

# Heat Exchanger Market by Type (Shell & Tube, Plate & Frame, Air Cooled), Material (Metal, Alloys, Brazing Clad Materials), End-Use Industry (Chemical, Energy, Hvacr, Food & Beverage, Power, Pulp & Paper), and Region - Global Forecast to 2029

<https://marketpublishers.com/r/HE4D0FA6188EN.html>

Date: May 2024

Pages: 322

Price: US\$ 4,950.00 (Single User License)

ID: HE4D0FA6188EN

## Abstracts

The Heat exchangers market is projected to reach USD 32.3 billion by 2029, at a CAGR of 7.0% from USD 23.0 billion in 2024. Growing awareness about energy efficiency and stringent building codes are driving the demand for high-performance insulation materials. Heat exchangers play a vital role in optimizing various industrial processes by controlling temperatures, facilitating heat transfer, and maintaining optimal operating conditions. They contribute to improved process efficiency, enhanced product quality, and increased production rates in industries such as chemical processing, oil refining, food and beverage, and pharmaceuticals. The demand for heat exchangers is driven by various industries that rely on heat transfer for their operations, including chemical processing, oil and gas, power generation, HVAC, refrigeration, and automotive. Growth in these industries, coupled with increasing industrialization and urbanization worldwide, fuels the demand for heat exchangers across diverse applications and markets.

“Based on type, plate & frame is expected to be the fastest growing market during the forecast period, in terms of value.”

Plate and frame heat exchangers have a compact design compared to traditional shell-and-tube heat exchangers. They offer a high heat transfer surface area relative to their size, allowing for efficient heat exchange in a smaller footprint. This compactness is particularly advantageous in applications where space is limited or where there is a need to minimize installation costs. These heat exchangers are highly efficient in transferring heat between fluids, which helps reduce energy consumption and operating

costs. By recovering and reusing waste heat, they contribute to energy conservation and sustainability efforts in industrial processes and HVAC systems.

“Based on end-use industry, Chemical is the largest market during the forecast period, in terms of value.”

Chemical processes often generate significant amounts of waste heat, which can be captured and reused through heat exchangers. By recovering waste heat from various process streams, heat exchangers help improve energy efficiency and reduce overall energy consumption in chemical manufacturing plants. This is particularly important in energy-intensive processes such as distillation, evaporation, and reaction heat management. Many chemical reactions require precise temperature control to achieve optimal reaction rates and product yields. Heat exchangers are essential for maintaining consistent temperatures.

“Based on region, Asia Pacific is the fastest growing market for heat exchangers in 2023, in terms of value.”

Asia Pacific is undergoing rapid industrialization and urbanization, leading to increased demand for heat exchangers across various industries such as chemical processing, oil and gas, power generation, HVAC, and food and beverage. Growing industrial activities and infrastructure development projects drive the need for heat exchangers to support heating, cooling, and thermal management applications.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees are as follows:

By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

By Designation: C-Level - 35%, Director Level - 25%, and Others - 40%

By Region: North America - 30%, Europe - 20%, Asia Pacific - 40%, Middle East & Africa-5%, and Latin America-5%

The key players in this market are ALFA LAVAL (Sweden), Kelvion Holding GmbH (Germany), Danfoss (Denmark), Exchanger Industries Limited (Canada), Mersen (France), API Heat Transfer (US), Boyd (US), H. G?ntner (UK) Limited (Germany),

Johnson Controls (Ireland), Xylem (US), Wabtec Corporation (US), SPX FLOW (US), LU-VE S.p.A. (Italy), Lennox International Inc. (US), and Modine Manufacturing Company (US).

## Research Coverage

This report segments the heat exchangers market based on material, type, end-use industry, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products and services, key strategies, new product launches, expansions, and mergers and acquisitions associated with the heat exchangers market.

## Key benefits of buying this report

This research report focuses on various levels of analysis, including industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the heat exchangers market, high-growth regions, and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (Increasing industrialization in emerging economies, Rising energy efficiency regulations and stringent emission standards), restraints (Fluctuation in raw material prices, Lack of awareness regarding energy efficiency in buildings), opportunities (Growing number of nuclear power plants, Growing aftermarket) and challenges (Regulations concerning fluorinated greenhouse gases, Capital intensive market).

**Market Penetration:** Comprehensive information on the heat exchangers market offered by top players in the global heat exchangers market.

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the heat exchangers market.

**Market Development:** Comprehensive information about lucrative emerging markets — the report analyzes the markets for heat exchangers market across

regions.

**Market Diversification:** Exhaustive information about new products, untapped regions, and recent developments in the global heat exchangers market

**Competitive Assessment:** In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the heat exchangers market

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\*Details on Business overview, Products/Solutions/Services offered, Recent Developments, Product launches, Deals, Expansions, MnM view, Right to win, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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## About

Heat Exchanger market research study provides detailed qualitative and quantitative analysis of the global Heat Exchanger Market. The market is further segmented and forecasted for major geographic regions, North America, Europe, Asia Pacific, and Rest of the World.

Some the prominent players in "Heat Exchangers Market" are:

Alfa Laval AB (Sweden)

GEA Group AG (Germany)

SPX Corporation (U.S.)

Xylem Inc. (U.S.)

Europe has always been a strong market for heat exchangers and globally, this market has been a leader for heat exchangers with respect to demand as well as production capacity. Heat exchanger consumption in the region is estimated to grow at a CAGR of around 4.81% from 2014 to 2019. This region has a relatively slow growth rate as a result of its dominant market size and slow economic activity as compared to the other regions.

Currently, Europe acquires more than 30.0% of the total global market. The region has huge installed plant capacities of heat exchanger and is an export based heat exchanger market. Also, large number of emerging manufacturers from Eastern Europe is expected to reduce import dependence of various countries which is further expected to drive the heat exchanger market in future.

Asia-Pacific, being the fastest growing heat exchangers market globally, is estimated to grow at a CAGR of 10.70% for the next five years. Asia-Pacific is witnessing high industrial growth rate, which hints at an ever-increasing demand of heat exchangers for its diverse applications.



China dominates the heat exchangers market in Asia-Pacific region, being a major consumer and the fastest growing country in terms of heat exchangers demand. Currently, a high share of heat exchanger is being consumed by the chemical industry and the demand of heat exchangers through chemical industry is projected to grow in the next five years at a CAGR of 14.32% from 2014 to 2019. After China, countries such as India, Japan and other Asian countries, are showing increasing growth in demand for heat exchangers.

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