

Global Forged Pressure Vessel Shell Sections Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Forged Pressure Vessel Shell Sections market size is predicted to grow from US\$ 942 million in 2025 to US\$ 1388 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Forged Pressure Vessel Shell Sections are integrally formed, seamless cylindrical or ring-shaped pressure-retaining shell components manufactured from carbon steel, low-alloy steel, stainless steel, or other pressure-vessel-grade alloys through open-die forging, hollow forging, mandrel expansion, radial-axial ring rolling, or combined forging-and-rolling processes. Each forging generally forms an individual shell section of a pressure vessel and is joined with adjacent shell sections, heads, flanges, or nozzle sections to constitute the principal pressure boundary designed to withstand internal or external pressure under operating conditions that may involve elevated or low temperatures, corrosive media, irradiation, or cyclic loading. Forged Pressure Vessel Shell Sections may be supplied in the as-forged, heat-treated, rough-machined, or finish-machined condition and are primarily used in reactor pressure vessels, steam generators, petrochemical and coal-chemical reactors, high-pressure heat-transfer equipment, industrial gas and hydrogen storage vessels, and other heavy-duty pressure equipment.

Key Findings

The average gross margin of the Forged Pressure Vessel Shell Sections industry is estimated at approximately 22%

Asia-Pacific is the largest production and demand market

Straight Cylindrical Shell Forgings represent the largest structural segment

Nuclear Pressure Equipment is the largest downstream application by value

The high-end market is concentrated among suppliers with integrated steelmaking and heavy-forging capabilities

Market Trends

Forged Pressure Vessel Shell Sections are moving toward larger monoblock structures, fewer welded joints, higher material cleanliness and more extensive delivery in rough- or finish-machined condition. Nuclear and high-pressure process-equipment customers increasingly favor ring-forged shells, integral nozzle belts, integral flanges and near-net-shape transition sections because these designs reduce longitudinal welds, simplify inspection and improve the continuity of the pressure boundary. Steelmaking control is becoming more important as larger ingots increase the risks of segregation, porosity and non-uniform properties; vacuum treatment, electroslag remelting for selected grades, controlled forging ratios, numerical simulation and carefully engineered quenching cycles are therefore becoming standard differentiators among qualified suppliers. Manufacturing is also shifting from the sale of black forgings toward integrated packages combining metallurgy, forging, heat treatment, ultrasonic examination, mechanical testing, machining and complete digital documentation. In nuclear applications, demand is increasingly linked to serial production programs, supply-chain localization and designs intended to reduce the number of welded vessel sections. In non-nuclear applications, demand is concentrated in high-severity hydroprocessing, petrochemical and coal-conversion equipment, while hydrogen storage and special high-pressure systems remain smaller but technically attractive emerging segments.

Market Dynamics

Drivers

The primary market driver is the continuing construction and replacement cycle for nuclear pressure equipment. By late 2025, 63 power reactors were under construction globally, creating multi-year requirements for reactor pressure vessel and steam generator shells, while the French EPR2 program alone covers six reactor pressure vessels and 24 steam generators. Demand is further supported by refinery upgrading, residue conversion, hydrogenation and coal-chemical projects that require thick-wall low-

alloy steel reactor shells capable of operating under high temperature, pressure and corrosive or hydrogen-rich conditions. Vessel manufacturers also have a structural incentive to replace plate-rolled and heavily welded configurations with larger forged sections where economics and equipment size permit, as fewer welds can reduce fabrication, inspection and lifecycle-maintenance requirements.

Restraints

Market expansion is constrained by high capital intensity, long qualification cycles and irregular project timing. Large shell forgings require high-capacity steelmaking, large ingots, heavy presses or ring mills, deep heat-treatment furnaces, large vertical lathes and extensive nondestructive testing infrastructure, making economical capacity utilization difficult without a sustained order backlog. Nuclear-grade products also require customer-specific qualification, audited quality systems, material traceability and long documentation-retention periods. For less demanding pressure vessels, plate-rolled welded shells, seamless pipe sections or fabricated alternatives can remain more economical, limiting the addressable market for forged shells. Large forgings are also exposed to high scrap costs because a metallurgical defect discovered after forging, heat treatment or machining can invalidate months of production and a substantial amount of alloy steel.

Opportunities

The strongest opportunity lies in the expansion and regionalization of nuclear manufacturing supply chains. New-build programs in China, Korea, Russia, France and India, together with emerging small modular reactor and advanced-reactor projects, are encouraging additional qualification of heavy-forging capacity and renewed investment in monoblock and integral-feature components. North American Forgemasters is developing commercial nuclear and SMR forgings, including shells with integral nozzles, while Framatome is expanding industrial capacity for the EPR2 program. Outside nuclear power, opportunities are emerging in high-pressure hydrogen storage, low-emissions fuel production, CCUS-related process equipment, renewable-fuel hydrotreating and high-pressure materials-processing vessels. The most attractive opportunities are likely to favor suppliers able to provide complete metallurgical and machining packages rather than basic forging alone.

Challenges

The central industry challenge is delivering uniform properties through extremely large and thick sections while controlling segregation, grain size, residual stress, distortion

and ultrasonic indications. Suppliers must balance sufficient forging deformation and rapid, uniform quenching against dimensional accuracy and cracking risk. Project concentration creates additional commercial risk because annual demand can be affected by the timing of a small number of nuclear islands or very large petrochemical reactors. Energy, alloy and scrap-price volatility can materially change contract economics during long production cycles, while geopolitical restrictions, nuclear-export controls and localization policies can limit the usable supplier pool. Consolidated group structures also complicate market measurement: some shells are sold externally, while others are transferred internally into complete reactor vessels or steam generators, requiring a distinction between external sales revenue and captive production value.

Industry Chain Analysis

The upstream chain consists of high-quality scrap, iron units, ferroalloys, nickel, chromium, molybdenum and other alloying materials, refractories, electrodes, energy and large-ingot steelmaking capacity. Shell-forging producers may purchase qualified ingots or operate integrated electric-arc or specialty steelmaking facilities with vacuum degassing and, for selected grades, remelting capability. The midstream value chain covers ingot conditioning, upsetting, piercing, hollow forging, mandrel expansion, open-die drawing, radial-axial ring rolling, preliminary and final heat treatment, rough machining, ultrasonic and surface examination, mechanical testing and finish machining. The greatest value is created through metallurgical consistency, control of thick-section properties, nuclear or pressure-equipment qualification, near-net-shape forming and complete traceability documentation rather than through steel weight alone. Downstream customers include nuclear-island equipment manufacturers, pressure-vessel OEMs, boiler and heat-exchanger manufacturers, petrochemical equipment companies, engineering contractors and integrated energy-equipment groups. Captive use is important because several leading companies manufacture both shell forgings and complete pressure vessels.

Segment Insights

Straight Cylindrical Shell Forgings account for approximately three-quarters of shipment tonnage and form the standard body sections of reactor vessels, steam generators, hydroprocessing reactors and other cylindrical pressure equipment. Conical and Transition Shell Forgings represent a smaller but higher-complexity segment used to connect shell sections of different diameters or wall thicknesses. The Others category mainly covers special-contour shells, integral-nozzle shells, shell-flange combinations and customer-specific monoblock structures that cannot be classified as conventional

straight or transition sections. These products generally achieve higher unit values because of additional forming complexity, machining content and inspection requirements.

By manufacturing process, Ring-Rolled and Forged-and-Rolled Shells are estimated to represent slightly more than half of market value, supported by their widespread use in nuclear steam generators, reactor vessels and large process-equipment rings. The process permits efficient diameter expansion, controlled wall reduction and favorable circumferential grain flow, particularly for relatively short, large-diameter shells. Open-Die and Mandrel-Forged Shells remain essential for very thick sections, longer cylinders, lower-volume custom geometries and products with integrated structural features. The two routes are complementary because ring-rolled shells normally begin with open-die upset and pierced preforms, while the final classification depends on the process that establishes the finished shell geometry.

Downstream Market Opportunities

Nuclear Pressure Equipment contributes slightly above 40% of market value and remains the most attractive high-value application because each project requires large low-alloy steel shells supported by nuclear-grade steelmaking, heat treatment, examination and documentation. Petrochemical and Coal-Chemical Reactors represent approximately one-third of market value, with demand concentrated in hydroprocessing, hydrocracking, residue conversion, coal conversion and other high-temperature, high-pressure reactors. High-Pressure Heat Exchangers and Process Vessels provide broader but more fragmented demand, while forged-shell penetration depends on pressure, wall thickness, material grade and the economic advantage over welded plate construction. High-Pressure Storage Vessels and other special applications currently account for a smaller share, but hydrogen infrastructure, advanced process plants and high-pressure materials treatment may gradually expand the addressable market.

Regional Insights

Asia-Pacific is the world's largest market for Forged Pressure Vessel Shell Sections, accounting for more than half of global demand and hosting a substantial share of heavy-forging and pressure-equipment manufacturing capacity. China combines the world's leading nuclear construction pipeline with a complete petrochemical and coal-chemical industrial base and a mature heavy-equipment manufacturing sector, providing stable market demand for China First Heavy Industries, Erzhong Heavy Equipment, Shanghai Electric SHMP Casting & Forging, Iraeta Energy Equipment, and

Tongyu Heavy Industry. In South Korea, Doosan Enerbility is the principal supplier and maintains strong competitiveness in nuclear primary equipment and large ring-forged shell sections. Japan relies on The Japan Steel Works and Kobe Steel to sustain long-standing technical advantages in high-cleanliness steelmaking, ultra-heavy forging, thick-section heat treatment, and nuclear-grade shell manufacturing. At the end of 2024, China accounted for 46% of global nuclear capacity under construction, continuing to support demand for nuclear-grade shell forgings across Asia-Pacific.

Europe remains an important production region for high-value Forged Pressure Vessel Shell Sections. Major participants include Framatome through Creusot Forge, AEM-Technologies through AEM-Special Steels, Ring Mill, and Sheffield Forgemasters. Regional demand is supported by new-build and replacement nuclear projects in Europe, Russian nuclear-equipment programs, and the petrochemical and process-equipment manufacturing sectors. North America represents a relatively smaller market, although Scot Forge and Lehigh Heavy Forge retain specialized capabilities in large open-die forgings, pressure-vessel shells, and nuclear components. In India, L&T Special Steels and Heavy Forgings serves nuclear, oil and gas, and high-pressure process-equipment customers through its large-ingot steelmaking, heavy-forging, and machining capabilities.

Competitive Landscape

The global Forged Pressure Vessel Shell Sections market is highly concentrated in nuclear-grade and ultra-heavy products. Doosan Enerbility, China First Heavy Industries, Erzhong Heavy Equipment, The Japan Steel Works, Framatome through Creusot Forge, and AEM-Technologies through AEM-Special Steels form the core supplier group. These companies possess capabilities in large-ingot steelmaking, ultra-heavy forging, thick-section heat treatment, nondestructive examination, and precision machining, together with project experience in reactor pressure vessels, steam generators, or large petrochemical reactors. They hold strong positions in nuclear-grade and other technically demanding product segments.

Kobe Steel, Shanghai Electric SHMP Casting & Forging, and L&T Special Steels and Heavy Forgings maintain strong competitiveness in forgings for nuclear power, refining and petrochemical equipment, and high-pressure process systems. Scot Forge, Lehigh Heavy Forge, Ring Mill, and Sheffield Forgemasters primarily serve specialized customers through large open-die forging, ring rolling, hollow forging, and custom machining capabilities. Iraeta Energy Equipment and Tongyu Heavy Industry leverage China's large-forging manufacturing base to compete in shell forgings for

petrochemical, coal-chemical, high-pressure vessel, and other non-nuclear pressure-equipment applications. Competition is primarily determined by maximum ingot and shell size, material cleanliness, thick-section property uniformity, heat-treatment capability, ultrasonic inspection quality, nuclear qualifications, machining range, and project-delivery reliability.

Report Scope

LPI (LP Information)' newest research report, the “Forged Pressure Vessel Shell Sections Industry Forecast” looks at past sales and reviews total world Forged Pressure Vessel Shell Sections sales in 2025, providing a comprehensive analysis by region and market sector of projected Forged Pressure Vessel Shell Sections sales for 2026 through 2032. With Forged Pressure Vessel Shell Sections sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Forged Pressure Vessel Shell Sections industry.

This Insight Report provides a comprehensive analysis of the global Forged Pressure Vessel Shell Sections landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Forged Pressure Vessel Shell Sections portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Forged Pressure Vessel Shell Sections market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Forged Pressure Vessel Shell Sections and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Forged Pressure Vessel Shell Sections.

This report presents a comprehensive overview, market shares, and growth opportunities of Forged Pressure Vessel Shell Sections market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Straight Cylindrical Shell Forgings

Conical and Transition Shell Forgings

Others

Segmentation by Primary Forming Process:

Open-Die and Mandrel-Forged Shells

Ring-Rolled and Forged-and-Rolled Shells

Segmentation by Application:

Nuclear Pressure Equipment

Petrochemical and Coal-Chemical Reactors

High-Pressure Heat Exchangers and Process Vessels

High-Pressure Storage Vessels

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Doosan Enerbility

The Japan Steel Works

AEM-Technologies (AEM-Special Steels)

Framatome (Creusot Forge)

Kobe Steel

L&T Special Steels and Heavy Forgings

Scot Forge

Lehigh Heavy Forge

Ring Mill

Sheffield Forgemasters

China First Heavy Industries

Erzhong (Deyang) Heavy Equipment

Shanghai Electric SHMP Casting & Forging

Iraeta Energy Equipment

Tongyu Heavy Industry

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