, oncology, infectious diseases, orphan diseases, cardiovascular, neurology or gastro-enterology applications.

Products Covered:

Mobile Units

Stationary Units

Large Centralized Systems

Applications Covered:

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- Arc Welding
- Resistance Welding
- Laser Beam Welding
- Oxy-Fuel Welding
- Other Applications

End Users Covered:

- Aerospace
- Automotive
- Building & Construction
- Energy
- Oil & Gas
- Marine
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe

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- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

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- India
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- Rest of Asia Pacific

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- Brazil
- Chile
- Rest of South America

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Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

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per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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