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Global Pressurised Deaerators Market Growth 2026-2032

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Abstracts

The global Pressurised Deaerators market size is predicted to grow from US$ 657 million in 2025 to US$ 1022 million in 2032; it is expected to grow at a CAGR of 6.6% from 2026 to 2032.

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 CO?. 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

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boiler water treatment device that operates under controlled pressure (typically 0.2–0.6 MPa) and reduces dissolved oxygen (DO) and free CO? in feedwater to ? 0.02–0.03 mg/L through steam heating and a two-stage spray-pallet 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 ? (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.

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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, Nestl?, 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.

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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.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Pressurised Deaerators 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 Pressurised Deaerators portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Pressurised Deaerators market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Pressurised Deaerators 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 Pressurised Deaerators.

This report presents a comprehensive overview, market shares, and growth opportunities of Pressurised Deaerators market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Spray Style

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Tray Style

Segmentation by Installation Method:

Horizontal

Vertical

Segmentation by Processing Capacity:

10 t/h

500 t/h

Others

Segmentation by Application:

District Heating Stations

Hospital Energy Centers

Industrial

Others

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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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.

MINGAZZINI

Spirax Sarco

EUROWATER

Tomlinson

Industrial Steam

Lockwood

Sellers

Cleaver-Brooks

Babcock Wanson

VALSTEAM

Cochran

Atlantic Feedwater Systems

PC McKenzie

Shipco

Key Questions Addressed in this Report

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What is the 10-year outlook for the global Pressurised Deaerators market?

What factors are driving Pressurised Deaerators market growth, globally and by region?

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

How do Pressurised Deaerators market opportunities vary by end market size?

How does Pressurised Deaerators break out by Type, by Application?

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