

Global Single-shaft Centrifugal Compressor Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Single-shaft Centrifugal Compressor competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In this report, the term “single-shaft centrifugal compressor” refers to a process-duty centrifugal compressor in which one or more impellers are arranged on the same shaft, supported by bearings at both ends, and operating at a single rotational speed. Its core characteristic is that it does ****not**** use an internal multi-pinion bull gear, split-shaft, multi-speed configuration, but instead achieves aerodynamic compression with a single rotor running at one speed; this is what distinguishes it from “integrally-gearred centrifugal compressors (Integrally-Geared Compressors, IGC).” In terms of casing and assembly configuration, single-shaft trains can be axially/horizontally split or radially/vertically split (the latter commonly called “barrel” type); in terms of staging, they can be single-stage (typically for pipeline station duties with low–medium pressure ratios and very large flow rates) or multi-stage (with back-to-back or in-line arrangements to optimize axial thrust and overall pressure ratio). At the system level, a compliant process-duty single-shaft centrifugal compressor is normally furnished with a complete set of auxiliary systems such as a dry gas seal (DGS) system, lube/seal oil system, and mechanical protection system: the design and support systems for the dry gas seal meet at least the minimum requirements of API 692; the lube, shaft sealing, and control oil systems comply with API 614; monitoring and interlocking functions for critical vibration, axial displacement, speed, overspeed/surge, and key temperatures comply with API 670; and type and acceptance tests for the overall aerodynamic performance of the machine are typically conducted in accordance with ASME PTC 10. Application industries cover continuous process services in oil refining, chemicals, and natural gas, as well as high-reliability duties such as long-distance pipelines,

underground gas storage, CCUS/CO₂ compression, hydrogen/blended hydrogen, and olefin chains (including electric-drive zero-emission solutions and constrained offshore/subsea environments). In terms of standard boundaries, the API 617/ISO 10439 series specifies the minimum design and test requirements for process axial and centrifugal compressors, with ISO 10439-2 providing detailed provisions for “non-integrally geared (Non-IG) centrifugal and axial compressors”; at the same time, ISO 10439/API 617 also emphasizes that this family of standards does not apply to fans and blowers with pressure rises below approximately 35 kPa (which fall into a different equipment category). By contrast, integrally geared centrifugal compressors (IGC)—whose typical structure is a central bull gear with several pinions, overhung impellers on both ends of each pinion shaft, different rotational speeds for each stage, and possible interstage cooling—are specified separately in ISO 10442 and API 672 as “packaged centrifugal air compressors,” serving mainly air/clean-gas compression duties, and are strictly distinguished in scope from the single-shaft process machines covered in this report. It should be noted that integrated, hermetically sealed electric-drive compressors (IMC/ICL/HOFIM, etc.) which use a single rotor at one speed without internal gearing, and house the motor and compressor within a pressurized casing (typically with active magnetic bearings and without conventional oil systems and DGS), are still included in the “single-shaft centrifugal compressor” category of this report; however, they offer differentiated advantages in terms of system boundaries, leakage control, and operation and maintenance model (near-zero emissions, smaller footprint, and higher availability), and will be discussed separately in the product segmentation section later in the report. The above definitions and boundaries are based on API 617/ISO 10439-2, supplemented by ASME PTC 10 for performance test scope and by API 692/614/670 for the definition of sealing, lubrication, and protection systems; the structural features and applications of IGCs refer to publicly available technical materials and engineering literature from multiple major OEMs. To ensure data comparability, the market statistical scope and measurement conventions of this report are defined as follows: (1) Scope of equipment counted: included are new shipments (“Shipments”) and installed base (“Installed Base”) of process-duty single-shaft centrifugal compressors, covering both single-stage and multi-stage machines, axially/horizontally split and radially/vertically split configurations, and mainstream driver types such as electric motors, gas turbines, and steam turbines; included are single-stage pipeline compressors and low head-per-stage schemes for long-distance transmission pipelines and hub stations, as long as they are non-integrally geared centrifugal machines with a single rotor at one speed; included are units employing integrated hermetically sealed electric drives (ICL/HOFIM, etc.) that satisfy the non-integrally geared and process-duty conditions (counted under the “single-shaft electric-drive zero-emission” subcategory). (2) Exclusions: integrally geared centrifugal

compressors (IGC), which are covered by ISO 10442/API 672 as “packaged centrifugal air compressors,” are not included in the scope of this report; positive displacement compressors (reciprocating, screw, etc.) and axial compressors are excluded (reciprocating compressors may refer to ISO 13631); equipment such as fans and blowers with pressure rises below approximately 35 kPa is excluded (outside the scope of ISO 10439). (3) Units and levels of measurement: sales volume is by default expressed in “packages” (units/Packages), for technology comparison and installed-base statistics; revenue is by default expressed per package as well, corresponding to customer procurement and project financial dimensions (including the driver and major auxiliaries, with the auxiliary boundary varying according to standards and contract definitions; based on the minimum configurations defined by API 614/692/670, this report will provide an “included/excluded” mapping table to avoid double counting or omissions). The above choices of statistical scope and measurement are based on, and annotated by, the definition of process compressors in API 617/ISO 10439-2, the dedicated scope for IGCs in ISO 10442/API 672, the performance test scope in ASME PTC 10, the boundary for reciprocating compressors in ISO 13631, and the coverage description of HTS/HS 8414.80. As a key equipment for gas compression and transportation in industrial production, the technical iteration and application expansion of single-shaft centrifugal compressors have always kept up with the core needs of industrial development, and multiple driving forces jointly promote their continuous progress. The large-scale development of the energy and chemical industry is the primary driving factor. With the continuous emergence of large-scale refining and chemical, natural gas processing and other projects, higher requirements have been put forward for the processing capacity and operation stability of gas compression equipment. Single-shaft centrifugal compressors, with the characteristics of relatively simple structure and high efficiency per unit flow, can adapt to the continuous production needs of large-scale devices and become an important choice for such scenarios. At the same time, the deepening of energy conservation and environmental protection policies has pointed out the direction for its technological upgrading. The limitations of traditional compressors in terms of energy consumption and emissions have gradually become prominent, and the market demand for compressors with low energy consumption and low noise is increasing. This has prompted enterprises to improve equipment energy efficiency by optimizing impeller design and improving sealing technology, thereby reducing energy consumption and environmental impact during operation. In addition, the improvement of industrial automation level has also provided support for the development of single-shaft centrifugal compressors. The integrated application of intelligent control systems enables the equipment to realize real-time monitoring and precise regulation of operating parameters, which not only improves the convenience of operation, but also can reduce downtime by predicting

faults, further ensuring the smoothness of the production process. Despite the significant application advantages of single-shaft centrifugal compressors, their development and application still face many challenges that need to be overcome. Insufficient adaptability to variable working conditions is a prominent problem. In industrial production, parameters such as gas flow and pressure often change due to process adjustments. However, the characteristic curve of single-shaft centrifugal compressors is relatively steep. When operating deviating from the design conditions, it is prone to risks such as a sharp drop in efficiency and surge. How to broaden its stable operation range through technical improvements has become the key to adapting to complex production scenarios. The balance between equipment reliability and maintenance costs cannot be ignored either. Core components of large compressors, such as impellers and bearings, are prone to wear and fatigue under long-term high-speed operation. Although the use of high-strength materials can improve the service life of components, it will significantly increase the manufacturing cost. If conventional materials are selected to control costs, it may lead to increased maintenance frequency and affect production continuity. In addition, the degree of autonomy of high-end technologies and core components needs to be improved. In some scenarios of high-parameter and special medium compression, some key components still rely on imports, which not only increases the cost of equipment procurement and maintenance, but also may be affected by supply chain fluctuations, restricting their independent application and development in the high-end industrial field.

The global Single-shaft Centrifugal Compressor market size was estimated at USD 1574.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of -3.90% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Single-shaft Centrifugal Compressor market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Single-shaft Centrifugal Compressor market. It offers detailed profiles of major players,

including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Single-shaft Centrifugal Compressor market.

Global Single-shaft Centrifugal Compressor Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Siemens Energy

Solar Turbines

MHI Compressor (MCO)

Everllence (MAN Energy Solutions)

HMS Group

Atlas Copco

Baker Hughes

Shaanxi Blower (Group) Co., Ltd.

Chart Industries (Howden Turbo)

Shengu Group

Kobelco

Ebara Elliott Energy (EEE)

GPE Turbo

Kawasaki Heavy Industries (KHI)

Market Segmentation (by Type)

Horizontal Segmentation

Vertical Segmentation

Single-Stage Pipeline

Other

Market Segmentation (by Application)

Oil and Gas Gathering and Pipeline Transportation

LNG

Oil Refining

Petrochemicals

Fertilizers and Syngas

Hydrogen and CCUS

Industrial Gases and Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Single-shaft Centrifugal Compressor Market

Overview of the regional outlook of the Single-shaft Centrifugal Compressor Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Single-shaft Centrifugal Compressor Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential

of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Single-shaft Centrifugal Compressor, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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