

Power Generation Equipment Market By Type (Turbine and Engines, Generators, Others), By Application (Utility, Industrial, Commercial, Residential): Global Opportunity Analysis and Industry Forecast, 2022 - 2032

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Abstracts

The global power generation equipment market was valued at \$110.4 billion in 2022, and is projected to reach \$173.1 billion by 2032, growing at a CAGR of 4.8% from 2023 to 2032.

Power generation equipment refers to machinery, devices, and systems designed to generate electrical power. These tools are crucial components in electricity production, essential for various applications in homes, industries, and other sectors. Power generation equipment encompasses a wide range of technologies, each with its specific mechanisms for converting various forms of energy into electrical power.

Generators are fundamental components in power generation systems. They convert mechanical energy into electrical energy through electromagnetic induction. Generators consist of a rotor and a stator with the former connected to a prime mover such as a turbine or an engine. As the rotor spins, it induces a flow of electrons in the coils of the stator producing electrical power. Generators are used in various applications, ranging from large-scale power plants to portable generators for emergency backup.

Moreover, turbines are key components in many power generation systems, particularly those harnessing the energy from water, steam, or gas. Steam turbines are commonly utilized in thermal power plants where heat is used to produce steam. Hydroelectric power plants utilize water turbines to convert the kinetic energy of flowing water into mechanical energy, driving the generator to produce electricity. In addition, gas turbines

are prevalent in gas-fired power plants, operate by compressing air, mixing it with fuel, and igniting the mixture to drive the turbine.

Rise of renewable energy sources such as solar and wind drives technological advancements in power generation. Innovations in solar panel efficiency, wind turbine design, and energy storage systems have transformed these technologies into viable and competitive alternatives to conventional power sources. The demand for power generation equipment capable of harnessing and integrating these renewable sources into the energy grid has surged, helping to reflect a global shift toward more sustainable and environmentally friendly energy solutions. In addition, smart grid technologies have played a pivotal role in shaping the power generation landscape. Smart grids leverage advanced communication and control systems to optimize the generation, distribution, and consumption of electricity. This requires sophisticated power generation equipment that seamlessly integrates with these intelligent grids that allows real-time monitoring, predictive maintenance, and efficient load balancing. All these factors drive the demand for the power generation equipment market during the forecast period.

However, high initial costs and capital intensity pose significant challenges to the growth of the power generation equipment market. The substantial upfront investment required for acquiring and installing such equipment becomes a major impediment to expansion and development. Moreover, the long installation periods associated with power projects amplify the impact of high initial costs. The time it takes from the conceptualization of a power generation project to its operational phase is extensive, during which the invested capital remains tied up without generating returns. All these factors hamper the power generation equipment market growth.

The integration of energy storage enables the development of microgrids, and it is also used to store excess energy during periods of high renewable energy generation. In addition, it helps to release energy when demand is high or during periods of low renewable energy availability. This capability enhances grid stability and reliability by balancing supply and demand in real-time that reduce the need for backup power plants that rely on fossil fuels. As a result, power generation equipment operates more efficiently, leading to cost savings and a reduction in greenhouse gas emissions. All these factors are anticipated to offer new growth opportunities for the power generation equipment market during the forecast period.

The power generation equipment market is segmented on the basis of type, application, and region. On the basis of type, the market is divided into turbine and engines, generators, and others. Turbine and engines segment accounted for less than three-

fifths of global power generation equipment market share in 2022 and is expected to maintain its dominance during the forecast period. Advancements in technology in the field of turbine and engine design have significantly improved their efficiency, reliability, and performance. Innovations such as combined cycle power plants, advanced gas turbines, and high-efficiency diesel engines have enabled power generation equipment to operate more efficiently, thereby reducing fuel consumption, emissions, and operating costs. These technological advancements drive the adoption of turbines and engines, especially among utilities and independent power producers seeking to enhance their operational efficiency and competitiveness.

On the basis of application, the market is segmented into utility, industrial, commercial, and residential. The utility segment accounted for more than two-fifths of global power generation equipment market share in 2022 and is expected to maintain its dominance during the forecast period. The increase in focus on energy security and resilience drives the investments in utility applications in the power generation equipment market. Events such as natural disasters, cyber-attacks, and geopolitical tensions highlight the importance of resilient utility infrastructure capable of withstanding disruptions and ensuring uninterrupted electricity supply. As a result, utility companies are investing in diverse and distributed generation assets, grid modernization, and microgrid solutions to enhance the resilience and reliability of their power generation infrastructure.

Region-wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA. Asia-Pacific accounted for less than half of the global power generation equipment market share in 2022 and is expected to maintain its dominance during the forecast period. Technological advancements and innovations in power generation equipment play a pivotal role in market expansion. The Asia-Pacific region is witnessing rapid advancements in power generation technologies, including advanced gas turbines, combined cycle power plants, ultra-supercritical coal-fired power plants, and energy storage systems. These innovations are aimed at enhancing energy efficiency, reducing emissions, and ensuring grid stability, thereby catering to the evolving energy landscape of the region.

Key players in the power generation equipment market include ABB, Bharat Heavy Electricals Limited (BHEL), Caterpillar, Cummins Inc., General Electric, MITSUBISHI HEAVY INDUSTRIES, LTD., Schneider Electric, Siemens Energy, Toshiba Energy Systems & Solutions Corporation, and Wartsila.

Apart from these major players, there are other key players in the power generation equipment market. These include Alstom, Andritz AG, Babcock & Wilcox Enterprises,

Doosan Heavy Industries & Construction, Emerson Electric Co., Harbin Electric Company Limited, Honeywell International Inc., Kawasaki Heavy Industries, MAN Energy Solutions, Rolls-Royce Holdings plc, Shanghai Electric Group Company, Sumitomo Heavy Industries, and Voith Group.

Key findings of the study

On the basis of type, the turbines and engines segment is anticipated to grow at the fastest CAGR of 4.9% during the forecast period.

By application, the utility segment is anticipated to grow at the fastest CAGR during the forecast period.

Region-wise, Asia-Pacific has the highest share in 2022 in terms of revenue.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the power generation equipment market analysis from 2022 to 2032 to identify the prevailing power generation equipment market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the power generation equipment market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global power generation equipment market trends, key players, market segments, application areas, and market growth strategies.

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Analysis of raw material in a product (by %)

Installed Base analysis

Product Life Cycles

Supply Chain Analysis & Vendor Margins

Upcoming/New Entrant by Regions

Technology Trend Analysis

Market share analysis of players by products/segments

New Product Development/ Product Matrix of Key Players

Regulatory Guidelines

Additional company profiles with specific to client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

Import Export Analysis/Data

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

SWOT Analysis

Key Market Segments By Type Turbine and Engines

Generators

Others

By Application Utility

Industrial

Commercial

Residential

By Region

North America U.S.

Canada

Mexico

Europe Germany

France

Italy

Spain

UK

Rest of Europe

Asia-Pacific China

India

Japan

South Korea

Australia

Rest of Asia-Pacific

LAMEA Brazil

South Africa,

Saudi Arabia

Rest of LAMEA

Key Market Players

ABB

Bharat Heavy Electricals Limited

Caterpillar

Cummins Inc.

General Electric

Mitsubishi Heavy Industries, Ltd.

Schneider Electric

Siemens Energy

Toshiba Energy Systems & Solutions Corporation

Wartsila

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