

Global Hydraulic Turbine Main Inlet Spherical Valve Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Hydraulic Turbine Main Inlet Spherical Valve market size was valued at US\$ 347 million in 2025 and is forecast to a readjusted size of US\$ 565 million by 2032 with a CAGR of 7.0% during review period.

A hydraulic turbine main inlet spherical valve is a large, high-pressure shut-off device installed between the downstream end of a hydropower plant penstock and the inlet of a hydraulic turbine or reversible pump-turbine. It is used to control the opening and closing of the main water passage and to provide safe isolation of the generating unit, making it a critical safety component of the turbine water conveyance system. Its core structure consists of a spherical obturator that rotates around the valve shaft. When fully open, the flow passage is aligned with the penstock to minimize hydraulic resistance and head loss. When closed, the obturator rotates to the shut-off position and works together with the sealing system to stop the water flow reliably, thereby isolating the turbine from the upstream pressurized water system. The valve mainly performs normal shutdown isolation, maintenance water isolation, and emergency shut-off under abnormal operating conditions. A complete system typically consists of the valve body, spherical obturator, valve shaft, service seal, maintenance seal, oil-hydraulic or water-hydraulic servomotors, locking devices, bypass and pressure-equalization piping, control cabinet, valve position monitoring devices, and safety interlock systems. The product is highly project-specific, with its design determined by parameters such as nominal diameter, design pressure, hydraulic head, transient hydraulic pressure, flow rate, turbine type, opening and closing time, sealing configuration, and actuation method. It is mainly used in high-head conventional hydropower plants and pumped-storage hydropower plants, particularly for Pelton turbines, high-head Francis turbines,

and reversible pump-turbines.

Key Findings

The global average selling price was approximately US\$1.9–2.3 million per unit in 2025.

The industry's overall gross margin was approximately 25%–32% in 2025.

Large and extra-large diameter spherical valves remained the main product types.

Pumped-storage hydropower plants were the fastest-growing downstream application.

Asia-Pacific remained the leading region for new-build demand.

The global core manufacturing base comprised 20 supplier groups.

Extra-large diameter and high-pressure products occupied the premium price segment.

China accounted for approximately 64% of global newly commissioned pumped-storage capacity in 2025.

Market Trends

Product development is moving toward larger diameters, higher pressure ratings, improved double-sealing configurations and more reliable emergency-closing performance. Manufacturers are also increasing the integration of hydraulic actuation, bypass systems, valve-position monitoring, condition monitoring and plant control interfaces. These changes are raising the engineering content of each delivery and widening the value difference between standard medium-sized valves and customized equipment for high-head pumped-storage plants.

Localization is becoming more important as project owners seek shorter delivery times,

domestic supply security and lower transportation risk for components that may weigh several hundred tonnes. At the same time, the market is not becoming fully standardized. Hydraulic transient conditions, plant layout, maintenance philosophy and transport limitations still require project-specific structural design, manufacturing procedures and factory testing. Leading manufacturers can supply spherical valves with diameters of more than three metres and design pressures extending into ultra-high-pressure ranges, demonstrating the specialized nature of the market.

Market Dynamics

The market has a project-driven and relatively uneven revenue profile. A limited number of large pumped-storage or high-head hydropower projects can materially affect annual order intake, production loading and revenue recognition. Contract revenue may be recognized across engineering, procurement, manufacturing, factory acceptance, shipment and on-site commissioning milestones, meaning annual market revenue does not correspond directly to the capacity of hydropower plants commissioned in the same year.

Competition is shaped by both integrated hydropower equipment groups and specialized valve manufacturers. Integrated suppliers benefit from turbine-package relationships and system-level engineering capability, while specialist manufacturers compete through pressure-rating expertise, customized valve design, flexible production and replacement-market experience. Procurement decisions are therefore influenced by lifecycle reliability, hydraulic safety and execution capability rather than equipment price alone.

Drivers

The principal market driver is the expansion of pumped-storage hydropower as power systems require more large-scale flexibility, peak regulation, frequency support and renewable-energy balancing capacity. Global hydropower additions reached 28 GW in 2025, including a record 11.7 GW of pumped storage, while more than 200 GW of pumped-storage capacity was operating worldwide and approximately 243 GW was under construction. This project base supports sustained demand for pump-turbine inlet valves and associated hydraulic systems.

A second driver is the modernization of aging hydropower assets. Main inlet spherical

valves are safety-critical isolation devices, and extended service life can increase the need for replacement of sealing systems, servomotors, bypass equipment, control systems or complete valve assemblies. Modernization demand is particularly relevant in mature hydropower markets where new plant construction is limited but the installed base is large.

Restraints

Long project approval cycles, large initial investment requirements and delays in civil construction can postpone equipment orders and revenue recognition. Main inlet spherical valves also have long operating lives, which limits recurring replacement frequency. In lower-pressure and lower-head applications, butterfly valves may offer a more economical alternative, restricting spherical valve penetration outside high-pressure operating environments.

The market also faces limited disclosure of standalone valve contract values. Spherical valves are frequently procured within broader turbine-generator or electromechanical packages, which reduces price transparency and makes direct comparison between projects difficult. High customization further limits economies of scale and prevents manufacturers from using fully standardized production processes.

Opportunities

The most visible opportunity is the continued build-out of high-head pumped-storage plants in Asia-Pacific. Larger reversible pump-turbine units require high-reliability isolation systems capable of bidirectional flow and repeated operating cycles. Demand is also emerging from pumped-storage projects in Europe, the Americas and selected developing markets as electricity systems increase their use of variable renewable generation.

Modernization represents a second opportunity. Complete valve replacement, double-seal upgrades, hydraulic actuator renewal, control-system digitization and online condition monitoring can create substantial equipment revenue without requiring construction of an entirely new hydropower plant. Suppliers with strong field engineering, dimensional reconstruction and outage-management capabilities are well positioned in this segment.

Challenges

The principal technical challenge is ensuring reliable operation under high static pressure, transient pressure rise, bidirectional flow and emergency-closing conditions. Valve bodies, shafts, seals, servomotors and locking systems must maintain structural integrity and sealing performance throughout long service periods. Failures can affect plant safety and availability, resulting in strict qualification, inspection and factory-testing requirements.

Manufacturing is also constrained by access to large castings, forgings, heavy welding, precision machining, non-destructive testing and high-pressure test facilities. Extra-large products create transportation and site-assembly challenges, while project delays can occupy working capital and production space for extended periods. Manufacturers must therefore manage engineering risk, supply-chain coordination and project cash flow simultaneously.

Industry Chain Analysis

The upstream industry consists of large steel castings and forgings, heavy steel plate, stainless and wear-resistant sealing materials, hydraulic cylinders, pumps, accumulators, control valves, sensors, electrical control components and industrial coatings. Large valve bodies and shafts require qualified metallurgy, heat treatment and non-destructive inspection, making upstream supplier capability a significant determinant of delivery schedule and product reliability.

Midstream activities include hydraulic calculation, transient analysis, structural design, welding, machining, assembly, pressure testing, actuator integration and control-system commissioning. Downstream customers include hydropower equipment contractors, engineering contractors, power utilities, pumped-storage project developers and owners of operating hydropower plants. New-build projects are typically delivered through turbine or electromechanical packages, while replacement projects may be procured directly from valve manufacturers.

Value Chain Analysis

The highest-value activities are hydraulic and structural engineering, pressure-boundary design, sealing-system development, large-component machining, high-pressure

factory testing and integration of actuation and control systems. These capabilities determine whether a supplier can participate in large-diameter, high-pressure and safety-critical projects. Generic mechanical components account for a smaller share of differentiation and are more exposed to price competition.

Aftermarket engineering adds value throughout the long operating life of a valve. Inspection, seal replacement, actuator upgrades, reverse engineering, control modernization and complete valve replacement can deepen customer relationships and generate recurring revenue. Manufacturers with an installed base and local service capability generally have stronger access to modernization opportunities than suppliers focused only on new-equipment sales.

Segment Insights

By nominal diameter, large valves with diameters above 2,000 mm and extra-large valves above 3,000 mm account for the largest share of revenue, although smaller valves may represent a larger number of individual units. Large dimensions require heavier pressure boundaries, larger servomotors, more demanding transport arrangements and higher-capacity machining and testing equipment, resulting in materially higher average selling prices.

By application, the market is divided into Conventional Hydropower Plants and Pumped-storage Hydropower Plants. Conventional hydropower remains an important installed-base and replacement market, particularly for high-head Pelton and Francis units. Pumped-storage hydropower is the faster-growing application because reversible pump-turbines require reliable bidirectional isolation and because new project development is increasingly concentrated in large-capacity plants.

Downstream Market Opportunities

Pumped-storage hydropower provides the strongest new-installation opportunity. China alone added 7.48 GW of pumped-storage capacity in 2025 and had 65.94 GW in operation at year-end, while its newly approved projects indicate a continuing equipment pipeline. Other Asian countries, Europe and selected markets in the Americas are also advancing pumped-storage development, although project timing remains sensitive to permitting, electricity-market design and financing.

High-head conventional hydropower and installed-base modernization provide more

selective but commercially attractive opportunities. These projects often involve fewer units than large pumped-storage programmes, but extreme pressure conditions, restricted site access and customized replacement requirements can support higher equipment value and stronger engineering margins.

Regional Insights

Asia-Pacific is the largest incremental demand region, led by the rapid construction and commissioning of pumped-storage plants in China. The region also benefits from expanding heavy-manufacturing capacity, localized supply chains and a growing base of domestic engineering expertise. Japan remains a technologically important supplier market, particularly for integrated high-head hydropower and pumped-storage equipment.

Europe has a more balanced demand structure combining selected new pumped-storage developments with modernization and replacement of aging hydropower assets. European manufacturers retain strong positions in high-pressure design, specialized valves and international rehabilitation projects. North America is primarily an installed-base modernization market, while Latin America, Africa and Southeast Asia offer project-specific demand associated with high-head conventional hydropower and selected future storage developments.

Competitive Landscape Analysis

The market has a concentrated core but a broader regional supplier tail. The verified competitive base includes 20 core manufacturing groups, comprising integrated hydropower equipment suppliers and specialist valve manufacturers. Europe has the highest density of specialized producers, China has the strongest expansion in large pumped-storage manufacturing capacity, and Japan maintains a focused presence in high-specification integrated equipment. India and Central and Eastern Europe provide additional regional manufacturing capacity for medium-sized and project-specific valves.

Entry barriers are high because suppliers require proven hydraulic design, large-component manufacturing, high-pressure testing, quality documentation and reference projects. Competition in large and ultra-high-pressure valves is therefore more concentrated than in smaller products. Regional manufacturers can compete effectively in standard and medium-sized projects, while the largest and most safety-critical

contracts tend to favour suppliers with extensive installed references, system-integration capability and long-term service support.

Report Scope

This report is a detailed and comprehensive analysis for global Hydraulic Turbine Main Inlet Spherical Valve market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Nominal Diameter and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Hydraulic Turbine Main Inlet Spherical Valve market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Hydraulic Turbine Main Inlet Spherical Valve market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Hydraulic Turbine Main Inlet Spherical Valve market size and forecasts, by Nominal Diameter and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Hydraulic Turbine Main Inlet Spherical Valve market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Hydraulic Turbine Main Inlet Spherical Valve

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Hydraulic Turbine Main Inlet Spherical Valve market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ANDRITZ AG, Voith GmbH & Co. KGaA, GE Vernova Inc., Dongfang Electric Corporation Limited, Harbin Electric Company Limited, Toshiba Energy Systems & Solutions Corporation, Hitachi Mitsubishi Hydro Corporation, Bharat Heavy Electricals Limited, Litostroj Power d.o.o., Hubei Hongcheng General Machinery Co., Ltd., etc.

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

Hydraulic Turbine Main Inlet Spherical Valve market is split by Nominal Diameter and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Nominal Diameter, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Nominal Diameter

Small Diameter (DN ≤ 1,000 mm)

Medium Diameter (DN > 1,000–2,000 mm)

Large Diameter (DN > 2,000–3,000 mm)

Extra-large Diameter (DN > 3,000 mm)

Market segment by Design Pressure

Low-pressure ($P \leq 2.5$ MPa)

Medium-pressure ($P > 2.5$ – 6.3 MPa)

High-pressure ($P > 6.3$ – 10.0 MPa)

Ultra-high-pressure ($P > 10.0$ MPa)

Market segment by Primary Actuation Medium

Oil-hydraulic Actuation

Water-hydraulic Actuation

Others

Market segment by Application

Conventional Hydropower Plant Application

Pumped-Storage Hydropower Plant Application

Others

Major players covered

ANDRITZ AG

Voith GmbH & Co. KGaA

GE Vernova Inc.

Dongfang Electric Corporation Limited

Harbin Electric Company Limited

Toshiba Energy Systems & Solutions Corporation

Hitachi Mitsubishi Hydro Corporation

Bharat Heavy Electricals Limited

Litostroj Power d.o.o.

Hubei Hongcheng General Machinery Co., Ltd.

Tianjin International Machinery Co., Ltd.

ADAMS Armaturen GmbH

ŽKD Blansko, a.s.

KURIMOTO, LTD.

TB Hydro Sp. z o.o.

Vortex Hydra S.r.l.

Glenfield Invicta Limited

Ševčík HYDRO s.r.o.

Geppert Hydro GmbH

GUGLER Water Turbines GmbH

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Hydraulic Turbine Main Inlet Spherical Valve product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Hydraulic Turbine Main Inlet Spherical Valve, with price, sales quantity, revenue, and global market share of Hydraulic Turbine Main Inlet Spherical Valve from 2021 to 2026.

Chapter 3, the Hydraulic Turbine Main Inlet Spherical Valve competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Hydraulic Turbine Main Inlet Spherical Valve breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Nominal Diameter and by Application, with sales market share and growth rate by Nominal Diameter, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Hydraulic Turbine Main Inlet Spherical Valve market forecast, by regions, by Nominal Diameter, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Hydraulic Turbine Main Inlet Spherical Valve.

Chapter 14 and 15, to describe Hydraulic Turbine Main Inlet Spherical Valve sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Nominal Diameter

1.3.1 Overview: Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Nominal Diameter: 2021 Versus 2025 Versus 2032

1.3.2 Small Diameter (DN ≤ 1,000 mm)

1.3.3 Medium Diameter (DN > 1,000–2,000 mm)

1.3.4 Large Diameter (DN > 2,000–3,000 mm)

1.3.5 Extra-large Diameter (DN > 3,000 mm)

1.4 Market Analysis by Design Pressure

1.4.1 Overview: Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Design Pressure: 2021 Versus 2025 Versus 2032

1.4.2 Low-pressure (P ≤ 2.5 MPa)

1.4.3 Medium-pressure (P > 2.5–6.3 MPa)

1.4.4 High-pressure (P > 6.3–10.0 MPa)

1.4.5 Ultra-high-pressure (P > 10.0 MPa)

1.5 Market Analysis by Primary Actuation Medium

1.5.1 Overview: Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Primary Actuation Medium: 2021 Versus 2025 Versus 2032

1.5.2 Oil-hydraulic Actuation

1.5.3 Water-hydraulic Actuation

1.5.4 Others

1.6 Market Analysis by Application

1.6.1 Overview: Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Conventional Hydropower Plant Application

1.6.3 Pumped-Storage Hydropower Plant Application

1.6.4 Others

1.7 Global Hydraulic Turbine Main Inlet Spherical Valve Market Size & Forecast

1.7.1 Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (2021-2032)

1.7.3 Global Hydraulic Turbine Main Inlet Spherical Valve Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 ANDRITZ AG

2.1.1 ANDRITZ AG Details

2.1.2 ANDRITZ AG Major Business

2.1.3 ANDRITZ AG Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.1.4 ANDRITZ AG Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 ANDRITZ AG Recent Developments/Updates

2.2 Voith GmbH & Co. KGaA

2.2.1 Voith GmbH & Co. KGaA Details

2.2.2 Voith GmbH & Co. KGaA Major Business

2.2.3 Voith GmbH & Co. KGaA Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.2.4 Voith GmbH & Co. KGaA Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Voith GmbH & Co. KGaA Recent Developments/Updates

2.3 GE Vernova Inc.

2.3.1 GE Vernova Inc. Details

2.3.2 GE Vernova Inc. Major Business

2.3.3 GE Vernova Inc. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.3.4 GE Vernova Inc. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 GE Vernova Inc. Recent Developments/Updates

2.4 Dongfang Electric Corporation Limited

2.4.1 Dongfang Electric Corporation Limited Details

2.4.2 Dongfang Electric Corporation Limited Major Business

2.4.3 Dongfang Electric Corporation Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.4.4 Dongfang Electric Corporation Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Dongfang Electric Corporation Limited Recent Developments/Updates

2.5 Harbin Electric Company Limited

2.5.1 Harbin Electric Company Limited Details

2.5.2 Harbin Electric Company Limited Major Business

2.5.3 Harbin Electric Company Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.5.4 Harbin Electric Company Limited Hydraulic Turbine Main Inlet Spherical Valve

Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Harbin Electric Company Limited Recent Developments/Updates

2.6 Toshiba Energy Systems & Solutions Corporation

2.6.1 Toshiba Energy Systems & Solutions Corporation Details

2.6.2 Toshiba Energy Systems & Solutions Corporation Major Business

2.6.3 Toshiba Energy Systems & Solutions Corporation Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.6.4 Toshiba Energy Systems & Solutions Corporation Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Toshiba Energy Systems & Solutions Corporation Recent Developments/Updates

2.7 Hitachi Mitsubishi Hydro Corporation

2.7.1 Hitachi Mitsubishi Hydro Corporation Details

2.7.2 Hitachi Mitsubishi Hydro Corporation Major Business

2.7.3 Hitachi Mitsubishi Hydro Corporation Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.7.4 Hitachi Mitsubishi Hydro Corporation Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Hitachi Mitsubishi Hydro Corporation Recent Developments/Updates

2.8 Bharat Heavy Electricals Limited

2.8.1 Bharat Heavy Electricals Limited Details

2.8.2 Bharat Heavy Electricals Limited Major Business

2.8.3 Bharat Heavy Electricals Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.8.4 Bharat Heavy Electricals Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Bharat Heavy Electricals Limited Recent Developments/Updates

2.9 Litostroj Power d.o.o.

2.9.1 Litostroj Power d.o.o. Details

2.9.2 Litostroj Power d.o.o. Major Business

2.9.3 Litostroj Power d.o.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

2.9.4 Litostroj Power d.o.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Litostroj Power d.o.o. Recent Developments/Updates

2.10 Hubei Hongcheng General Machinery Co., Ltd.

2.10.1 Hubei Hongcheng General Machinery Co., Ltd. Details

- 2.10.2 Hubei Hongcheng General Machinery Co., Ltd. Major Business
- 2.10.3 Hubei Hongcheng General Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
- 2.10.4 Hubei Hongcheng General Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.10.5 Hubei Hongcheng General Machinery Co., Ltd. Recent Developments/Updates
- 2.11 Tianjin International Machinery Co., Ltd.
- 2.11.1 Tianjin International Machinery Co., Ltd. Details
- 2.11.2 Tianjin International Machinery Co., Ltd. Major Business
- 2.11.3 Tianjin International Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
- 2.11.4 Tianjin International Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.11.5 Tianjin International Machinery Co., Ltd. Recent Developments/Updates
- 2.12 ADAMS Armaturen GmbH
- 2.12.1 ADAMS Armaturen GmbH Details
- 2.12.2 ADAMS Armaturen GmbH Major Business
- 2.12.3 ADAMS Armaturen GmbH Hydraulic Turbine Main Inlet Spherical Valve Product and Services
- 2.12.4 ADAMS Armaturen GmbH Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.12.5 ADAMS Armaturen GmbH Recent Developments/Updates
- 2.13 ?KD Blansko, a.s.
- 2.13.1 ?KD Blansko, a.s. Details
- 2.13.2 ?KD Blansko, a.s. Major Business
- 2.13.3 ?KD Blansko, a.s. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
- 2.13.4 ?KD Blansko, a.s. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.13.5 ?KD Blansko, a.s. Recent Developments/Updates
- 2.14 KURIMOTO, LTD.
- 2.14.1 KURIMOTO, LTD. Details
- 2.14.2 KURIMOTO, LTD. Major Business
- 2.14.3 KURIMOTO, LTD. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
- 2.14.4 KURIMOTO, LTD. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.14.5 KURIMOTO, LTD. Recent Developments/Updates
- 2.15 TB Hydro Sp. z o.o.
 - 2.15.1 TB Hydro Sp. z o.o. Details
 - 2.15.2 TB Hydro Sp. z o.o. Major Business
 - 2.15.3 TB Hydro Sp. z o.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
 - 2.15.4 TB Hydro Sp. z o.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.15.5 TB Hydro Sp. z o.o. Recent Developments/Updates
- 2.16 Vortex Hydra S.r.l.
 - 2.16.1 Vortex Hydra S.r.l. Details
 - 2.16.2 Vortex Hydra S.r.l. Major Business
 - 2.16.3 Vortex Hydra S.r.l. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
 - 2.16.4 Vortex Hydra S.r.l. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 Vortex Hydra S.r.l. Recent Developments/Updates
- 2.17 Glenfield Invicta Limited
 - 2.17.1 Glenfield Invicta Limited Details
 - 2.17.2 Glenfield Invicta Limited Major Business
 - 2.17.3 Glenfield Invicta Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services
 - 2.17.4 Glenfield Invicta Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.17.5 Glenfield Invicta Limited Recent Developments/Updates
- 2.18 Ševčík HYDRO s.r.o.
 - 2.18.1 Ševčík HYDRO s.r.o. Details
 - 2.18.2 Ševčík HYDRO s.r.o. Major Business
 - 2.18.3 Ševčík HYDRO s.r.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services
 - 2.18.4 Ševčík HYDRO s.r.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.18.5 Ševčík HYDRO s.r.o. Recent Developments/Updates
- 2.19 Geppert Hydro GmbH
 - 2.19.1 Geppert Hydro GmbH Details
 - 2.19.2 Geppert Hydro GmbH Major Business
 - 2.19.3 Geppert Hydro GmbH Hydraulic Turbine Main Inlet Spherical Valve Product and Services
 - 2.19.4 Geppert Hydro GmbH Hydraulic Turbine Main Inlet Spherical Valve Sales

Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Geppert Hydro GmbH Recent Developments/Updates

2.20 GUGLER Water Turbines GmbH

2.20.1 GUGLER Water Turbines GmbH Details

2.20.2 GUGLER Water Turbines GmbH Major Business

2.20.3 GUGLER Water Turbines GmbH Hydraulic Turbine Main Inlet Spherical Valve
Product and Services

2.20.4 GUGLER Water Turbines GmbH Hydraulic Turbine Main Inlet Spherical Valve
Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 GUGLER Water Turbines GmbH Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: HYDRAULIC TURBINE MAIN INLET SPHERICAL VALVE BY MANUFACTURER

3.1 Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Manufacturer (2021-2026)

3.2 Global Hydraulic Turbine Main Inlet Spherical Valve Revenue by Manufacturer (2021-2026)

3.3 Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Hydraulic Turbine Main Inlet Spherical Valve by
Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Hydraulic Turbine Main Inlet Spherical Valve Manufacturer Market Share
in 2025

3.4.3 Top 6 Hydraulic Turbine Main Inlet Spherical Valve Manufacturer Market Share
in 2025

3.5 Hydraulic Turbine Main Inlet Spherical Valve Market: Overall Company Footprint
Analysis

3.5.1 Hydraulic Turbine Main Inlet Spherical Valve Market: Region Footprint

3.5.2 Hydraulic Turbine Main Inlet Spherical Valve Market: Company Product Type
Footprint

3.5.3 Hydraulic Turbine Main Inlet Spherical Valve Market: Company Product
Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Hydraulic Turbine Main Inlet Spherical Valve Market Size by Region

4.1.1 Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2021-2032)

4.1.2 Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2021-2032)

4.1.3 Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Region (2021-2032)

4.2 North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032)

4.3 Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032)

4.4 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032)

4.5 South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032)

4.6 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032)

5 MARKET SEGMENT BY NOMINAL DIAMETER

5.1 Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2032)

5.2 Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Nominal Diameter (2021-2032)

5.3 Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Nominal Diameter (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)

6.2 Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application (2021-2032)

6.3 Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by

Nominal Diameter (2021-2032)

7.2 North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)

7.3 North America Hydraulic Turbine Main Inlet Spherical Valve Market Size by Country

7.3.1 North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2032)

7.3.2 North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2032)

8.2 Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)

8.3 Europe Hydraulic Turbine Main Inlet Spherical Valve Market Size by Country

8.3.1 Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2032)

8.3.2 Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2032)

9.2 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Market Size by Region

9.3.1 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by

Region (2021-2032)

- 9.3.3 China Market Size and Forecast (2021-2032)
- 9.3.4 Japan Market Size and Forecast (2021-2032)
- 9.3.5 South Korea Market Size and Forecast (2021-2032)
- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2032)
- 10.2 South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)
- 10.3 South America Hydraulic Turbine Main Inlet Spherical Valve Market Size by Country
 - 10.3.1 South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2032)
- 11.2 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Market Size by Country
 - 11.3.1 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Hydraulic Turbine Main Inlet Spherical Valve Market Drivers
- 12.2 Hydraulic Turbine Main Inlet Spherical Valve Market Restraints
- 12.3 Hydraulic Turbine Main Inlet Spherical Valve Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Hydraulic Turbine Main Inlet Spherical Valve and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Hydraulic Turbine Main Inlet Spherical Valve
- 13.3 Hydraulic Turbine Main Inlet Spherical Valve Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Hydraulic Turbine Main Inlet Spherical Valve Typical Distributors
- 14.3 Hydraulic Turbine Main Inlet Spherical Valve Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Nominal Diameter, (USD Million), 2021 & 2025 & 2032

Table 2. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Design Pressure, (USD Million), 2021 & 2025 & 2032

Table 3. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Primary Actuation Medium, (USD Million), 2021 & 2025 & 2032

Table 4. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. ANDRITZ AG Basic Information, Manufacturing Base and Competitors

Table 6. ANDRITZ AG Major Business

Table 7. ANDRITZ AG Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 8. ANDRITZ AG Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. ANDRITZ AG Recent Developments/Updates

Table 10. Voith GmbH & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 11. Voith GmbH & Co. KGaA Major Business

Table 12. Voith GmbH & Co. KGaA Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 13. Voith GmbH & Co. KGaA Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Voith GmbH & Co. KGaA Recent Developments/Updates

Table 15. GE Vernova Inc. Basic Information, Manufacturing Base and Competitors

Table 16. GE Vernova Inc. Major Business

Table 17. GE Vernova Inc. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 18. GE Vernova Inc. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. GE Vernova Inc. Recent Developments/Updates

Table 20. Dongfang Electric Corporation Limited Basic Information, Manufacturing Base and Competitors

Table 21. Dongfang Electric Corporation Limited Major Business
Table 22. Dongfang Electric Corporation Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services
Table 23. Dongfang Electric Corporation Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 24. Dongfang Electric Corporation Limited Recent Developments/Updates
Table 25. Harbin Electric Company Limited Basic Information, Manufacturing Base and Competitors
Table 26. Harbin Electric Company Limited Major Business
Table 27. Harbin Electric Company Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services
Table 28. Harbin Electric Company Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 29. Harbin Electric Company Limited Recent Developments/Updates
Table 30. Toshiba Energy Systems & Solutions Corporation Basic Information, Manufacturing Base and Competitors
Table 31. Toshiba Energy Systems & Solutions Corporation Major Business
Table 32. Toshiba Energy Systems & Solutions Corporation Hydraulic Turbine Main Inlet Spherical Valve Product and Services
Table 33. Toshiba Energy Systems & Solutions Corporation Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 34. Toshiba Energy Systems & Solutions Corporation Recent Developments/Updates
Table 35. Hitachi Mitsubishi Hydro Corporation Basic Information, Manufacturing Base and Competitors
Table 36. Hitachi Mitsubishi Hydro Corporation Major Business
Table 37. Hitachi Mitsubishi Hydro Corporation Hydraulic Turbine Main Inlet Spherical Valve Product and Services
Table 38. Hitachi Mitsubishi Hydro Corporation Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 39. Hitachi Mitsubishi Hydro Corporation Recent Developments/Updates
Table 40. Bharat Heavy Electricals Limited Basic Information, Manufacturing Base and Competitors
Table 41. Bharat Heavy Electricals Limited Major Business
Table 42. Bharat Heavy Electricals Limited Hydraulic Turbine Main Inlet Spherical Valve

Product and Services

Table 43. Bharat Heavy Electricals Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Bharat Heavy Electricals Limited Recent Developments/Updates

Table 45. Litostroj Power d.o.o. Basic Information, Manufacturing Base and Competitors

Table 46. Litostroj Power d.o.o. Major Business

Table 47. Litostroj Power d.o.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 48. Litostroj Power d.o.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Litostroj Power d.o.o. Recent Developments/Updates

Table 50. Hubei Hongcheng General Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 51. Hubei Hongcheng General Machinery Co., Ltd. Major Business

Table 52. Hubei Hongcheng General Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 53. Hubei Hongcheng General Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Hubei Hongcheng General Machinery Co., Ltd. Recent Developments/Updates

Table 55. Tianjin International Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 56. Tianjin International Machinery Co., Ltd. Major Business

Table 57. Tianjin International Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 58. Tianjin International Machinery Co., Ltd. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Tianjin International Machinery Co., Ltd. Recent Developments/Updates

Table 60. ADAMS Armaturen GmbH Basic Information, Manufacturing Base and Competitors

Table 61. ADAMS Armaturen GmbH Major Business

Table 62. ADAMS Armaturen GmbH Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 63. ADAMS Armaturen GmbH Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and

Market Share (2021-2026)

Table 64. ADAMS Armaturen GmbH Recent Developments/Updates

Table 65. ?KD Blansko, a.s. Basic Information, Manufacturing Base and Competitors

Table 66. ?KD Blansko, a.s. Major Business

Table 67. ?KD Blansko, a.s. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 68. ?KD Blansko, a.s. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. ?KD Blansko, a.s. Recent Developments/Updates

Table 70. KURIMOTO, LTD. Basic Information, Manufacturing Base and Competitors

Table 71. KURIMOTO, LTD. Major Business

Table 72. KURIMOTO, LTD. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 73. KURIMOTO, LTD. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. KURIMOTO, LTD. Recent Developments/Updates

Table 75. TB Hydro Sp. z o.o. Basic Information, Manufacturing Base and Competitors

Table 76. TB Hydro Sp. z o.o. Major Business

Table 77. TB Hydro Sp. z o.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 78. TB Hydro Sp. z o.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. TB Hydro Sp. z o.o. Recent Developments/Updates

Table 80. Vortex Hydra S.r.l. Basic Information, Manufacturing Base and Competitors

Table 81. Vortex Hydra S.r.l. Major Business

Table 82. Vortex Hydra S.r.l. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 83. Vortex Hydra S.r.l. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Vortex Hydra S.r.l. Recent Developments/Updates

Table 85. Glenfield Invicta Limited Basic Information, Manufacturing Base and Competitors

Table 86. Glenfield Invicta Limited Major Business

Table 87. Glenfield Invicta Limited Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 88. Glenfield Invicta Limited Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. Glenfield Invicta Limited Recent Developments/Updates

Table 90. Ševčík HYDRO s.r.o. Basic Information, Manufacturing Base and Competitors

Table 91. Ševčík HYDRO s.r.o. Major Business

Table 92. Ševčík HYDRO s.r.o. Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 93. Ševčík HYDRO s.r.o. Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Ševčík HYDRO s.r.o. Recent Developments/Updates

Table 95. Geppert Hydro GmbH Basic Information, Manufacturing Base and Competitors

Table 96. Geppert Hydro GmbH Major Business

Table 97. Geppert Hydro GmbH Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 98. Geppert Hydro GmbH Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. Geppert Hydro GmbH Recent Developments/Updates

Table 100. GUGLER Water Turbines GmbH Basic Information, Manufacturing Base and Competitors

Table 101. GUGLER Water Turbines GmbH Major Business

Table 102. GUGLER Water Turbines GmbH Hydraulic Turbine Main Inlet Spherical Valve Product and Services

Table 103. GUGLER Water Turbines GmbH Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. GUGLER Water Turbines GmbH Recent Developments/Updates

Table 105. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Manufacturer (2021-2026) & (Units)

Table 106. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue by Manufacturer (2021-2026) & (USD Million)

Table 107. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 108. Market Position of Manufacturers in Hydraulic Turbine Main Inlet Spherical Valve, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 109. Head Office and Hydraulic Turbine Main Inlet Spherical Valve Production

Site of Key Manufacturer

Table 110. Hydraulic Turbine Main Inlet Spherical Valve Market: Company Product Type Footprint

Table 111. Hydraulic Turbine Main Inlet Spherical Valve Market: Company Product Application Footprint

Table 112. Hydraulic Turbine Main Inlet Spherical Valve New Market Entrants and Barriers to Market Entry

Table 113. Hydraulic Turbine Main Inlet Spherical Valve Mergers, Acquisition, Agreements, and Collaborations

Table 114. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 115. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2021-2026) & (Units)

Table 116. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2027-2032) & (Units)

Table 117. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2021-2026) & (USD Million)

Table 118. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2027-2032) & (USD Million)

Table 119. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Region (2021-2026) & (K US\$/Unit)

Table 120. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Region (2027-2032) & (K US\$/Unit)

Table 121. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 122. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 123. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Nominal Diameter (2021-2026) & (USD Million)

Table 124. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Nominal Diameter (2027-2032) & (USD Million)

Table 125. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Nominal Diameter (2021-2026) & (K US\$/Unit)

Table 126. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Nominal Diameter (2027-2032) & (K US\$/Unit)

Table 127. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 128. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 129. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application (2021-2026) & (USD Million)

Table 130. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application (2027-2032) & (USD Million)

Table 131. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Application (2021-2026) & (K US\$/Unit)

Table 132. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Application (2027-2032) & (K US\$/Unit)

Table 133. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 134. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 135. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 136. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 137. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2026) & (Units)

Table 138. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2027-2032) & (Units)

Table 139. North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2026) & (USD Million)

Table 140. North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2027-2032) & (USD Million)

Table 141. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 142. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 143. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 144. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 145. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2026) & (Units)

Table 146. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2027-2032) & (Units)

Table 147. Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2026) & (USD Million)

Table 148. Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by

Country (2027-2032) & (USD Million)

Table 149. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 150. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 151. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 152. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 153. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2021-2026) & (Units)

Table 154. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Region (2027-2032) & (Units)

Table 155. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2021-2026) & (USD Million)

Table 156. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Region (2027-2032) & (USD Million)

Table 157. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 158. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 159. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 160. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 161. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2026) & (Units)

Table 162. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2027-2032) & (Units)

Table 163. South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2026) & (USD Million)

Table 164. South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2027-2032) & (USD Million)

Table 165. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2021-2026) & (Units)

Table 166. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Nominal Diameter (2027-2032) & (Units)

Table 167. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2021-2026) & (Units)

Table 168. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Application (2027-2032) & (Units)

Table 169. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2021-2026) & (Units)

Table 170. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity by Country (2027-2032) & (Units)

Table 171. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2021-2026) & (USD Million)

Table 172. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Country (2027-2032) & (USD Million)

Table 173. Hydraulic Turbine Main Inlet Spherical Valve Raw Material

Table 174. Key Manufacturers of Hydraulic Turbine Main Inlet Spherical Valve Raw Materials

Table 175. Hydraulic Turbine Main Inlet Spherical Valve Typical Distributors

Table 176. Hydraulic Turbine Main Inlet Spherical Valve Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Hydraulic Turbine Main Inlet Spherical Valve Picture
- Figure 2. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue by Nominal Diameter, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Nominal Diameter in 2025
- Figure 4. Small Diameter (DN ≤ 1,000 mm) Examples
- Figure 5. Medium Diameter (DN > 1,000–2,000 mm) Examples
- Figure 6. Large Diameter (DN > 2,000–3,000 mm) Examples
- Figure 7. Extra-large Diameter (DN > 3,000 mm) Examples
- Figure 8. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue by Design Pressure, (USD Million), 2021 & 2025 & 2032
- Figure 9. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Design Pressure in 2025
- Figure 10. Low-pressure (P ≤ 2.5 MPa) Examples
- Figure 11. Medium-pressure (P > 2.5–6.3 MPa) Examples
- Figure 12. High-pressure (P > 6.3–10.0 MPa) Examples
- Figure 13. Ultra-high-pressure (P > 10.0 MPa) Examples
- Figure 14. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue by Primary Actuation Medium, (USD Million), 2021 & 2025 & 2032
- Figure 15. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Primary Actuation Medium in 2025
- Figure 16. Oil-hydraulic Actuation Examples
- Figure 17. Water-hydraulic Actuation Examples
- Figure 18. Others Examples
- Figure 19. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 20. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Application in 2025
- Figure 21. Conventional Hydropower Plant Application Examples
- Figure 22. Pumped-Storage Hydropower Plant Application Examples
- Figure 23. Others Examples
- Figure 24. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 25. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 26. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity (2021-2032) & (Units)

Figure 27. Global Hydraulic Turbine Main Inlet Spherical Valve Price (2021-2032) & (K US\$/Unit)

Figure 28. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Manufacturer in 2025

Figure 29. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of Hydraulic Turbine Main Inlet Spherical Valve by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 Hydraulic Turbine Main Inlet Spherical Valve Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 Hydraulic Turbine Main Inlet Spherical Valve Manufacturer (Revenue) Market Share in 2025

Figure 33. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Region (2021-2032)

Figure 35. North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 38. South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 40. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 41. Global Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Nominal Diameter (2021-2032)

Figure 42. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by Nominal Diameter (2021-2032) & (K US\$/Unit)

Figure 43. Global Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global Hydraulic Turbine Main Inlet Spherical Valve Revenue Market Share by Application (2021-2032)

Figure 45. Global Hydraulic Turbine Main Inlet Spherical Valve Average Price by

Application (2021-2032) & (K US\$/Unit)

Figure 46. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 47. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Country (2021-2032)

Figure 49. North America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Country (2021-2032)

Figure 50. United States Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 54. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Country (2021-2032)

Figure 57. Germany Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 58. France Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 63. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Region (2021-2032)

Figure 66. China Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 69. India Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 72. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 73. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Nominal Diameter (2021-2032)

Figure 79. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 83. Egypt Hydraulic Turbine Main Inlet Spherical Valve Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia Hydraulic Turbine Main Inlet Spherical Valve Consumption

Value (2021-2032) & (USD Million)

Figure 85. South Africa Hydraulic Turbine Main Inlet Spherical Valve Consumption

Value (2021-2032) & (USD Million)

Figure 86. Hydraulic Turbine Main Inlet Spherical Valve Market Drivers

Figure 87. Hydraulic Turbine Main Inlet Spherical Valve Market Restraints

Figure 88. Hydraulic Turbine Main Inlet Spherical Valve Market Trends

Figure 89. Porters Five Forces Analysis

Figure 90. Manufacturing Cost Structure Analysis of Hydraulic Turbine Main Inlet Spherical Valve in 2025

Figure 91. Manufacturing Process Analysis of Hydraulic Turbine Main Inlet Spherical Valve

Figure 92. Hydraulic Turbine Main Inlet Spherical Valve Industrial Chain

Figure 93. Sales Channel: Direct to End-User vs Distributors

Figure 94. Direct Channel Pros & Cons

Figure 95. Indirect Channel Pros & Cons

Figure 96. Methodology

Figure 97. Research Process and Data Source

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