

Global Marine Exhaust Gas Heat Exchangers Market Growth 2026-2032

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Abstracts

The global Marine Exhaust Gas Heat Exchangers market size is predicted to grow from US\$ 325 million in 2025 to US\$ 475 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

Marine Exhaust Gas Heat Exchangers are marine heat-recovery devices installed in the exhaust path of main engines, auxiliary engines or generator sets to transfer otherwise wasted exhaust heat into steam, hot water, thermal oil or other useful thermal media. The market covers dedicated marine exhaust gas economizers, exhaust gas boilers used primarily for heat recovery, hot-water exhaust gas economizers and thermal-oil exhaust gas heaters. Commercial designs mainly use smoke-tube or water-tube configurations, while bare tubes, finned or gilled tubes, pin tubes and other extended heating surfaces are selected according to exhaust temperature, gas flow, allowable back pressure, heat-recovery duty and fouling conditions. Steam-oriented systems remain the mainstream configuration, while hot-water and thermal-oil units serve vessel heating and specialized process requirements. Products may recover heat from a single main engine, auxiliary or generator engine, or multiple exhaust sources, and can be supplied as standalone economizers, integrated exhaust gas boilers, composite-boiler sections or combined economizer-silencer modules. The equipment is widely used on container ships, bulk carriers, tankers, gas carriers, passenger vessels, ferries and offshore or specialized vessels. Commercial products span compact auxiliary-engine economizers through multi-megawatt heat-recovery units, reflecting substantial variation in steam capacity, design pressure, installation space and vessel duty.

Key Findings The weighted equivalent project value of marine exhaust gas heat exchangers was approximately US\$160,000–190,000 per unit in 2025. Steam-based systems remain the mainstream product type. Asia-Pacific is the largest newbuild

installation market for marine exhaust gas heat exchangers. Compact designs, deeper waste heat recovery, multi-engine configurations, and integrated economizer-silencer solutions are the key product upgrade trends.

Market Trends

Product development is shifting from conventional single-function exhaust gas economizers toward compact, modular and more deeply integrated heat-recovery equipment. Extended heating surfaces such as finned, gilled and other enhanced tubes are increasingly used to raise heat-transfer density while controlling footprint and weight. Forced-circulation systems, integrated bypasses, dry-running capability and modular tube sections are also improving operational flexibility under variable engine loads and simplifying maintenance. Major commercial products already cover steam capacities from compact auxiliary-engine applications to substantially larger main-engine installations; for example, established water-tube economizer platforms can reach steam capacities of up to 17 tonnes per hour, while thermal-fluid units are commercially available across a 100–5,000 kW range.

Another important trend is the expansion of the addressable heat source. Marine waste-heat recovery is no longer limited to a single propulsion engine. Auxiliary engines, generator sets and multiple-engine arrangements are increasingly being considered, particularly where vessels have significant hotel loads, electrical loads or variable propulsion profiles. Integrated economizer-silencer designs also demonstrate how suppliers are combining heat recovery with other exhaust-system functions to reduce installation footprint.

Market Dynamics

Drivers

Fuel-cost reduction and vessel energy-efficiency requirements remain the principal demand drivers. Exhaust gas heat exchangers recover thermal energy that would otherwise be discharged through the stack, reducing dependence on fired auxiliary boilers and lowering fuel consumption. IMO recognizes waste heat recovery as one of the available technical measures for improving ship energy efficiency under the EEXI framework, while CII creates an additional operational incentive for shipowners to reduce carbon intensity.

A second driver is the large newbuilding pipeline and installed commercial fleet. At the

beginning of 2026, the global merchant fleet comprised approximately 116,000 vessels of at least 100 GT, including around 62,000 vessels above 1,000 GT. This installed base creates recurring demand for replacement, tube-section renewal, capacity upgrades and selected energy-efficiency retrofits in addition to OEM installations on new vessels.

Restraints

The market is constrained by its mature technology base and already-established penetration on larger ocean-going vessels. Retrofit projects must also accommodate limited engine-room space, additional equipment weight, exhaust-system modifications and acceptable engine back pressure. The economic case varies materially by vessel operating profile, remaining service life, fuel consumption and available onboard heat demand. Consequently, not every vessel with recoverable exhaust heat is an economically viable retrofit candidate.

Opportunities

The clearest opportunities lie in compact retrofit economizers, auxiliary-engine heat recovery, multi-engine systems and deeper utilization of lower-grade exhaust heat. Designs capable of fitting restricted machinery spaces or combining an economizer with a silencer can expand the retrofit addressable market. Additional opportunities arise where recovered steam or thermal energy can support onboard heating, process loads or downstream power-generation equipment without requiring a complete redesign of the vessel energy system.

Challenges

Technical challenges center on soot deposition, low-temperature corrosion, thermal cycling, fluctuating engine loads and pressure-drop control. More aggressive heat recovery can lower exhaust outlet temperature but simultaneously increase condensation and fouling risks, making surface design, bypass control, cleaning access and materials selection increasingly important. Suppliers therefore compete not only on nominal heat-transfer efficiency, but also on lifecycle reliability, maintainability and the ability to operate safely across a wide engine-load envelope.

Industry Chain Analysis

The upstream supply chain consists mainly of pressure-vessel steel, stainless and alloy

tubing, finned or pin-tube heat-transfer components, welding materials, insulation, valves, pumps, soot-cleaning components, instrumentation and control equipment. Midstream manufacturers carry out thermal design, pressure-vessel engineering, tube fabrication, welding, casing manufacture, system integration, testing and classification-society certification. The downstream customer base includes shipyards, shipowners, marine engineering contractors and vessel operators, with installations connected to main engines, auxiliary engines, steam systems, hot-water circuits or thermal-oil systems. Aftermarket services include inspection, cleaning, tube replacement, pressure-part repairs, controls and efficiency upgrades.

Value Chain Analysis

Value creation is concentrated in thermal and mechanical engineering rather than in raw materials alone. Manufacturers must balance heat-transfer efficiency against exhaust back pressure, footprint, vibration resistance, fouling, corrosion and vessel-specific integration requirements. Classification approval, welding quality, pressure-part fabrication experience and global marine service capability further raise entry barriers. Higher-value projects typically involve greater steam capacity, more complex circulation arrangements, multiple exhaust sources, specialized heat-transfer surfaces or integrated control and bypass functions. Aftermarket maintenance and replacement parts provide an additional lifecycle value pool because exhaust-side equipment operates continuously in a highly contaminated and thermally demanding environment.

Segment Insights

By heat-recovery medium, steam is the mainstream configuration, supported by mature onboard steam systems and broad applications in fuel heating, cargo-related duties, hotel loads and other thermal consumers. Hot-water units occupy an important position where central heating demand dominates, while thermal-oil systems serve vessels that prefer closed-loop high-temperature heat transfer. Commercial marine portfolios confirm the coexistence of steam economizers and dedicated exhaust-gas thermal-oil heaters.

By flow configuration, smoke-tube and water-tube designs remain the two principal architectures. By heating surface, bare-tube, finned or gilled-tube and pin-tube configurations represent the main commercial approaches. By exhaust source, main-engine systems generally address larger individual heat loads, while auxiliary-engine and genset systems expand recovery opportunities during vessel operating conditions where propulsion-engine exhaust availability is reduced. Multi-engine configurations are becoming more relevant where several generator sets operate according to electrical

demand.

Downstream Market Opportunities

Large ocean-going commercial vessels remain the fundamental demand base because they combine high engine operating hours with meaningful onboard thermal requirements. Newbuild opportunities are concentrated in container ships, bulk carriers, tankers, gas carriers and other large commercial vessels, while passenger ships, ferries and specialized vessels can offer attractive applications where hotel and heating loads are substantial. The retrofit opportunity is more selective but potentially attractive for vessels with sufficient remaining service life, high annual fuel consumption and adequate machinery-space integration conditions.

Auxiliary-engine heat recovery is an increasingly attractive sub-segment because many modern vessels operate substantial electrical generation capacity even when propulsion load is reduced. Compact economizers designed specifically for auxiliary engines can therefore recover energy during port operations, maneuvering and low-load sailing conditions that are less favorable for conventional main-engine-only waste heat recovery.

Regional Insights

Asia-Pacific is the primary demand and installation region because global shipbuilding is overwhelmingly concentrated in East Asia. In 2025, approximately 91% of completed ship tonnage was built in China, the Republic of Korea or Japan, creating a strong local ecosystem linking shipyards, marine boiler manufacturers, economizer suppliers and classification services. China also represents an increasingly important manufacturing base for pin-tube and finned-tube marine economizers, while Korea and Japan retain strong positions in marine boiler and auxiliary machinery engineering.

Europe remains an important high-value technology and engineering center, particularly in advanced waste-heat recovery, compact retrofit solutions, modular designs and specialized thermal systems. North America has a smaller dedicated manufacturing base but retains opportunities in fleet retrofit, marine service and specialized vessels. Southeast Asia and the Middle East are more important as ship-operation, repair and service markets than as major manufacturing centers for dedicated marine exhaust gas heat exchangers.

Competitive Landscape Analysis

The competitive structure is moderately concentrated and specialized rather than fragmented like the general industrial heat-exchanger market. The confirmed core supplier pool comprises 11 manufacturers, with the strongest manufacturing clusters located in Europe, Japan, the Republic of Korea and China. Competition is shaped by marine references, shipyard relationships, classification approvals, heat-transfer engineering, pressure-vessel manufacturing capability and global lifecycle service rather than equipment price alone.

Regional competitive advantages differ. European suppliers are particularly strong in advanced heat-recovery engineering and retrofit-oriented solutions; Japanese and Korean suppliers benefit from long-standing relationships with major Asian shipyards and established marine boiler portfolios; Chinese manufacturers benefit from proximity to the world's largest shipbuilding base and competitive fabrication capability. The resulting market structure favors experienced suppliers with proven vessel installations, while smaller manufacturers can compete effectively in regional newbuilding, replacement and customized projects.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Marine Exhaust Gas Heat Exchangers Industry Forecast" looks at past sales and reviews total world Marine Exhaust Gas Heat Exchangers sales in 2025, providing a comprehensive analysis by region and market sector of projected Marine Exhaust Gas Heat Exchangers sales for 2026 through 2032. With Marine Exhaust Gas Heat Exchangers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Marine Exhaust Gas Heat Exchangers industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Marine Exhaust Gas Heat Exchangers and breaks down

the forecast by Heat Recovery Medium, 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 Marine Exhaust Gas Heat Exchangers.

This report presents a comprehensive overview, market shares, and growth opportunities of Marine Exhaust Gas Heat Exchangers market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Heat Recovery Medium:

Steam

Hot Water

Thermal Oil

Others

Segmentation by Heat Exchanger Flow Configuration:

Smoke Tube

Water Tube

Others

Segmentation by Heat Transfer Surface:

Bare Tube

Finned or Gilled Tube

Pin Tube

Others

Segmentation by Application:

Container Ships

Bulk Carriers

Tankers

Gas Carriers

Passenger Ships and Ferries

Offshore and Specialized 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 analysing the company's coverage, product portfolio, its market penetration.

Alfa Laval AB

Kangrim Heavy Industries Co., Ltd.

SAACKE GmbH

MIURA CO., LTD.

OSAKA BOILER MFG. CO., LTD.

PARAT Halvorsen AS

TORTOISE ENGINEERING CO., LTD.

Babcock Wanson Group

Kelvion Holding GmbH

Ulmatec Group

Qingdao Kaineng Environmental Protection Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Marine Exhaust Gas Heat Exchangers market?

What factors are driving Marine Exhaust Gas Heat Exchangers market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Marine Exhaust Gas Heat Exchangers market opportunities vary by end market size?

How does Marine Exhaust Gas Heat Exchangers break out by Heat Recovery Medium, by Application?

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