

South & Central America Oxy-fuel Combustion Technology Market Size and Forecast (2021 - 2031)

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Abstracts

The South America Oxy-fuel Combustion Technology Market is projected to grow significantly, with an expected market size of US\$ 37.7 million by 2031, up from US\$ 23.0 million in 2024. This growth represents a compound annual growth rate (CAGR) of 7.5% from 2025 to 2031.

Executive Summary and Market Analysis

The oxy-fuel combustion technology market in South and Central America is primarily divided into three segments: Brazil, Argentina, and the Rest of South and Central America. Despite facing challenges in boosting renewable energy production and utilization, the region is witnessing a rise in carbon capture and storage (CCS) technologies, which are being integrated with fossil fuel usage as well as wind and solar energy initiatives. Oxy-fuel combustion technology plays a crucial role in capturing carbon dioxide (CO₂) emissions produced by large industrial facilities. This technology compresses CO₂ for transportation and ultimately injects it into deep geological formations, such as saline aquifers, unmineable coal seams, or depleted oil fields, thereby preventing its release into the atmosphere. Additionally, the oil industry employs this technology for enhanced oil recovery (EOR), where CO₂ is sequestered and injected into aging wells to boost oil or gas extraction.

Strategic Insights

Market Segmentation Analysis

The South America Oxy-fuel Combustion Technology Market is segmented based on offerings and industry applications. In terms of offerings, the market is divided into

Solutions and Services, with the Solutions segment leading the market in 2024. When categorized by industry, the market includes Oil and Gas, Power Generation, Manufacturing, Metals and Mining, and Others, with the Power Generation sector also dominating in 2024.

Market Outlook

The increasing awareness of air pollution in both developed and developing nations has intensified efforts to combat climate change, primarily driven by rising greenhouse gas emissions. Organizations such as the World Health Organization (WHO), the US Environmental Protection Agency (EPA), and the World Economic Forum are actively promoting awareness programs aimed at reducing air pollution. Various non-profit organizations, including the Climate and Clean Air Coalition (CCAC), the Union of Concerned Scientists, and Earthjustice, are also working to educate industries about the detrimental effects of harmful emissions on the environment. Notable initiatives include the BreatheLife campaign, which encourages action against air pollution to safeguard human health and the planet, and the International Day of Clean Air for blue skies, designated by the United Nations General Assembly to raise awareness about air pollutants.

These initiatives are driving end-user industries to adopt technologies that minimize hazardous gas emissions, which is expected to significantly enhance the growth of the oxy-fuel combustion technology market in the upcoming years.

Country Insights

The South America Oxy-fuel Combustion Technology Market is further analyzed by country, focusing on Brazil, Argentina, and the Rest of South America. Brazil is anticipated to hold the largest market share in 2024.

Brazil's energy landscape is unique, with hydropower accounting for over 70%-80% of its energy generation, supplemented by fossil fuels, biomass, and nuclear power. Consequently, Brazil's electricity-related emissions are relatively low. However, addressing deforestation in the Amazon is critical for reducing pollution levels in the country. Despite plans to install 6,000 MW of coal power by 2030, which will increase coal's contribution to CO₂ emissions, it is projected that coal will only represent 2.7% of the energy grid, while renewables will dominate at 83%. In Brazil, the application of CCS technology is expected to be more beneficial for industrial development rather than for power generation.

Company Profiles

Key players in the South America Oxy-fuel Combustion Technology Market include prominent companies such as Air Liquide, Encon Thermal Engineers Pvt Ltd, Falorni Gianfranco SRL, Jupiter Oxygen Corp, Linde Plc, Heidelberg Materials AG, ESA SpA, Messer SE & Co KGaA, Babcock & Wilcox Enterprises Inc, and Air Products and Chemicals Inc. These companies are pursuing various strategies, including market expansion, product innovation, and mergers and acquisitions, to deliver cutting-edge products to their customers and enhance their market presence.

In conclusion, the South America Oxy-fuel Combustion Technology Market is poised for substantial growth, driven by increasing environmental awareness, technological advancements in carbon capture, and the need for industries to adopt cleaner technologies. As the region continues to navigate its energy landscape, oxy-fuel combustion technology will play a pivotal role in reducing emissions and promoting sustainable industrial practices.

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