

Global Tubular Heat Exchangers Market Growth 2026-2032

<https://marketpublishers.com/r/G759C1860E80EN.html>

Date: July 2026

Pages: 201

Price: US\$ 3,660.00 (Single User License)

ID: G759C1860E80EN

Abstracts

The global Tubular Heat Exchangers market size is predicted to grow from US\$ 8697 million in 2025 to US\$ 10967 million in 2032; it is expected to grow at a CAGR of 3.1% from 2026 to 2032.

Tubular heat exchangers are industrial heat transfer equipment that use metal or specialty-material tubes as the core heat transfer elements, transferring heat through temperature differences between the tube side and shell side, inner and outer tubes, or multiple coil paths. They are mainly used for fluid heating, cooling, condensation, evaporation, sterilization, heat recovery, and process temperature control. Their core value lies in maintaining stable thermal efficiency, structural strength, cleanability, and long-term operating reliability under demanding conditions such as high temperature, high pressure, corrosive media, high-viscosity products, particulate products, steam condensation, and continuous industrial production. Common products include shell and tube heat exchangers, double pipe heat exchangers, sanitary multitube heat exchangers, coiled tube heat exchangers, finned tube heat exchangers, and removable tube bundle heat exchangers. Typical applications cover chemical and petrochemical, food and beverage, pharmaceutical and bioprocessing, power and energy, marine and engine systems, HVAC utilities, and industrial waste heat recovery. Competition centers on thermal calculation, pressure vessel design, corrosion-resistant materials, welding and tube expansion quality, cleaning and maintenance convenience, certification capability, and custom engineering experience.

The long-term demand for tubular heat exchangers comes from the essential need for stable thermal management in industrial production. Chemical and petrochemical, power and energy, marine and engine systems, food and beverage, pharmaceutical and bioprocessing, and utility systems all require heating, cooling, condensation,

evaporation, sterilization, and heat recovery during continuous operations. Compared with plate heat exchangers, tubular heat exchangers usually offer stronger pressure resistance, wider temperature coverage, more flexible material options, and better suitability for custom engineering. As a result, they remain difficult to replace in high-temperature and high-pressure conditions, corrosive media, particulate fluids, high-viscosity products, and long-cycle continuous operations.

From a product structure perspective, the tubular heat exchanger market is characterized by the coexistence of multiple technical routes. Shell and tube heat exchangers remain the mainstream industrial form and are suitable for high-reliability applications in refining, chemicals, power generation, marine systems, and large utility projects. Double pipe and sanitary multitube heat exchangers are more suitable for continuous thermal treatment in food, beverages, dairy, juices, sauces, and products containing particles. Corrugated tubes, threaded tubes, twisted tubes, and coiled tube structures focus on enhanced heat transfer, fouling reduction, and compact design. Future selection will focus less on heat transfer area and purchase price alone, and more on thermal efficiency, pressure drop, cleaning cycle, corrosion risk, spare parts availability, and downtime cost over the full life cycle.

From a competitive landscape perspective, the tubular heat exchanger industry is not a simple market for standard equipment. It is an engineering-driven market in which order capability is determined by thermal design, pressure vessel manufacturing, material processing, welding and tube expansion, certification qualifications, and project experience. European and American companies have advantages in standardized product systems, international certifications, and high-end customer resources. Japanese and Korean companies have a stable base in local industrial and marine applications, while Chinese suppliers have developed strong manufacturing capabilities based on the chemical, petrochemical, energy, and large pressure vessel supply chains. The industry is unlikely to concentrate completely among a few suppliers, but high-end orders will continue to move toward companies with special-material processing capability, enhanced heat transfer technologies, engineering responsiveness, and long-term project references.

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

industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tubular Heat Exchangers and breaks down the forecast by Structural Form, 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 Tubular Heat Exchangers.

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

Segmentation by Structural Form:

Shell and Tube Type

Double Pipe Type

Segmentation by Heat Transfer Surface Material:

Carbon Steel

Stainless Steel

Copper Alloy

Titanium

Nickel-Based Alloy

Other

Segmentation by Connection and Fabrication Method:

Welded Type

Expanded Type

Expanded and Welded Type

Other

Segmentation by Application:

Process Fluid Heating

Process Fluid Cooling

Steam Condensation

Liquid Evaporation and Concentration

Food Sterilization and Thermal Processing

Industrial Waste Heat Recovery

Equipment Oil Thermal Management

Other

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 (Ashbrook Simon-Hartley)

SACOME

SPX FLOW Inc

Tetra Pak

L?hrfilter Ltd

Geurts International

GEA Group

Kelvion

API Heat Transfer

Xylem Standard Xchange

Enerquip Thermal Solutions

HRS Heat Exchangers

FUNKE

Barriquand Technologies Thermiques

Mersen

Quiri

EJ Bowman

Armstrong Fluid Technology

Wieland

GTS Thielmann

TANTEC Group

Kamui

Katsukawa Heat Engineering

Sanki Heat Exchanger

CHEMIARX

DASCO

KPHE Corporation

JUNG?ANG ENG

DongHwa Entec

Wuxi Chemical Equipment

Wuxi Dingbang Heat Exchange Equipment

Sunpower Technology (Jiangsu)

Jiangsu East-Regis Energy Equipment

Siping Juyuan Hanyang Plate Heat Exchanger

Shanghai Haoke Machinery Manufacturing

Jiangsu Henglida Machinery

Guangzhou Saiwell Thermal Equipment

Key Questions Addressed in this Report

What is the 10-year outlook for the global Tubular Heat Exchangers market?

What factors are driving Tubular Heat Exchangers market growth, globally and by region?

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

How do Tubular Heat Exchangers market opportunities vary by end market size?

How does Tubular Heat Exchangers break out by Structural Form, by Application?

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