

Rainscreen Cladding Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material (Composite Material, Metal, Fiber Cement, Ceramic, and Others), Application (Residential, Commercial, and Industrial), and Construction (New Construction and Renovation), By Region, By Competition Forecast and opportunities, 2018-2028F

<https://marketpublishers.com/r/R57B66B9C382EN.html>

Date: November 2023

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: R57B66B9C382EN

Abstracts

Global Pressure Vessels Market was valued at USD 37.10 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.26% through 2028.

Pressure vessels are engineered containers designed to safely store, contain, or transport pressurized fluids, gases, or substances under internal pressures significantly different from the ambient environment. These vessels are critical components in various industries, including manufacturing, petrochemicals, energy, and aerospace. Pressure vessels are built to withstand high internal pressures while ensuring the safety of personnel and the surrounding environment. They come in various shapes and sizes, including cylindrical, spherical, and more complex designs, depending on their intended use. The construction materials used in pressure vessels vary, with common choices being steel alloys, stainless steel, and composite materials. The selection of materials depends on factors such as the application's pressure and temperature requirements, corrosion resistance, and regulatory compliance. Pressure vessels are subject to rigorous design, manufacturing, inspection, and testing standards to ensure their structural integrity and reliability. They play a crucial role in processes involving the containment of pressurized substances, including the storage of compressed gases, the generation of steam for power generation, and chemical reactions at elevated

pressures. Proper design, maintenance, and adherence to safety standards are essential for the safe operation of pressure vessels in industrial settings.

Key Market Drivers

. Expanding Chemical Industry:

The global pressure vessels market is being driven by the expanding chemical industry. Pressure vessels play a critical role in chemical manufacturing processes, where they are used for various purposes such as storing and transporting chemicals, facilitating chemical reactions, and maintaining specific pressure and temperature conditions. With the increasing demand for chemicals for applications like pharmaceuticals, petrochemicals, and specialty chemicals, the need for pressure vessels continues to grow. Additionally, stringent safety regulations in the chemical sector necessitate the use of reliable and high-quality pressure vessels, further boosting market demand. As the chemical industry expands to meet global demand, the pressure vessels market is poised for substantial growth.

Growth in Energy and Power Generation:

The energy and power generation sector is a significant driver of the global pressure vessels market. Pressure vessels are essential components in power plants, both conventional and renewable, where they are used for steam generation, heat exchange, and energy storage. As the world shifts toward cleaner energy sources, there is a growing emphasis on renewable energy technologies such as solar thermal power plants and nuclear reactors, all of which rely on pressure vessels for efficient operation. Additionally, the expansion of natural gas and LNG infrastructure worldwide requires the use of pressure vessels for storage and transportation. The need for reliable and efficient pressure vessels to support these energy initiatives fuels market growth.

Advancements in Petrochemical Industry:

The petrochemical industry is a major driver of the global pressure vessels market. Pressure vessels are critical in the production of petrochemicals, including the refining and processing of crude oil and natural gas. As the petrochemical industry advances with new technologies and processes, the demand for specialized pressure vessels with higher capacities and improved materials grows. Moreover, the shale gas revolution has significantly increased the demand for pressure vessels in the United States and other regions involved in shale gas exploration and production. As the petrochemical industry

continues to innovate and expand its operations, the pressure vessels market experiences substantial growth.

Infrastructure Development in Emerging Economies:

Emerging economies are experiencing rapid infrastructure development, including the construction of power plants, refineries, and chemical processing facilities. This development requires a substantial investment in pressure vessels to support various industrial processes and applications. Pressure vessels are crucial for these emerging economies to meet their growing energy needs, achieve self-sufficiency in chemical production, and enhance their industrial capabilities. The urbanization and industrialization of these regions drive the demand for pressure vessels and provide a significant growth opportunity for manufacturers in the market.

Focus on Renewable Energy Projects:

The global focus on renewable energy projects, including solar thermal power plants and concentrated solar power (CSP) facilities, is driving the demand for pressure vessels. In CSP applications, pressure vessels are used to store and transfer high-temperature heat generated by solar collectors, enabling continuous power generation even when the sun is not shining. As countries strive to reduce their carbon footprint and transition to cleaner energy sources, the demand for pressure vessels in renewable energy projects is expected to rise. This driver aligns with global efforts to combat climate change and transition to sustainable energy solutions.

Increasing Adoption of Nuclear Power:

The increasing adoption of nuclear power as a clean and efficient energy source is another driver for the global pressure vessels market. Nuclear power plants rely on pressure vessels for containing and controlling nuclear reactions. As concerns about carbon emissions and climate change grow, nuclear power is gaining renewed attention as a low-emission energy source. This resurgence in nuclear energy projects worldwide is boosting the demand for pressure vessels designed to meet the stringent safety and performance requirements of the nuclear industry. As more countries invest in nuclear power to diversify their energy portfolios, the pressure vessels market is poised for substantial growth.

Government Policies are Likely to Propel the Market

Pressure Equipment Directive (PED) in the European Union:

The Pressure Equipment Directive (PED) is a comprehensive regulatory framework in the European Union (EU) that governs the design, manufacturing, and conformity assessment of pressure equipment, including pressure vessels. It sets out essential safety requirements for pressure vessels to ensure their safe operation. The PED mandates conformity assessment procedures, such as CE marking and third-party inspections, to verify compliance with safety standards. This directive promotes product safety and harmonization across the EU, facilitating the free movement of pressure vessels within the single market. The PED encourages innovation and competitiveness in the pressure vessels market by providing a clear regulatory framework that manufacturers must follow. It ensures that pressure vessels used in various industrial sectors, including energy, chemicals, and manufacturing, meet rigorous safety standards. Additionally, the PED promotes environmental protection and energy efficiency by addressing issues related to materials and energy consumption.

ASME Boiler and Pressure Vessel Code in the United States:

In the United States, the ASME Boiler and Pressure Vessel Code (BPVC) is a widely recognized set of standards and regulations governing the design, construction, and inspection of pressure vessels. The ASME BPVC is used as a basis for the design and fabrication of pressure vessels in various industries, including power generation, oil and gas, and petrochemicals. It provides comprehensive guidelines for ensuring the safety and reliability of pressure vessels. Government agencies, such as the Occupational Safety and Health Administration (OSHA), incorporate ASME standards into their regulations to ensure workplace safety. The ASME BPVC plays a crucial role in aligning industry practices with safety objectives and protecting workers and the environment. Government support for adherence to the ASME BPVC enhances public safety and confidence in the use of pressure vessels in critical applications.

China Pressure Vessel Safety Regulations:

China has implemented a set of regulations governing the safety of pressure vessels, known as the 'Pressure Vessel Safety Regulations.' These regulations establish safety requirements, inspection procedures, and quality control standards for the manufacturing, installation, and operation of pressure vessels within China. Compliance with these regulations is mandatory for manufacturers, operators, and users of pressure vessels in the country. The Chinese government places a strong emphasis on safety in industrial processes, and the Pressure Vessel Safety Regulations are a critical

component of ensuring the safe use of pressure vessels across various industries, including chemicals, energy, and manufacturing. The government conducts regular inspections and enforces compliance with these regulations to mitigate risks associated with pressure vessel operation.

API Standards for Pressure Vessels in the Oil and Gas Industry:

In the global oil and gas industry, pressure vessels play a pivotal role in various operations, from refining to petrochemical processes. The American Petroleum Institute (API) has developed a series of standards, such as API 510 and API 570, that govern the inspection, maintenance, and repair of pressure vessels used in the oil and gas sector. These standards are often incorporated into government regulations and industry best practices. Government policies in oil-producing countries frequently reference API standards to ensure the safe operation of pressure vessels within the sector. These policies require companies to comply with API standards during the design, fabrication, and maintenance of pressure vessels, thus contributing to the safety and environmental protection goals of the industry.

Pressure Systems Safety Regulations (PSSR) in the United Kingdom:

The United Kingdom's Pressure Systems Safety Regulations (PSSR) mandate safety measures and risk assessments for pressure systems, including pressure vessels. These regulations require periodic examinations and inspections of pressure systems to ensure their safety and integrity. PSSR also places responsibilities on duty holders and competent persons to assess, control, and mitigate risks associated with pressure vessels. The UK government's commitment to safety through regulations like PSSR reflects its dedication to protecting workers, the public, and the environment. These regulations promote best practices in the design, operation, and maintenance of pressure vessels across various industries, contributing to overall safety and risk reduction.

Japanese High-Pressure Gas Safety Act:

Japan's High-Pressure Gas Safety Act establishes safety standards and regulations for high-pressure gas equipment, including pressure vessels. This act ensures the safe handling and operation of high-pressure gas systems, promoting public safety and environmental protection. Compliance with the act's requirements, including periodic inspections and quality control measures, is mandatory for manufacturers and operators of high-pressure gas equipment, including pressure vessels. The Japanese

government's commitment to regulating high-pressure gas equipment aligns with its goal of ensuring the safety of its citizens and the environment. By enforcing these regulations, the government contributes to the safe and reliable use of pressure vessels in various industrial applications within Japan.

Key Market Challenges

Stringent Regulatory Compliance:

One of the significant challenges faced by the global pressure vessels market is the complexity and stringency of regulatory compliance. Pressure vessels are critical components used in various industries, including energy, chemical, and manufacturing sectors. To ensure public safety, environmental protection, and reliable operation, governments and industry bodies worldwide have established rigorous regulations and standards governing the design, manufacturing, installation, operation, and maintenance of pressure vessels. Meeting these regulatory requirements demands considerable resources, expertise, and time from manufacturers and operators. Different regions and industries often have distinct regulations, making it challenging for companies with global operations to navigate the complex landscape. Failure to comply with regulations can result in severe consequences, including safety risks, legal liabilities, fines, and reputational damage. Additionally, staying up-to-date with evolving regulations and ensuring consistent compliance across various jurisdictions poses an ongoing challenge. The constant need for monitoring and adapting to changes in regulations adds complexity to the pressure vessels market. As technologies advance and new industry challenges arise, pressure vessel manufacturers and users must continually adapt to stay compliant, which can impact operational efficiency and add to the overall cost of doing business.

Technological Advancements and Material Innovation

While technological advancements and material innovation drive progress in various industries, they also present challenges to the global pressure vessels market. As industries evolve, they demand pressure vessels that can withstand higher pressures, temperatures, and corrosive environments. This requires the development of new materials, manufacturing techniques, and testing methodologies to ensure the safety and reliability of pressure vessels under these extreme conditions. However, integrating new materials and technologies into pressure vessel design is a complex process. The compatibility of materials with specific applications, as well as their long-term durability and reliability, must be thoroughly evaluated. Rigorous testing and validation are

necessary to ensure that new pressure vessel designs meet regulatory standards and industry best practices. Moreover, material innovation can result in increased costs, especially during the initial stages of adoption. The research, development, and testing of new materials can be time-consuming and costly, impacting the overall cost structure of pressure vessel manufacturing. Additionally, the validation process may require extensive testing over extended periods to ensure the materials' long-term performance and safety, which can further delay commercialization. Balancing the demands for higher performance, efficiency, and safety with the challenges of integrating new materials and technologies is a persistent challenge in the pressure vessels market. Manufacturers must strike a delicate balance between innovation and adherence to established regulatory and safety standards to ensure that pressure vessels meet industry requirements while delivering superior performance and reliability.

Segmental Insights

Boiler Insights

The Boiler segment had the largest market share in 2022 and is expected to dominate the market during the forecast period. Boilers play a pivotal role in the global energy landscape, contributing significantly to electricity generation and heating. They are commonly used in power plants, both fossil fuel-based and renewable, where they are integral to steam turbine systems. In fossil fuel power plants, boilers burn coal, natural gas, or oil to generate steam, which drives turbines to produce electricity. In renewable energy facilities like biomass and concentrated solar power plants, boilers are used to produce steam from sustainable sources. The reliable operation of boilers is crucial for efficient energy production. Boilers find applications in various industries beyond power generation, including manufacturing, chemical processing, and food and beverage production. In manufacturing, boilers provide process heat for various operations, such as drying, sterilizing, and heating chemicals. The chemical industry relies on boilers for reaction processes and the production of steam for various applications. In the food industry, boilers are used for cooking, pasteurization, and sterilization, ensuring product safety and quality. The versatility of boilers makes them indispensable components in a wide range of industrial processes. Environmental concerns and regulations have a significant impact on the global pressure vessels market, particularly with respect to boilers. Emissions from boiler combustion processes, such as carbon dioxide (CO₂), sulfur dioxide (SO₂), and nitrogen oxides (NO_x), are subject to strict regulatory limits in many countries. To address these concerns, manufacturers and operators of boilers are adopting cleaner technologies, such as low-NO_x burners and advanced control systems, to reduce emissions and improve overall. Technological advancements play a

crucial role in the evolution of boilers. Continuous research and development efforts focus on enhancing boiler efficiency, reducing emissions, and improving safety. Advanced materials and manufacturing techniques are employed to create more durable and heat-resistant boiler components, increasing their lifespan and reliability. Additionally, digitalization and data analytics are being integrated into boiler control systems to optimize performance, predict maintenance needs, and enhance safety. The pursuit of energy efficiency and sustainability is driving innovation in the boiler segment of the pressure vessels market. Boiler manufacturers are developing high-efficiency models that minimize energy consumption and reduce greenhouse gas emissions. Sustainable fuel sources, such as biomass and biogas, are gaining traction as alternatives to fossil fuels, further aligning boilers with environmental goals. Combined heat and power (CHP) systems, which simultaneously generate electricity and useful heat from a single energy source, are becoming more prevalent, contributing to energy efficiency and sustainability objectives.

Steel Alloys Insights

The steel alloys segment had the largest market share in 2022 and is expected to dominate the market during the forecast period. The selection of steel alloys for pressure vessel construction is a critical decision that impacts vessel performance and longevity. The choice of alloy composition depends on various factors, including the specific application, operating conditions, and regulatory requirements. Commonly used steel alloys for pressure vessels include carbon steel, stainless steel, and low-alloy steel.

Pressure vessel manufacturers must adhere to stringent regulatory standards and codes when selecting and using steel alloys. Regulatory bodies, such as the American Society of Mechanical Engineers (ASME) and the European Pressure Equipment Directive (PED), provide guidelines and certification requirements for pressure vessel materials. Manufacturers are required to demonstrate that the chosen steel alloys meet specified safety and quality standards. Material certification processes involve rigorous testing and documentation to verify the chemical composition, mechanical properties, and heat treatment of the steel alloys. Material certificates provide assurance to regulators, customers, and end-users that the pressure vessels are constructed using approved materials that comply with industry standards. The certification process adds complexity to the manufacturing process but is essential for ensuring the safety and reliability of pressure vessels.

Regional Insights

Asia Pacific is the largest market for pressure vessels in 2022. The growth of the market in Asia Pacific is attributed to the rising demand for pressure vessels in China and India. China is the largest market for pressure vessels in Asia Pacific, followed by India. The growth of the market in China is attributed to the growing demand for pressure vessels in the oil and gas, chemical, and power industries. The growth of the market in India is attributed to the growing demand for pressure vessels in the infrastructure and manufacturing industries.

North America is the second largest market for pressure vessels in 2022. The growth of the market in North America is attributed to the rising demand for pressure vessels in the United States and Canada. The United States is the largest market for pressure vessels in North America, followed by Canada. The growth of the market in the United States is attributed to the growing demand for pressure vessels in the oil and gas, chemical, and power industries. The growth of the market in Canada is attributed to the growing demand for pressure vessels in the oil and gas and mining industries.

Key Market Players

Alfa Laval AB

Chart Industries, Inc.

SPX Flow Inc

Metso Outotec

IMI Precision Engineering

Cameron International Corporation

Nooter/Eriksen, Inc.

Hitachi Zosen Corporation

The Weir Group

Ebara Corporation

Report Scope:

In this report, the Global Pressure Vessels Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Pressure Vessels Market, By Type:

Boiler

Reactor

Separator

Pressure Vessels Market, By Material Type:

Steel Alloys

Composites

Pressure Vessels Market, By Application:

Storage vessels

Processing Vessels

Pressure Vessels Market, By Heat Source:

Fired

Un-fired

Pressure Vessels Market, By End User

Power

Oil & Gas

Food & Beverages

Pharmaceuticals

Chemicals

Pressure Vessels Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Pressure Vessels market.

Available Customizations:

Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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