
Description: The market for global Heat Recovery Steam Generator (HRSG) is expected to be USD XX billion at the end of the year 2015 and by the end of 2020 it is estimated to reach USDXX billion. The market is expected to grow at a rate of 8%. Traditionally Rankin cycle is the method followed to convert thermal energy into mechanical power. This is later used to generate power or used for other manufacturing process. Once this is done the heat is allowed to escape or cooled down and then released into the atmosphere. In thermal power plants elaborate procedure is followed to cool the escaping heat. However this heat can be utilized through heat recovery system. The heat can be captured from the exhaust of combustion turbines or hot gas streams through a heat exchanger. This heat is later utilized for power generation or cogeneration process. This process is more efficient than the traditional systems because of efficiency in resource utilization and reducing pollution in the environment.

The benefits of HRSG has attracted the attention from multiple sectors. Industries, government agencies and environmental groups have come together to support the application of this technology in factories. The primary benefits of HRSG is the reduction in harmful gases that otherwise would have been created in the process. It also results in savings in cost because of the reduction in the need to generate heat. The primary use of heat recovery steam generator is in Combined Cycle Power Plants where the heat generated from one process is used in other processes. The use of HRSG systems is also made in desalination plants where heat is used for power generation as well as desalination process. Also in heat produced from thermal plants is captured by HRSG and used to for district heating purpose.

The drivers for Heat Recovery Steam Generator are the demand for cleaner energy systems and support from the government for green energy projects. Various governments including US department of energy supports installation of HRSG systems in plants. Chinese government is actively promoting plans to improve the quality of power infrastructure. Thereby power companies are instructed to go for installation of HRSG systems. Also banks have been directed to support the installation of HRSG systems in factories. Thus two largest power consumers of the world US and China are expected to lead the global heat recovery system market. European Union has also made guidelines to be followed in the countries of the region for cleaner energy. International bodies like international energy agency has supported research project and technical assistance for HRSG and other clean energy initiatives for companies around the world. Due to the benefits towards the clean energy HRSG systems are favoured by environmental support groups around the world for benefits in reducing pollution. However there is a restraint in form of low cost substitutes. Several Chinese producers have flooded the market with low cost substitutes which harming the established players. Even though there is high maintenance cost and poor quality issues are associated with this but because of the low cost factor, these are favoured by cost conscious power companies.

HRSG system consists of several components like economizer, evaporator, super heater, and water preheater. Economizers acts as a heat exchanger that is used to heat the water to a controlled level. Evaporator is used to evaporate the liquid into gas. In terms of type HRSGs can be divided into several categories. If heat is used then it can be a fired HRSG system otherwise an unfired HRSG system. If the gas flow is vertical and coils are placed horizontally then it is a vertical system. If the gas flow is horizontal and coil is vertically arranged, it is named as horizontal HRSG system. Based on the use of sources of pressure HRSG systems can be called as single or multiple pressure system.

Middle East market offers significant opportunity for HRSG systems. For oil or gas fired power generation systems installed in this region can be utilized for desalination process. Considering the increasing demand for desalination plants and population demand HRSG systems offer an efficient system for reducing energy foot print and savings in cost. Similarly Indian power sector has received a fresh impetus from the government is on the verge for massive capacity addition. For energy efficiency and pollution reduction HRSG systems can be utilized in these upcoming plants. However there are challenges to this product in terms of complex manufacturing process that is required to be followed for this product. More complexity adds to the cost and hence acts as a restraint. Also due to over capacity European market for waste to energy has reached a plateau. So there is limited scope of HRSG systems in this segment. But in other segments there is ample opportunities for growth of this product.
Key Deliverables in the Study

1. Market analysis for the global Heat Recovery Steam Generator market, with region specific assessments and competition analysis on global and regional scales

2. Market definition along with the identification of key drivers and restraints

3. Identification of factors instrumental in changing the market scenarios, rising prospective opportunities, and identification of key companies that can influence this market on a global and regional scale

4. Extensively researched competitive landscape section with profiles of major companies along with their market shares

5. Identification and analysis of the macro and micro factors that affect the global Heat Recovery Steam Generator market on both global and regional scales

6. A comprehensive list of key market players along with the analysis of their current strategic interests and key financial information

7. A wide-ranging knowledge and insights about the major players in this industry and the key strategies adopted by them to sustain and grow in the studied market

8. Insights on the major countries/regions in which this industry is blooming and to also identify the regions that are still untapped

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