

Global Vapor Recovery Units Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G90DD37A0C6AEN.html>

Date: September 2026

Pages: 163

Price: US\$ 4,480.00 (Single User License)

ID: G90DD37A0C6AEN

Abstracts

The global Vapor Recovery Units market size is expected to reach \$ 635 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

A vapor recovery unit is an environmental protection device designed to collect, process, and recover volatile organic compounds (VOCs) and hydrocarbon vapors. By employing technologies such as adsorption, absorption, condensation, membrane separation, and compression, the unit captures vapors escaping during storage, transportation, loading/unloading, and processing. It converts these vapors into reusable liquid hydrocarbons or gases that meet emission standards, thereby minimizing resource loss and reducing environmental pollution. Typically composed of a vapor collection system, pretreatment unit, recovery and processing unit, compression or vacuum system, control system, and safety protection devices, these units are widely used in sectors such as petroleum refining, oil storage and transportation, gas stations, oil depots, terminals, chemical manufacturing, and natural gas processing. They serve to enhance the efficiency of hydrocarbon resource utilization, control volatile emissions, and ensure compliance with environmental regulations.

Key Findings

Vapor Recovery Units are critical environmental protection equipment for hydrocarbon emission control

Global VRU demand is mainly driven by oil storage, transportation and petrochemical applications

Large-capacity industrial VRU systems represent higher-value equipment segments

Asia Pacific is an important growth region supported by expanding energy infrastructure

Market competition focuses on recovery efficiency, reliability and customized engineering capability

In 2025, global sales of vapor recovery units are projected to reach 1,770 units, with a production capacity of approximately 2,500 units; the average selling price is \$265,000 per unit, and the average gross profit margin ranges from 25% to 35%.

Market Trends

The Vapor Recovery Unit industry is moving toward higher recovery efficiency, lower energy consumption and intelligent operation management. Equipment suppliers are increasingly improving system integration through advanced separation technologies, automation control platforms and real-time monitoring functions. Customer demand is shifting from basic emission compliance toward comprehensive resource recovery solutions that improve hydrocarbon utilization efficiency and operational safety. Modularized equipment design, compact installation structures and customized solutions for different oil and gas processing environments are becoming important development directions.

Market Dynamics

Drivers

Increasing environmental regulations related to VOC emissions, continuous expansion of oil storage and transportation infrastructure, and growing demand for energy efficiency are major factors supporting the adoption of Vapor Recovery Units. Oil terminals, refineries and fuel distribution networks are increasingly investing in emission control equipment to improve environmental performance and recover valuable hydrocarbon resources.

Restraints

The market faces limitations from high initial investment requirements, complex project engineering processes and different technical requirements across operating environments. Equipment performance is strongly influenced by vapor composition, flow rate, pressure conditions and site-specific factors, increasing the difficulty of standardization and large-scale deployment.

Opportunities

Future opportunities are emerging from the modernization of petroleum infrastructure, upgrading of existing storage facilities and increasing adoption of integrated VOC management systems. Advanced recovery technologies, digital monitoring platforms and energy-saving designs provide additional opportunities for suppliers to improve product value and expand application scenarios.

Challenges

The industry faces challenges related to technology adaptation, project customization complexity and competition among different emission control technologies. Suppliers need to continuously improve system reliability, recovery performance and lifecycle service capabilities to address increasingly strict environmental requirements and diverse customer demands.

Industry Chain Analysis

The Vapor Recovery Unit industry chain covers upstream components and materials, midstream equipment design and manufacturing, and downstream application sectors. The upstream segment includes compressors, adsorption materials, refrigeration components, valves, sensors, control systems and structural materials. These components directly influence equipment efficiency, reliability and operating cost. The midstream segment focuses on system engineering, process design, equipment integration, manufacturing and installation services, where technological capability and project experience determine product competitiveness.

The downstream market mainly includes oil terminals, refineries, fuel storage facilities, petrochemical plants, transportation hubs and marine loading facilities. Value creation in

the industry is achieved through improving hydrocarbon recovery rates, reducing emission losses and providing customized solutions according to different operating conditions. Profitability is mainly influenced by equipment complexity, engineering integration capability and after-sales service requirements.

Segment Insights

Vapor Recovery Units can be segmented by technology route, processing capacity, application scenario and configuration level. From a technology perspective, adsorption recovery, condensation recovery, membrane separation and compression-based recovery represent major technical directions. Large-scale industrial recovery systems generally require higher technical integration and provide greater equipment value, while smaller systems have wider deployment volumes in fuel distribution and storage applications.

From a parameter perspective, processing capacity, recovery efficiency, operating pressure, vapor composition adaptability and explosion-proof requirements are key factors determining product selection. High-capacity systems with advanced control functions and customized engineering solutions represent important market opportunities as customers increasingly emphasize operational stability and environmental performance.

Downstream Market Opportunities

The downstream opportunities of Vapor Recovery Units are concentrated in petroleum storage, transportation and processing industries. Fuel terminals, refineries and petrochemical facilities require continuous improvement of emission control performance and resource utilization efficiency. Emerging opportunities are also developing in offshore loading, marine transportation and upgraded fuel infrastructure, where stricter environmental requirements create demand for advanced vapor recovery technologies.

Regional Insights

The global Vapor Recovery Unit market shows regional differences based on energy infrastructure development, environmental regulations and petroleum industry maturity. North America and Europe represent important markets due to established oil and gas

infrastructure and strict emission control requirements. These regions generally focus on upgrading existing facilities, improving recovery efficiency and replacing aging equipment.

Asia Pacific represents a significant growth opportunity due to expanding petroleum storage capacity, refinery construction and industrial infrastructure development. China, Southeast Asia and other emerging energy markets are increasing investment in environmental protection equipment, creating demand for both new installations and retrofit projects. Regional market competition is increasingly influenced by local engineering capability, cost efficiency and compliance with environmental standards.

Competitive Landscape Analysis

The Vapor Recovery Unit market includes global environmental equipment suppliers, oil and gas engineering companies and specialized VOC control equipment manufacturers. Competition is mainly based on technology capability, system integration experience, equipment reliability and customization ability rather than standardized product scale alone. Companies with strong engineering capabilities can provide complete solutions covering design, manufacturing, installation and maintenance services. Future competitive differentiation is expected to focus on improving recovery efficiency, reducing energy consumption and integrating digital monitoring functions.

Report Scope

This report studies the global Vapor Recovery Units production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Vapor Recovery Units 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 Vapor Recovery Units that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Vapor Recovery Units total production and demand, 2021-2032, (Units)

Global Vapor Recovery Units total production value, 2021-2032, (USD Million)

Global Vapor Recovery Units production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Vapor Recovery Units consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Vapor Recovery Units domestic production, consumption, key domestic manufacturers and share

Global Vapor Recovery Units production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Vapor Recovery Units production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Vapor Recovery Units production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Vapor Recovery Units 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 Alma Group, Borsig (KNM Group Berhad), John Zink Hamworthy Combustion, Symex Technologies, Aereon, Cool Sorption, VOCZero, Zeeco, Unimac (Air Mac), Kappa GI, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Vapor Recovery Units market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Units) and average price (K USD/Unit) by manufacturer, by Type, 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 Vapor Recovery Units Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Vapor Recovery Units Market, Segmentation by Type:

Condensation Vapor Recovery Unit

Adsorption Vapor Recovery Unit

Absorption Vapor Recovery Unit

Membrane Separation Vapor Recovery Unit

Global Vapor Recovery Units Market, Segmentation by Current Stage of the Recovery Process:

Stage I Recovery System (Unloading Phase)

Stage II Recovery System (Refueling Phase)

Stage III Recovery System (Terminal Treatment)

Global Vapor Recovery Units Market, Segmentation by Oil and Gas Flow Rate:

Less than 500 m³/h

500-2000 m³/h

More than 2000 m³/h

Global Vapor Recovery Units Market, Segmentation by Application:

Gas Station

Tank Truck

Oilfield & Oil Refinery

Oil Depot

Companies Profiled:

Alma Group

Borsig (KNM Group Berhad)

John Zink Hamworthy Combustion

Symex Technologies

Aereon

Cool Sorption

VOCZero

Zeeco

Unimac (Air Mac)

Kappa GI

Kilburn Engineering

S&S Technical

Platinum Control

OTA Compression

Blackmer (PSG)

PetroGas Systems

AQT

CORKEN

Bay Environmental Technology

Jiangsu Jinmen

Shenzhen Autoware Science&Technology

Hubei Hongyi

Key Questions Answered

1. How big is the global Vapor Recovery Units market?
2. What is the demand of the global Vapor Recovery Units market?
3. What is the year over year growth of the global Vapor Recovery Units market?
4. What is the total value of the global Vapor Recovery Units market?
5. Who are the Major Players in the global Vapor Recovery Units market?
6. What are the growth factors driving the market demand?

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