

Exhaust Heat Recovery System Market Forecasted to Achieve US \$27.88 Billion by 2029

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How Big Is The Exhaust Heat Recovery System Market In 2025?

The market for exhaust heat recovery systems has seen robust growth in the recent past.

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Expected to grow to \$27.88 billion in 2029 at a compound annual growth rate (CAGR) of 7.6%”

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Expansion is projected to continue from \$19.38 billion in 2024 to \$20.79 billion in 2025, equating to a compound annual growth rate (CAGR) of 7.3%. The historical growth can be attributed to factors such as escalating requirements for fuel efficiency in automotive and industrial areas, rising consciousness about energy conservation in manufacturing industries, stricter government regulations concerning industrial emissions, increasing demand for combined heat and power (CHP)

systems, and a growing trend towards adopting sustainable practices within the transportation sector.

In the coming years, the market size of the exhaust heat recovery system is set to experience robust growth. The market is anticipated to surge to \$27.88 billion by 2029, with a compound annual growth rate (CAGR) of 7.6%. This projected growth during the forecast period can be credited to the growing demand for electric and hybrid vehicles, increased industrial automation, higher government incentives, and subsidies, expanding corporate sustainability efforts, and heightened awareness about reducing lifecycle costs. Key trends expected during this forecast period consist of the development of intelligent control systems, emergence of low-cost

production methods, integration into waste heat recovery network, advancements in nanofluids and phase-change materials, and leaps in software algorithms.

Download a free sample of the exhaust heat recovery system market report:

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What Are The Key Driving Factors For The Growth Of The Exhaust Heat Recovery System Market?

The increasingly stringent emission regulations are predicted to stimulate the growth of the exhaust heat recovery system market. These regulations are legally binding rules created by government and regulatory bodies to restrict and mitigate the emission of harmful pollutants and greenhouse gases originating from industrial activities, transportation systems, and other sources. These restrictions aim at preserving public health and the environment. The shift towards stricter emission regulations is primarily motivated by the focus on environmental sustainability, as the consciousness about the enduring environmental and societal effects of pollution pushes regulators to introduce measures promoting cleaner technologies. Exhaust heat recovery systems support these rigorous standards by recovering and reutilizing the heat wasted in exhaust processes, thereby enhancing energy efficiency, cutting down fuel usage, and minimizing harmful emissions. For example, in March 2024, the U.S. Environmental Protection Agency (EPA) established national pollution standards for passenger cars, light-duty trucks, and medium-duty vehicles ranging from model years 2027 to 2032 and beyond. These standards are expected to avoid more than 7 billion tons of carbon emissions and generate nearly \$100 billion in annual net societal benefits. This includes \$13 billion from enhancements in public health due to cleaner air and \$62 billion from lessened fuel, maintenance, and repair costs for drivers. Hence, intensifying emission regulations are contributing to the growth of the exhaust heat recovery system market.

Who Are The Key Players In The Exhaust Heat Recovery System Industry?

Major players in the Exhaust Heat Recovery System Global Market Report 2025 include:

- MAHLE GmbH
- Denso Corporation
- Forvia Faurecia SE
- Continental AG
- Robert Bosch GmbH
- Mitsubishi Heavy Industries, Ltd.
- Valeo SE
- Tenneco Inc.
- Eberspächer Gruppe GmbH & Co. KG
- Schaeffler AG

What Are The Key Trends And Market Opportunities In The Exhaust Heat Recovery System Sector?

Leading corporations partaking in the exhaust heat recovery system market are capitalizing on government schemes such as the electric program investment charge (EPIC) to promote the adoption of renewable energy and infrastructure growth. Funded by the government, the EPIC supports the research, innovation, and demonstration of creative clean energy technologies to expedite sustainable energy solutions and encourage low-carbon progress. For example, the California Energy Commission (CEC), a state government agency from the US, introduced a low-temperature waste heat recovery system at Searles Valley Minerals in Trona, California in January 2025. This initiative not only captured emitted low-pressure steam to dry V-BOR and diminish the use of natural gas but also preserved water by recycling cold condensate via a storage tank, thereby meeting essential water-resource requirements. The system achieved a 15% cutback in natural gas consumption.

What Segments Are Covered In The Exhaust Heat Recovery System Market Report?

The exhaust heat recovery system market covered in this report is segmented –

- 1) By Type: Heat Recovery Steam Generators, Heat Exchangers, Steam Turbines, Condensing Units, Chillers
- 2) By Component: Turbine, Thermoelectric Generator (TEG) Module, Compressor, Evaporator, Exhaust Gas Recirculation (EGR) Valve And Cooler, Condenser, Other Components
- 3) By Vehicle Type: Passenger Car, Light Commercial Vehicle (LCV), Heavy Commercial Vehicle (HCV)
- 4) By Application: Industrial, Commercial, Residential, Power Generation, Automotive
- 5) By End-User: Manufacturing, Oil And Gas, Food And Beverage, Utility, Transportation

Subsegments:

- 1) By Heat Recovery Steam Generators: Waste Heat Boilers, Once-Through Steam Generators, Firetube Steam Generators, Watertube Steam Generators
- 2) By Heat Exchangers: Shell And Tube Heat Exchangers, Plate Heat Exchangers, Air Cooled Heat Exchangers, Finned Tube Heat Exchangers
- 3) By Steam Turbines: Back Pressure Steam Turbines, Condensing Steam Turbines, Extraction Steam Turbines, Reheat Steam Turbines
- 4) By Condensing Units: Air Cooled Condensers, Water Cooled Condensers, Evaporative Condensers, Hybrid Condensers
- 5) By Chillers: Air Cooled Chillers, Water Cooled Chillers, Absorption Chillers, Magnetic Chillers

View the full exhaust heat recovery system market report:

<https://www.thebusinessresearchcompany.com/report/exhaust-heat-recovery-system-global-market-report>

Which Region Is Expected To Lead The Exhaust Heat Recovery System Market By 2025?

In 2024, North America led the global market for exhaust heat recovery systems. It is anticipated that the Asia-Pacific region will experience the most rapid growth in the coming years. The Exhaust Heat Recovery System Global Market Report 2025 reviews several regions including Asia-

Pacific, Western Europe, Eastern Europe, North America, South America, Middle East, and Africa.

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