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Global Marine Plate-Type Fresh Water Generator Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G97F4D6EB942EN.html
Date: September 2026
Pages: 113
Price: US$ 4,480.00 (Single User License)
ID: G97F4D6EB942EN

Abstracts

The global Marine Plate-Type Fresh Water Generator market size is expected to reach $ 213 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Marine Plate-Type Fresh Water Generators are onboard thermal desalination systems that convert seawater into fresh water through vacuum evaporation and condensation using plate-type heat-transfer structures. The systems typically recover heat from main-engine jacket cooling water, while steam or multiple heat-source configurations may also be used. Titanium plate packs are widely employed for the evaporator and condenser because of their corrosion resistance and compact heat-transfer performance. Commercial configurations include single-stage, two-stage and multi-stage or multi-effect systems, with mainstream capacities spanning approximately 1–100 m³/day depending on vessel size and freshwater demand. Current designs increasingly integrate evaporation, separation and condensation functions within compact plate-pack architectures and use salinity monitoring, ejectors, pumps and automatic controls to maintain stable freshwater quality. This study focuses on complete plate-type freshwater generation equipment supplied for merchant vessels, tankers, passenger ships, offshore and support vessels, naval vessels and other marine applications, with demand divided between newbuild installation and replacement or retrofit projects.

Key Findings

The global weighted average selling price of Marine Plate-Type Fresh Water Generators was approximately US$46,000–50,000 per unit in 2025.

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Single-stage plate-type fresh water generators remained the largest product type.

Merchant cargo vessels represented the largest downstream application segment.

Asia-Pacific was the largest region for newbuild installation demand and production.

Two-stage plate-type systems are gradually moving into a higher-value price segment.

Market Trends

The clearest technology trend is the transition from conventional single-stage units toward more energy-efficient and more integrated plate-type systems. Advanced two-stage designs can generate the same freshwater output with roughly half the waste heat required by comparable single-stage arrangements and can reduce electrical consumption substantially; current commercial products extend this architecture to capacities of 20–100 m^3/day. At the same time, integrated plate-pack concepts are reducing equipment footprint and combining evaporation, separation and condensation functions within a compact thermal module. The use of titanium heat-transfer surfaces, non-glued or service-friendly gasket structures, automated salinity control and simplified onboard maintenance is becoming increasingly important. These developments are particularly relevant under slow-steaming operating conditions, where less engine waste heat may be available for freshwater generation.

Market Dynamics

The market is characterized by a mature installed base, recurring replacement demand and a close linkage with global newbuilding activity. The International Chamber of Shipping indicates that more than 50,000 merchant ships trade internationally, creating a large long-term installed base for onboard freshwater equipment. Replacement demand is structurally important because freshwater generators operate for long periods in corrosive seawater environments and require periodic plate-pack refurbishment, component replacement and, eventually, complete system renewal.

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Newbuild demand is more cyclical and follows shipyard orderbooks, while retrofit demand is influenced by vessel age, changes in operating profiles and the economics of upgrading older single-stage equipment to more energy-efficient systems.

Drivers

The principal drivers are fleet renewal, expansion of the global merchant fleet, strong Asian shipbuilding output and the need to reduce onboard freshwater bunkering. Thermal freshwater generators can use otherwise wasted engine jacket-water heat, limiting incremental fuel or electrical consumption when suitable heat is available. Energy-efficiency regulation also supports more efficient equipment design. IMO requirements for EEXI and CII have increased the focus on vessel-wide energy efficiency since 2023, encouraging owners and designers to optimize auxiliary-system energy consumption. For plate-type freshwater generators, this favors systems with lower seawater pumping demand, lower electrical consumption and the ability to maintain freshwater production when vessels operate at reduced engine loads.

Restraints

The main restraint is competition from marine reverse-osmosis watermakers. RO systems are particularly competitive on vessels where sufficient low-grade engine waste heat is unavailable, where operating profiles are highly variable, or where compact electrical water production is preferred. The competitive boundary is therefore increasingly determined by vessel type, engine configuration, heat availability and lifecycle operating economics rather than water-production capacity alone. Thermal plate-type systems also require control of scaling, corrosion, vacuum integrity and plate-gasket condition, creating maintenance requirements that can influence technology selection. Smaller vessels historically had greater reliance on bunkered freshwater or RO, although compact thermal systems are broadening the addressable range.

Opportunities

The most attractive opportunity is energy-efficient replacement and retrofit of the installed base. Two-stage units can be particularly valuable for vessels adopting slow steaming or operating with less available jacket-water heat, because higher thermal utilization allows freshwater production to be maintained at lower engine loads. Another opportunity lies in compact low-capacity products for smaller commercial and support

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vessels; current plate-type platforms can reach capacities as low as 1–15 m³/day. High-capacity two-stage systems, offshore applications and naval vessels also form higher-value niches where reliability, low salinity, redundancy and lifecycle support can outweigh initial equipment price.

Challenges

The principal challenge is balancing high thermal efficiency with lifecycle reliability in harsh marine operating conditions. Plate surfaces continuously exposed to seawater must tolerate corrosion and scaling, while vacuum performance, ejector efficiency, gasket integrity and salinity control directly affect output quality. Increasing system integration reduces footprint and energy consumption but can raise requirements for engineering capability, plate design and service expertise. A further challenge is the fragmented replacement cycle: many shipowners replace plate packs or auxiliary components rather than complete units, which limits new-equipment demand in some years. Technology competition with RO also means manufacturers must demonstrate total lifecycle advantages rather than relying solely on the availability of waste heat.

Industry Chain Analysis

The upstream supply chain comprises titanium plate materials and fabricated heat-transfer plates, gaskets and sealing materials, stainless-steel or corrosion-resistant housings, ejectors, seawater and freshwater pumps, valves, salinity sensors, instrumentation and control components. Titanium plate bundles are a central component in mainstream designs because the evaporator and condenser are directly exposed to seawater; current European and North American commercial systems explicitly use titanium plate structures. Midstream manufacturers integrate thermal design, vacuum evaporation, heat recovery, separation, condensation, water-quality monitoring and automation into complete freshwater generators. Downstream customers include shipyards, shipowners, naval procurement organizations, offshore operators and marine MRO providers.

Value Chain Analysis

Value creation is concentrated in plate thermal design, vacuum-system engineering, corrosion-resistant material selection, compact system integration, marine certification and lifecycle service rather than in basic fabrication alone. Installed-base scale is

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especially important because plate packs, gaskets and auxiliary components generate long-term service requirements and strengthen supplier relationships with fleets. One established Japanese manufacturer reports cumulative Fresh Water Generator deliveries exceeding 17,000 units, illustrating the significance of installed-base economics in this market. For shipowners, equipment value increasingly depends on total lifecycle cost, including electrical demand, waste-heat utilization, maintenance frequency, freshwater quality and worldwide service availability.

Segment Insights

By evaporation stage, single-stage plate-type systems remain the largest segment, while two-stage systems are gaining importance in higher-efficiency and higher-value installations. By heating source, jacket-water-heated equipment remains the conventional mainstream, with steam and dual or multiple heat-source configurations serving vessels with different onboard energy systems. By capacity, the market spans small units of 10 m^3/day or less, mainstream units above 10–30 m^3/day and >30–60 m^3/day, and high-capacity systems above 60 m^3/day. Commercial products demonstrate a broad technical range from approximately 1 m^3/day to 100 m^3/day. By installation type, newbuild installations provide the primary cyclical growth exposure, while replacement and retrofit demand creates a more stable recurring base.

Downstream Market Opportunities

Merchant cargo vessels provide the largest volume opportunity because of their global installed base and continued newbuilding requirements. Tankers remain an important independent segment because long voyages and continuous onboard operations favor reliable freshwater self-sufficiency. Passenger ships and ferries require higher freshwater availability and therefore support larger-capacity and higher-redundancy configurations. Offshore and support vessels are attractive for suppliers capable of providing ruggedized systems and strong lifecycle support, while naval and government vessels form a specialized higher-specification market where water quality, reliability and qualification requirements can create higher barriers to entry. Plate distillers are currently supplied for merchant, offshore and naval applications, confirming the breadth of these downstream markets.

Regional Insights

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Asia-Pacific is the central region for newbuild-related Marine Plate-Type Fresh Water Generator demand because global shipbuilding is highly concentrated in China, the Republic of Korea and Japan. In 2025, these three countries accounted for approximately 91% of ships completed, while China alone represented more than half of global ship deliveries measured in compensated gross tonnage. Europe remains important in high-efficiency equipment development, installed-base replacement and global marine service. Japan and Korea retain strong positions in technically demanding merchant-vessel equipment, while China is strengthening local production alongside its dominant shipbuilding base. North America represents a smaller newbuild market but maintains specialized demand from naval, offshore and replacement applications.

Competitive Landscape Analysis

The competitive structure is moderately concentrated at the global level but more fragmented in regional replacement and service markets. European suppliers have advantages in thermal engineering, integrated plate technology and global lifecycle service, while Japanese and Korean manufacturers benefit from long-standing relationships with major Asian shipyards and extensive merchant-vessel installed bases. Chinese manufacturers are becoming more relevant as domestic equipment localization progresses alongside the world’s largest shipbuilding production base. North American suppliers participate more selectively, with stronger exposure to naval, offshore and specialized replacement markets. Competitive differentiation is increasingly shifting from basic freshwater-production capacity toward energy efficiency, compactness, low-salinity output, multi-stage thermal utilization, maintainability, certification coverage and global service capability.

Report Scope

This report studies the global Marine Plate-Type Fresh Water Generator production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Marine Plate-Type Fresh Water Generator and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Marine Plate-Type Fresh Water Generator that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Marine Plate-Type Fresh Water Generator total production and demand, 2021-2032, (Units)

Global Marine Plate-Type Fresh Water Generator total production value, 2021-2032, (USD Million)

Global Marine Plate-Type Fresh Water Generator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Marine Plate-Type Fresh Water Generator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Marine Plate-Type Fresh Water Generator domestic production, consumption, key domestic manufacturers and share

Global Marine Plate-Type Fresh Water Generator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Marine Plate-Type Fresh Water Generator production by Evaporation Stage, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Marine Plate-Type Fresh Water Generator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Marine Plate-Type Fresh Water Generator market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Alfa Laval AB, DongHwa Entec Co., Ltd., Sasakura Engineering Co., Ltd., GEA Group Aktiengesellschaft, HANSUN (Shanghai) Marine Technology Co., Ltd., ILSEUNG Co., Ltd., PG Flow Solutions AS, Polaris Plate Heat Exchangers, Saur, etc.

This report also provides key insights about market drivers, restraints, opportunities,

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new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Marine Plate-Type Fresh Water Generator market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by manufacturer, by Evaporation Stage, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Marine Plate-Type Fresh Water Generator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Marine Plate-Type Fresh Water Generator Market, Segmentation by Evaporation Stage:

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Single-Stage Plate-Type (1 Stage)

Two-Stage Plate-Type (2 Stages)

Multi-Effect (?3 Stages/Effects)

Others

Global Marine Plate-Type Fresh Water Generator Market, Segmentation by Heating Source:

Jacket Water Heated

Steam Heated

Multiple Heat Source

Others

Global Marine Plate-Type Fresh Water Generator Market, Segmentation by Freshwater Production Capacity:

?10 m^3/day

>10–30 m^3/day

>30–60 m^3/day

>60 m^3/day

Global Marine Plate-Type Fresh Water Generator Market, Segmentation by Application:

Merchant Cargo Vessels

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Tankers

Passenger Ships and Ferries

Offshore and Support Vessels

Naval and Government Vessels

Others

Companies Profiled:

Alfa Laval AB

DongHwa Entec Co., Ltd.

Sasakura Engineering Co., Ltd.

GEA Group Aktiengesellschaft

HANSUN (Shanghai) Marine Technology Co., Ltd.

ILSEUNG Co., Ltd.

PG Flow Solutions AS

Polaris Plate Heat Exchangers

Saur

Key Questions Answered

1. How big is the global Marine Plate-Type Fresh Water Generator market?
2. What is the demand of the global Marine Plate-Type Fresh Water Generator market?
3. What is the year over year growth of the global Marine Plate-Type Fresh Water Generator market?

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4. What is the total value of the global Marine Plate-Type Fresh Water Generator market?
5. Who are the Major Players in the global Marine Plate-Type Fresh Water Generator market?
6. What are the growth factors driving the market demand?

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