

Global Pressurised Deaerators Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Pressurised Deaerators competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Pressurized deaerators can achieve deoxygenation rates far exceeding those of atmospheric pressure equipment under a stable pressure of 0.2-0.3 MPa, fundamentally solving the most critical corrosion problem in industrial steam and hot water systems: boiler heating surfaces, steam pipe networks, heat exchangers, and condensate recovery systems suffer from pitting corrosion, stress corrosion cracking, and heat transfer attenuation due to dissolved oxygen and free CO₂. This leads to long-term risks for enterprises, including increased energy consumption, more frequent maintenance, shortened boiler lifespan, premature scrapping of heat exchangers, and unplanned downtime. In scenarios with extremely high requirements for continuity and water quality, such as food processing, pharmaceuticals, district heating stations, and hospital energy centers, this corrosion problem often directly translates into production interruptions, product quality fluctuations, and uncontrolled energy costs. Therefore, the core reason for the market's choice of pressurized deaerators is their ability to achieve a 20-40% increase in deoxygenation efficiency, lower steam consumption, significantly reduced system corrosion, and a 2-3 times extension of boiler and pipeline lifespan through higher temperatures, more efficient steam-water contact, and more stable thermal balance. This enables energy stations to achieve higher reliability, lower total life-cycle costs, and more controllable operational risks, making them an irreplaceable core water supply equipment in the current trend towards large-scale, continuous, and clean energy systems. In 2024, the global installed capacity of new pressurized deaerators was approximately 42,000-55,000 units, with a unit price of USD 13,600 and a gross profit margin of approximately 18%-29%. A pressurized deaerator is a core

boiler water treatment device that operates under controlled pressure (typically 0.2-0.6 MPa) and reduces dissolved oxygen (DO) and free CO₂ in feedwater to 0.02-0.03 mg/L through steam heating and a two-stage spray-tray structure. The main body consists of spray heads, a water distribution tray, a pressure vessel cylinder, a steam distributor, a condensate vent valve, a pressurized section safety valve, level and pressure gauges, a collection tank, and a makeup water control system. Typical parameters include: deaerated water temperature 104-160 °C (matching the operating pressure), operating pressure 0.2-0.6 MPa, steam consumption per ton of water 2.8-4.2%, influent DO 2-6 mg/L, effluent DO <0.02 mg/L, and materials primarily composed of corrosion-resistant steels such as SA-516 Gr.70 and SS304/316L; welds are subjected to RT/UT inspection. In a typical 10-35 t/h boiler room, it is usually equipped with one set of pressurized deaerator; in a regional energy station, 2-3 sets can be configured to operate in parallel to meet the peak load water replenishment demand.

Supply Situation Upstream components include boiler vessel steel plates (Q345R/SA-516 Gr.70), stainless steel nozzle/tray materials, steam control valves and pressure reducing valve assemblies, temperature and pressure sensors and electrical control systems, water collection tanks and support structures. Raw material costs account for 52%-63% of the total unit cost. Key suppliers include: Voestalpine, Sandvik, Emerson, KITZ, and Honeywell.

Manufacturer Characteristics Spirax Sarco has a high penetration rate in large-scale boiler rooms and food factory energy system projects in Europe; EUROWATER has an advantage in industrial water treatment + deaeration packaging stations; Tomlinson has a leading position in bidding for medium to high tonnage boilers in Australia and Southeast Asia.

Example In 2024, Spirax Sarco delivered two 45 t/h pressurized deaerator systems (0.35 MPa class) for a district heating company's boiler room renovation project in Denmark. The systems included a spray + tray composite deaerator tower, steam heaters, PLC level/pressure interlocking, and a 12,000 L collection tank, designed to upgrade two 30 t/h natural gas steam boilers.

Applications Primarily used in district heating station boiler rooms, hospital/food factory steam boiler systems, chemical fiber and textile pretreatment steam stations, papermaking steam systems, pharmaceutical and laboratory steam equipment, commercial complex energy centers, industrial process steam (cleaning, sterilization, heat exchange), centralized steam supply stations, and complete replacement projects for old boiler rooms. Typical clients include ENGIE, Veolia, Nestlé, Sodexo Energy, and Johnson Controls.

Technological Trends Technological evolution focuses on three aspects: First, upgrading to high-efficiency deoxygenation structures, with spray-tray composite towers evolving towards multi-stage steam scavenging + micro-orifice injection structures, reducing DO to <0.01 mg/L; second, intelligent monitoring, with liquid level, pressure, makeup water temperature, and steam flow all integrated into the boiler room BMS/SCADA system, enabling adaptive steam consumption adjustment,

exhaust volume optimization, and energy consumption prediction; third, material and corrosion protection upgrades, transitioning from carbon steel with epoxy lining to all-stainless steel 316L and duplex steel to extend service life to 25-30 years; accompanying technologies include low-steam-consumption ejectors, negative pressure scavenging valves, low-noise exhaust condensers, and modular skid designs. The overall trend points to a product system with lower DO, lower steam consumption, intelligent operation and maintenance, high corrosion resistance, and modular integration.

Market Influencing Factors Multiple factors drive the market, including the global upgrade of boiler systems towards higher efficiency, longer lifespan, and lower corrosion; the replacement cycle of boiler rooms in Europe and North America coinciding with decarbonization policies for steam systems promoting the transformation of deaeration processes; increased demand for high-quality steam (low oxygen content) from food processing, chemical fiber, and pharmaceutical industries; an increase in the number of large and medium-sized steam boiler projects in regional heating networks and commercial building energy centers; and frequent pipe corrosion and burst accidents caused by substandard DO levels in aging deaerators, prompting the replacement of existing equipment. Furthermore, fluctuations in the prices of boiler steel plates and stainless steel materials directly affect manufacturing costs, while energy service companies such as ENGIE and Veolia use centralized bidding methods, enabling mainstream brands to secure large-scale orders. Overall, the market structure exhibits continuous growth + an increase in medium and large-sized projects + increased penetration of high corrosion-resistant materials + enhanced intelligent monitoring + modular and integrated solutions.

The global Pressurised Deaerators market size was estimated at USD 632.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Pressurised Deaerators market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Pressurised Deaerators market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Pressurised Deaerators market.

Global Pressurised Deaerators Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

MINGAZZINI

Spirax Sarco

EUROWATER

Tomlinson

Industrial Steam

Lockwood

Sellers

Cleaver-Brooks

Babcock Wanson

VALSTEAM

Cochran

Atlantic Feedwater Systems

PC McKenzie

Shipco

Market Segmentation (by Type)

Spray Style

Tray Style

Market Segmentation (by Application)

District Heating Stations

Hospital Energy Centers

Industrial

Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Pressurised Deaerators Market

Overview of the regional outlook of the Pressurised Deaerators Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Pressurised Deaerators Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Pressurised Deaerators, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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