

Screw Compressors Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Technology (Oil-injected Screw Compressor and Oil-free Screw Compressor), Stage (Single-Stage Screw Compressors and Multi-Stage Screw Compressors), End-User Industry (Manufacturing Industry, Oil and Gas Industry, Mining Industry, Construction Industry and Other End-User Industries), By Region, Competition 2018-2028.

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Abstracts

Global Screw Compressors Market has valued at USD 10.97 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.21% through 2028, the global refining capacity accounted for 101.340 million barrels per day in 2019, with an increase of 1.5%, as compared to the previous year. Looking ahead, higher global capacity is slated to be added in the near term, which may lead the capacity to continue to outpace the demand growth. Thus, the increasing investments in infrastructure in the refinery and petrochemical sectors are expected to increase the demand for screw compressors.

Key Market Drivers

Industrial Growth

Industrial growth is a primary driver fueling the expansion of the global screw compressors market. As industries continue to evolve and expand across the globe, their demand for reliable and efficient compressed air systems, met by screw

compressors, surges. This growth encompasses a wide range of sectors, including manufacturing, automotive, petrochemical, construction, and more. In manufacturing, screw compressors play a pivotal role in powering various production processes, such as pneumatic tools, conveying systems, and assembly lines. The ability to provide a steady supply of compressed air, coupled with their energy-efficient operation, makes screw compressors a preferred choice for manufacturers seeking to optimize their operations.

The automotive industry, with its intricate assembly and painting processes, heavily relies on compressed air for precision and efficiency. Screw compressors offer the required consistency and performance, making them indispensable in this sector as it continues to expand globally. Petrochemical facilities demand compressors capable of handling the compression of gases and vapors involved in refining and petrochemical processes. Screw compressors excel in these applications due to their durability, reliability, and adaptability to high-capacity demands.

Moreover, the construction industry depends on compressed air for various tasks, including powering pneumatic tools, operating machinery, and even for cleaning and painting. As urbanization and infrastructure development projects proliferate worldwide, the need for screw compressors in construction remains substantial. The continuous growth of these industries, driven by population expansion, urbanization, and economic development, ensures a consistent demand for screw compressors. Furthermore, their role in enhancing energy efficiency aligns with industry trends focused on sustainability and cost reduction. As a result, industrial growth remains a compelling and enduring driver behind the ever-expanding global screw compressors market.

Energy Efficiency

Energy efficiency is poised to be a driving force in the global screw compressors market. As the world grapples with the dual challenges of rising energy costs and environmental concerns, industries are increasingly turning to energy-efficient solutions to meet their compressed air needs. Screw compressors, renowned for their reliability and versatility, are emerging as a key player in this transformative shift. The demand for screw compressors is surging as industries recognize their potential to significantly reduce energy consumption and operating costs. These machines employ a unique helical screw rotor design that offers enhanced efficiency compared to traditional piston compressors. The advanced technology ensures minimal energy wastage during compression, making screw compressors an attractive choice for a wide range of applications, from manufacturing and construction to healthcare and transportation.

The global push for sustainability is further propelling the adoption of energy-efficient screw compressors. Stricter environmental regulations and carbon footprint reduction targets are incentivizing businesses to invest in green technologies. Screw compressors not only minimize energy usage but also lower greenhouse gas emissions, aligning perfectly with these sustainability goals. Moreover, advancements in screw compressor technology, including variable speed drives and intelligent control systems, are enhancing their energy efficiency even further. These innovations allow compressors to adjust their output in real-time according to demand, reducing unnecessary energy consumption during periods of low usage.

In conclusion, the global screw compressors market is on the cusp of a significant growth trajectory driven by the imperative of energy efficiency. Industries worldwide are recognizing the economic and environmental benefits of adopting screw compressors, making them a pivotal component in the journey towards a more sustainable and cost-effective future. As energy efficiency continues to take center stage, screw compressors are set to play a pivotal role in meeting the evolving needs of various sectors while contributing to a greener, more energy-conscious world.

Technological Advancements

Technological advancements are poised to be a major driving force behind the growth of the global screw compressors market. As industries and businesses continually seek to optimize their operations, improve efficiency, and reduce energy consumption, the integration of cutting-edge technologies into screw compressor systems is becoming increasingly critical. One significant technological advancement shaping the screw compressors market is the proliferation of digitalization and the Industrial Internet of Things (IIoT). Smart screw compressors equipped with sensors and connectivity capabilities can now gather real-time data on performance, temperature, pressure, and other critical parameters. This data can be analyzed using advanced analytics and machine learning algorithms to predict maintenance needs, optimize operations, and minimize downtime. As a result, businesses can achieve higher levels of reliability and efficiency, reducing operational costs while maximizing productivity.

Another notable technological trend is the development of variable speed drive (VSD) technology in screw compressors. VSD-equipped compressors can dynamically adjust their speed and output to match varying demand levels. This feature optimizes energy consumption by preventing over-compression during low-demand periods, significantly reducing electricity costs and environmental impact. These compressors are particularly

valuable in applications with fluctuating air demand, such as in manufacturing and industrial processes. Furthermore, advancements in materials and design have led to more efficient and durable screw compressor components. Innovations in rotor profiles, coatings, and sealing mechanisms have improved overall performance and reliability. These enhancements contribute to longer equipment lifespan, reduced maintenance requirements, and increased operational uptime.

In addition to these advancements, the integration of remote monitoring and control systems enables operators to manage screw compressors from virtually anywhere, enhancing convenience and accessibility while ensuring optimal performance. In conclusion, technological advancements are revolutionizing the screw compressors market by delivering greater efficiency, reliability, and convenience. As industries increasingly embrace these innovations to meet their compressed air needs, the global screw compressors market is poised for sustained growth. The adoption of smart, connected, and energy-efficient screw compressor systems will continue to be a key driver in enhancing productivity and competitiveness across a wide range of industries.

Key Market Challenges

High Initial Investment Costs

The global screw compressors market faces a significant obstacle in the form of high initial investment costs, which can impede its growth and adoption across various industries. Screw compressors are renowned for their efficiency and reliability in delivering compressed air and gas, making them indispensable for a wide range of applications. However, the substantial upfront expenditure required for their purchase and installation presents a considerable challenge for potential users. One of the primary factors contributing to the high initial investment costs is the complexity of screw compressor technology. These machines are engineered with precision, involving intricate mechanisms, advanced materials, and tight tolerances. As a result, manufacturing screw compressors demands a substantial investment in research, development, and production processes. This inevitably leads to higher price tags for end-users.

Additionally, the installation and setup of screw compressors can be a costly affair. These machines often require specialized infrastructure and auxiliary equipment, such as air dryers, filters, and control systems, to ensure optimal performance and longevity. These supplementary components add to the overall capital expenditure, making it challenging for businesses, especially small and medium-sized enterprises, to justify the

investment. Furthermore, the need for regular maintenance and operational costs can also strain budgets, compounding the financial burden on users. While screw compressors are known for their energy efficiency and durability, ongoing expenses for maintenance, lubricants, and electricity can accumulate over time.

The high initial investment costs can be a deterrent for industries considering the adoption of screw compressors, potentially hindering their ability to optimize their operations and enhance productivity. This challenge is particularly evident in emerging economies where capital resources may be limited. In conclusion, while screw compressors offer undeniable advantages in terms of efficiency and performance, their high initial investment costs present a significant barrier to widespread adoption. To address this issue, manufacturers, governments, and financial institutions should explore avenues for reducing upfront expenses, such as offering financing options, incentives, or subsidies to encourage investment in this critical technology. Such efforts can unlock the full potential of screw compressors and enable industries to reap the benefits of improved energy efficiency and reliability in their operations.

Maintenance and Repairs

Maintenance and repairs play a pivotal role in shaping the dynamics of the global screw compressors market. These critical activities are a double-edged sword, impacting both the market's growth potential and the operational efficiency of various industries that rely on screw compressors for their compressed air and gas needs. On one hand, maintenance and repair services constitute a substantial segment within the screw compressors market. As industrial processes increasingly depend on these machines, the need for regular maintenance and occasional repairs has surged. This has created a lucrative ecosystem for service providers, including original equipment manufacturers (OEMs) and third-party maintenance firms. The demand for scheduled maintenance contracts, spare parts, and emergency repair services has witnessed consistent growth. As a result, these activities have become an indispensable part of the screw compressor market, contributing significantly to its overall revenue.

On the other hand, the frequent requirement for maintenance and repairs can also pose challenges to the growth of the screw compressors market. Downtime during repairs and maintenance can disrupt manufacturing processes, leading to production losses and increased operational costs. Companies often face the dilemma of balancing the cost of regular maintenance against the risk of unscheduled breakdowns. Moreover, the availability of skilled technicians and genuine spare parts can be a bottleneck, particularly in emerging economies.

In conclusion, maintenance and repair services are integral components of the global screw compressors market. While they generate substantial revenue and ensure the longevity of compressors, they also present operational challenges for end-users. As industries continue to rely on screw compressors for their compressed air and gas needs, the balance between proactive maintenance and minimizing downtime will be crucial in shaping the future of this market. Manufacturers and service providers must continually innovate to offer efficient, cost-effective solutions that meet the growing demand for screw compressors while minimizing disruptions caused by maintenance and repairs.

Environmental Concerns

Environmental concerns pose a significant threat to the global screw compressors market, potentially hampering its growth and sustainability. The environmental impact associated with screw compressors primarily revolves around two key areas: refrigerants and energy consumption. Refrigerants: In various air conditioning and refrigeration applications, screw compressors are employed, and many of these systems rely on refrigerants for cooling. The widespread use of certain refrigerants, such as hydrochlorofluorocarbons (HCFCs) and hydrofluorocarbons (HFCs), has raised concerns due to their high global warming potential (GWP). These refrigerants are known as potent greenhouse gases that contribute to climate change when released into the atmosphere. Stricter environmental regulations, such as the Kigali Amendment to the Montreal Protocol and regional regulations like the European Union's F-Gas Regulation, aim to phase down the use of high-GWP refrigerants. This poses challenges for manufacturers and users of screw compressors, as they must transition to low-GWP alternatives or adopt new technologies, which can be costly and complex.

Energy Consumption: While screw compressors are generally known for their energy efficiency compared to other compressor types, they are still substantial consumers of electricity. Energy consumption in industrial processes and manufacturing facilities can account for a significant portion of operational costs and contribute to carbon emissions. Environmental concerns related to carbon footprint and energy efficiency are driving industries to adopt more energy-efficient technologies and practices, which may lead to increased scrutiny of the energy consumption of screw compressor systems.

Furthermore, as global awareness of climate change and sustainability grows, there is a growing demand for environmentally friendly and energy-efficient solutions. End-users and businesses are increasingly prioritizing products and technologies that align with

their sustainability goals, which may lead them to explore alternatives to traditional screw compressors if perceived environmental concerns are not adequately addressed. In conclusion, environmental concerns, particularly related to refrigerants and energy consumption, pose a substantial challenge to the global screw compressors market. Manufacturers and industry stakeholders must proactively address these concerns by transitioning to low-GWP refrigerants, improving energy efficiency, and embracing sustainable practices to ensure the long-term viability of screw compressors in an increasingly environmentally conscious market. Failure to do so could result in a diminished market share and hinder the growth potential of this essential technology.

Key Market Trends

Oil-Free Screw Compressors

Oil-free screw compressors are poised to drive significant growth in the global screw compressors market, driven by a range of factors that cater to the evolving needs of industries worldwide. One of the primary drivers of the oil-free screw compressors market is the increasing demand for compressed air and gas in industries where air quality is paramount. Sectors such as pharmaceuticals, food and beverage, electronics manufacturing, and healthcare require clean, contaminant-free compressed air to ensure product quality and safety. Oil-free screw compressors, which eliminate the risk of oil contamination, are the preferred choice in these applications.

Stringent environmental regulations and sustainability goals also play a pivotal role in the adoption of oil-free screw compressors. These compressors align with green initiatives as they do not release oil aerosols into the atmosphere, reducing the environmental impact and contributing to a cleaner, safer working environment. This makes them ideal for industries looking to minimize their carbon footprint and meet strict emissions standards.

Moreover, the versatility of oil-free screw compressors is driving their market growth. They can handle a wide range of applications, from critical manufacturing processes to medical air supply, and even cleanroom operations. Their adaptability makes them an attractive option for diverse industries seeking reliable and contaminant-free compressed air solutions.

The ongoing technological advancements in oil-free screw compressor design are also bolstering their market presence. Manufacturers are continually improving the efficiency, reliability, and performance of these compressors, making them more attractive to end-

users. Additionally, advancements in materials and manufacturing processes are contributing to the development of smaller, more compact oil-free screw compressors, which can save space and reduce installation costs. In conclusion, oil-free screw compressors are becoming a driving force in the global screw compressors market due to their ability to meet the growing demand for clean and contaminant-free compressed air and gas. Their compatibility with stringent environmental regulations, versatility across various industries, and ongoing technological innovations position them as a key solution for industries that prioritize air quality, sustainability, and operational efficiency. As these trends continue to gain prominence, the market for oil-free screw compressors is expected to expand further in the coming years.

Digitalization and IoT Integration

Digitalization and Internet of Things (IoT) integration are poised to be powerful drivers of growth in the global screw compressors market. These technological advancements are revolutionizing the way screw compressors are operated, monitored, and maintained, offering numerous benefits to both manufacturers and end-users. One of the key impacts of digitalization and IoT integration is enhanced operational efficiency. With advanced sensors and monitoring systems, screw compressors can collect real-time data on their performance, including temperature, pressure, and energy consumption. This data can be transmitted to a centralized control system or the cloud for analysis. Manufacturers and operators can then use this information to optimize compressor settings, identify inefficiencies, and make informed decisions to reduce energy consumption and operating costs.

Predictive maintenance is another critical aspect of IoT integration in screw compressors. By continuously monitoring the condition of key components and analyzing data for signs of wear or potential failures, predictive maintenance systems can forecast when maintenance or repairs are needed. This proactive approach minimizes unplanned downtime, reduces maintenance costs, and extends the lifespan of screw compressors.

Remote monitoring and control capabilities are also transforming the way screw compressors are managed. IoT-enabled screw compressors can be accessed and controlled remotely through web-based interfaces or mobile apps. This allows operators to monitor multiple compressors from a single location, make adjustments in real-time, and respond swiftly to any issues that arise, even if they are located far from the compressor units. It greatly improves operational flexibility and responsiveness.

Furthermore, digitalization and IoT integration offer valuable insights into long-term trends and patterns in compressor performance. This data can help manufacturers refine their product designs, identify opportunities for efficiency improvements, and develop more reliable and durable screw compressors. The global screw compressors market is increasingly driven by the demand for smarter, more efficient, and reliable compressed air solutions. Digitalization and IoT integration are enabling manufacturers to meet these demands by providing cutting-edge technologies that not only optimize performance but also reduce operating costs and environmental impact. As industries continue to prioritize energy efficiency and sustainability, screw compressors equipped with these advanced capabilities are expected to see continued growth and adoption in various applications, solidifying their position as a vital component in industrial processes worldwide.

Segmental Insights

Stage Insights

Single-Stage Screw Compressors segment is expected to dominate the market during the forecast period. Single-stage screw compressors use a single stage to compress the gas, between the inlet valve and the tool nozzle. First, the air is sucked in, the gas is compressed one time using the rotors and then compressed gas or air is moved onward to a storage tank.

They are primarily oil-injected screw compressors, delivering a pressure of around 100–125 pounds per square inch gauge (psig) in a single stage of compression, while there is also a small share of the single-stage oil-free screw compressor, but they are mainly used for achieving compressions of small amounts of gas or air and in lower ratios. The market for single-stage screw compressor has seen a steady increase in recent years, mainly supported by the rise of industrial activities, especially the micro, medium, and small enterprises (MSME). Some examples of single-stage screw compressors are Hitachi's DSP NEXT2 Series and Ingersoll Rand's SS Series, among others. Although the impact of the COVID-19 outbreak has been very significant of the majority of the MSMEs in the manufacturing sector, due to reduced activities caused by lockdown and social distancing measures and decrease in local and global demand due to economic slowdown.

The impact of COVID-19 outbreak on the single-stage screw compressor is expected to be long-lasting, and it is expected to revive once the industrial activities are at pre-COVID-19 levels. This scenario is expected to arrive toward the end of the forecast

period, by which time the easy availability of a vaccine or kick-in of herd immunity is expected.

Regional Insights

The Asia Pacific region is expected to dominate the market during the forecast period. Asia-Pacific is expected to dominate the screw compressors market and to grow at fastest rate over the forecast period.

During 2018, the steel production in Asia-Pacific region increased drastically reaching highest in the decade. China is the biggest producer and consumer of the steel, globally.

China has been planning to increase the quantity of nitrogen for use in oil recovery activities, which is expected to increase the demand for industrial gases. Similarly, the growth of the solar industry has supplemented the demand for argon in the country and the growth in other industrial activities has supplemented the demand for high-purity industrial gases, such as nitrogen, argon, and oxygen, which, in turn, is expected to increase demand for air separation units with compressor units, suited for handling dry and combustible gases, and are leak-proof, such as screw compressor.

Recent Developments

In September 2019, Atlas Copco announced the launch of its new XAS 950 air compressor. XAS 950 is a single-stage, oil-injected, rotary air compressor which has the capability of adjusting pressure through cognitive electronics to match the engine speed, power, and torque with air demand. This would result in fuel savings and better efficiency.

In June 2019, ELGi equipment's which is one of the leading air compressor manufacturers launched the upgraded scale of encapsulated screw air compressors with variable frequency drives and heat recovery systems.

In March 2019, Atlas Copco announced the launch of its latest GA 110-160 VSD oil-injected air compressor range in a smart air solution portfolio. The newly launched range features a new state of art compression element and is designed to provide triple benefits in terms of efficiency, energy encompassment, service, and uptime.

Key Market Players

Aerzener Maschinenfabrik GmbH

Atlas Copco AB

Bauer Comp Holding GmbH

Daikin Industries, Ltd.

Emerson Electric Co.

Hitachi Industrial Equipment Systems

Ingersoll-Rand PLC

Mitsubishi Electric Corporation

Kobe Steel Ltd

Report Scope:

In this report, the Global Screw Compressors Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Screw Compressors Market, By Technology:

Oil-injected Screw Compressor

Oil-free Screw Compressor

Global Screw Compressors Market, By Stage:

Single-Stage Screw Compressors

Multi-Stage Screw Compressors

Global Screw Compressors Market, By End-User Industry:

Manufacturing Industry

Oil and Gas Industry

Mining Industry

Construction Industry

Other

Global Screw Compressors Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Screw Compressors Market.

Available Customizations:

Global Screw Compressors Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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13.3. Bauer Comp Holding GmbH

13.3.1. Business Overview

13.3.2. Key Revenue and Financials

13.3.3. Recent Developments

13.3.4. Key Personnel

13.3.5. Key Product/Services

13.4. Daikin Industries, Ltd.

13.4.1. Business Overview

13.4.2. Key Revenue and Financials

13.4.3. Recent Developments

13.4.4. Key Personnel

13.4.5. Key Product/Services

13.5. Emerson Electric Co.

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14. STRATEGIC RECOMMENDATIONS

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