

## Air Pollution Control Market

In 1992, the world air pollution market grew at over 15% with more than \$12 billion in systems placed for particulate and gaseous contaminant removal. Approximately 50% of all flue gas desulfurization systems purchased worldwide were purchased in North America, \$3 billion worldwide. World fabric filter system orders, electrostatic precipitators and scrubbers/adsorbers and thermal/catalytic fume incinerators all reached approximately \$2 billion worldwide. Other air pollution control devices including cyclones will be ordered at a rate of approximately \$600 million worldwide.

The estimated 1996 share of the total \$21 billion air pollution control market includes fabric filters (18%), ESPs (16%), Scrubbers (23%), Oxidation (25%), NOX (8%), and Carbon Adsorption (11%).

In total, the U.S. market for air pollution control equipment is forecast to grow 68% in sales to \$1.0 billion in 1996 as follows:

Flue gas desulfurization systems	\$181 million
Fabric filters	290 million
Oxidation systems	233 million
Scrubber sales	75 million
Carbon adsorbers	56 million
Electrostatic precipitators	100 million

Implementing the Clean Air Act and its amendments is expected to increase air pollution abatement equipment and services spending to \$40 billion in 1993 and to \$67 billion in 2000. U.S. sales of industrial air pollution control equipment will increase 11% annually to over \$1.0 billion dollars in 1995.

The EPA has proposed new landfill regulations for handling 100,000 metric tons or more of solid waste and which emit 150 metric tons or more of non-methane organic compounds (NMOCs) annually. Approximately 620 existing landfills and 90 projected new landfills are affected, and the new rule is expected to cost \$240 million per year for the existing landfills and \$26 million per year for new landfills. The cost of air pollution control for 30 planned municipal incinerators is estimated at \$170 million per year by 1994, or a cost increase of about \$11 per ton of waste combusted. National costs associated with controlling the 100 existing municipal incinerator facilities are estimated at \$302 million per year, or about \$10 per ton of waste combusted.

The 1996 market for indoor air quality (IAQ) consulting and analytical services, radon detection products and indoor environmental monitors is forecast to be \$2.5 billion.

U.S. utilities have already signed purchase orders for \$2 billion worth of flue gas desulfurization FGD systems and will commit another \$6 billion over the next five years. 20,000 megawatts of scrubbers will be constructed for 1995 and 40,000 megawatts of retrofit scrubber systems will be ordered by 1997. Toxic air pollution issues will favor scrubbing instead of fuel switching in Phase II. Plants that fuel switch in Phase II will have to upgrade particulate removal systems. Utilities waiting until 1997 to order FGD systems will not be able to meet the 2000 Phase II deadline for compliance with the Clean Air Act.