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Global 300-700MW Steam Turbine Generator Rotor Forging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 300-700MW Steam Turbine Generator Rotor Forging market size is expected to reach $ 537 million by 2032, rising at a market growth of 14.6% CAGR during the forecast period (2026-2032).

300-700MW steam turbine generator rotor forging refers to a rotor forging integrally formed from high-purity alloy steel ingots via open-die forging, specifically designed for subcritical, supercritical and some ultra-supercritical thermal power units in the power range of 300MW to 700MW, including steam turbine rotor bodies and generator rotors. Operating speeds are 1500 r/min (half-speed) or 3000 r/min (full speed), with service temperatures of 400–565°C, and rotor weights approximately 30–80 tons. These rotor forgings are the preferred core components for coal?power unit replacement, flexibility retrofits and overseas conventional thermal power markets, and serve as the standardised, high?turnover flagship product range for large casting & forging manufacturers worldwide. The industrial significance lies in the fact that the 300-700MW range represents the largest installed capacity, the greatest number of existing units, and the most active segment for new coal?fired projects, making its rotor forgings a critical determinant of safety, economy and service life for this class of units. The supply-demand dynamics of this segment reflect the backbone of the global coal?fired power equipment industry and serve as a key benchmark for a nation’s heavy forging capability – from “able to make” to “stable batch supply”.

300-700MW steam turbine generator rotor forgings represent the largest installed base and most active replacement segment in thermal power equipment. A complete set of rotor forgings (HP?IP, LP and generator rotors) typically costs USD 2–4 million, depending on material grade (conventional Cr?Mo?V vs. FB2) and supplier

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qualification. Japan Steel Works, with its extreme manufacturing capability and long?standing dominance in nuclear and thermal rotors, commands gross margins exceeding 40%. China First Heavy Industries and Sinomach Heavy have raised their margins to 25–35% through domestic breakthroughs in FB2 rotors and monoblock LP rotors for nuclear units, while newer entrants like Taiyuan Heavy struggle with margins below 20% due to long certification cycles and capacity ramp?up. Downstream demand is driven by three forces: new plant construction in emerging markets (SE Asia, Africa, Middle East) where 300?700MW units remain the sweet spot; a wave of life?extension replacements in China, where hundreds of 300?600MW units installed between 1995?2010 are reaching 25?30 years of service; and flexibility retrofits of existing units to accommodate high shares of renewable energy, which often require rotor upgrades. In the competitive landscape, Japan Steel Works remains the global pricing and process benchmark, while China First Heavy Industries and Sinomach Heavy, with their batch FB2 supply capability and nuclear forging experience, are gradually eating into its mid?range market share. Doosan Enerbility stays competitive in Korea and selected export markets; Indian players such as Bharat Forge compete on price in low?end Middle East and African markets. Uncertainties include long?term policy pressures on new coal?fired power projects, although replacement and flexibility retrofits will sustain demand for 5?10 years; and the challenge of developing next?generation heat?resistant steels for >620°C units – if domestic R&D lags, the high?end segment may remain dependent on Japan Steel Works. Conclusion: The 300?700MW steam turbine generator rotor forging market is a stable segment propelled by three drivers – capacity expansion in developing regions, replacement of ageing units (led by China’s large installed base), and flexibility upgrades. In the medium term, it benefits from China’s massive replacement wave; in the long term, it faces headwinds from global coal?phase?down policies. Domestic breakthroughs in high?end FB2 and above rotors have been achieved, but fully substituting Japan Steel Works will still take years of operational validation.

This report studies the global 300-700MW Steam Turbine Generator Rotor Forging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 300-700MW Steam Turbine Generator Rotor Forging and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 300-700MW Steam Turbine Generator Rotor Forging that contribute to its increasing demand across many markets.

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Highlights and key features of the study
Global 300-700MW Steam Turbine Generator Rotor Forging total production and demand, 2021-2032, (Units)
Global 300-700MW Steam Turbine Generator Rotor Forging total production value, 2021-2032, (USD Million)
Global 300-700MW Steam Turbine Generator Rotor Forging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global 300-700MW Steam Turbine Generator Rotor Forging consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: 300-700MW Steam Turbine Generator Rotor Forging domestic production, consumption, key domestic manufacturers and share
Global 300-700MW Steam Turbine Generator Rotor Forging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global 300-700MW Steam Turbine Generator Rotor Forging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global 300-700MW Steam Turbine Generator Rotor Forging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global 300-700MW Steam Turbine Generator Rotor Forging market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Japan Steel Works, Doosan Enerbility, China First Heavy Industries, Sinomach Heavy Equipment Group, Taiyuan Heavy Industry, Bharat Forge, Larsen & Toubro, Japan Casting & Forging, Shanghai Electric (SCF), Dongfang Electric, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 300-700MW Steam Turbine Generator Rotor Forging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by

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manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 300-700MW Steam Turbine Generator Rotor Forging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 300-700MW Steam Turbine Generator Rotor Forging Market, Segmentation by Type:

HP?IP Combined Rotor

LP Rotor

Generator Rotor

Global 300-700MW Steam Turbine Generator Rotor Forging Market, Segmentation by Material System:

Conventional Cr?Mo?V (?566°C)

FB2 (9Cr Martensitic, 620°C)

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Nickel?Based / Advanced

Global 300-700MW Steam Turbine Generator Rotor Forging Market, Segmentation by Application:

New Plant Construction (Capacity Expansion)

Aged Unit Replacement (Life Extension)

Performance Upgrade (Efficiency/Flexibility)

Others

Companies Profiled:

Japan Steel Works

Doosan Enerbility

China First Heavy Industries

Sinomach Heavy Equipment Group

Taiyuan Heavy Industry

Bharat Forge

Larsen & Toubro

Japan Casting & Forging

Shanghai Electric (SCF)

Dongfang Electric

Kobe Steel

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ATI

Scot Forge

Bruck GmbH

Siempelkamp Giesserei

Key Questions Answered:
1. How big is the global 300-700MW Steam Turbine Generator Rotor Forging market?
2. What is the demand of the global 300-700MW Steam Turbine Generator Rotor Forging market?
3. What is the year over year growth of the global 300-700MW Steam Turbine Generator Rotor Forging market?
4. What is the production and production value of the global 300-700MW Steam Turbine Generator Rotor Forging market?
5. Who are the key producers in the global 300-700MW Steam Turbine Generator Rotor Forging market?
6. What are the growth factors driving the market demand?

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