

Global Large Heavy-Duty Process Centrifugal Compressors 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 Large Heavy-Duty Process Centrifugal Compressors market size was valued at US\$ 4990 million in 2025 and is forecast to a readjusted size of US\$ 7259 million by 2032 with a CAGR of 5.5% during review period.

Large heavy-duty process centrifugal compressors are high-end turbomachinery systems used for continuous compression of air and process gases in petroleum refining, natural gas transmission, LNG, petrochemicals, coal chemicals, fertilizers, air separation, industrial gases, metallurgy, CO₂ compression, process refrigeration, and energy infrastructure. These machines convert mechanical power into gas kinetic energy through high-speed rotating impellers and then into pressure energy through diffusers, return channels, and casings. Typical configurations include single-shaft multi-stage compressors, barrel-type compressors, horizontally split compressors, integrally geared compressors, pipeline compressors, ASU air compressors, oxygen and nitrogen turbo-compressors, LNG boil-off gas compressors, and process refrigeration centrifugal compressors. They are normally supplied as engineered compressor trains with seals, lubrication systems, gearboxes, couplings, coolers, anti-surge control systems, and process instrumentation. The segment is characterized by high power, large flow, long-cycle operation, high reliability, customized engineering, and strict compliance requirements.

Based on our research, large heavy-duty process centrifugal compressors should be analyzed as engineered turbomachinery for process gas and large-scale industrial applications, rather than as a generic air compressor category. The market is defined by continuous-duty operation, large flow, high power, high reliability, stringent project

specifications, and deep customization. Standards such as API 617, ISO 10439, and ASME PTC 10 provide the technical context for procurement, design, manufacturing, testing, and acceptance. As a result, the industry has high barriers to entry in aerodynamics, rotor dynamics, materials, sealing systems, anti-surge control, full-load testing, and long-cycle project execution. Companies that qualify for the core formal list are typically true OEMs with proven references in oil and gas, petrochemicals, LNG, air separation, industrial gases, or comparable mission-critical plants.

Demand growth through 2032 is expected to be driven by LNG and gas infrastructure, refinery and petrochemical upgrades, large ASU projects, coal chemical and fertilizer investments, industrial gas supply systems, CO₂ compression for CCUS, and emerging hydrogen-related applications. Project revenue is highly lumpy because a single compressor train can be tied to a large capital project, and revenue recognition depends on engineering, manufacturing, testing, shipment, and commissioning schedules. China's demand is strongly linked to air separation, coal chemicals, and localization, while demand in Europe, North America, Japan, and Korea is more connected to LNG, decarbonization projects, industrial gases, and replacement of legacy equipment. Regional pricing differences are material, with Chinese suppliers generally competing more aggressively on cost for domestic projects.

From a technology perspective, the industry is moving toward higher-efficiency 3D impellers, wider operating range, variable inlet guide vanes, variable diffuser systems, dry gas sealing, integrally geared multi-shaft layouts, magnetic bearings, high-speed motors, remote monitoring, and digital lifecycle services. Traditional single-shaft and barrel-type compressors remain central to high-pressure oil, gas, petrochemical, and pipeline applications, while integrally geared compressors are gaining relevance in air separation, industrial gases, PTA, CO₂ compression, and selected process applications. Cryogenic BOG compressors and cold centrifugal compressors represent smaller but strategically important niches in LNG and low-temperature engineering. Future competition will be shaped less by standalone hardware efficiency and more by train-level integration, reliability, delivery capability, lifecycle service, and risk management.

From the industry outlook perspective, the global market for large heavy-duty process centrifugal compressors is expected to remain in a steady but selective growth cycle rather than entering a high-volume expansion phase. Demand growth will mainly come from LNG and natural gas infrastructure, refinery and petrochemical upgrades, large-scale air separation units, industrial gas capacity additions, CO₂ compression for

CCUS, and selected hydrogen-related projects. The market size is supported by high equipment value, long project cycles, strict reliability requirements, and the limited number of qualified OEMs capable of delivering large compressor trains for mission-critical applications. At the same time, growth will be constrained by capital expenditure cycles in oil, gas, and chemicals, project delays, geopolitical uncertainty, localization pressure, and price competition from regional suppliers, especially in China. In our view, the industry will continue to show a layered structure: global leaders will retain advantages in LNG, oil and gas, high-pressure process gas, and complex international projects; regional champions will gain share in domestic refinery, coal chemical, air separation, and industrial gas projects; and niche suppliers will focus on cryogenic, BOG, process refrigeration, oil-free air, and integrally geared compressor applications. Overall, the industry outlook remains positive, but future competition will increasingly depend on lifecycle reliability, system integration capability, low-carbon process adaptability, and localized delivery strength rather than product performance alone.

This report is a detailed and comprehensive analysis for global Large Heavy-Duty Process Centrifugal Compressors market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Large Heavy-Duty Process Centrifugal Compressors market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Large Heavy-Duty Process Centrifugal Compressors market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Large Heavy-Duty Process Centrifugal Compressors market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Large Heavy-Duty Process Centrifugal Compressors market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 Large Heavy-Duty Process Centrifugal Compressors

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 Large Heavy-Duty Process Centrifugal Compressors 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 Baker Hughes Company, Siemens Energy AG, Caterpillar Inc., Mitsubishi Heavy Industries, Ltd., EBARA Corporation, Atlas Copco AB, Kobe Steel, Ltd., Everllence SE, Chart Industries, Inc., Hitachi, Ltd., etc.

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

Market Segmentation

Large Heavy-Duty Process Centrifugal Compressors market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Single-shaft Multi-stage Centrifugal Compressor

Horizontally Split Centrifugal Compressor

Other Special Configurations

Market segment by Pressure Class

Low-pressure Centrifugal Compressor

Medium-pressure Centrifugal Compressor

High-pressure Centrifugal Compressor

Ultra-high-pressure Centrifugal Compressor

Market segment by Cooling / Process Arrangement

Intercooled Compression

Non-intercooled Compression

Other

Market segment by Drive Type

Electric Motor-driven Compressor

Steam Turbine-driven Compressor

Gas Turbine-driven Compressor

Expander-coupled Compressor

Other Drive Types

Market segment by Application

Process Gas Compression

Natural Gas Compression

CO₂ Compression

Other

Major players covered

Baker Hughes Company

Siemens Energy AG

Caterpillar Inc.

Mitsubishi Heavy Industries, Ltd.

EBARA Corporation

Atlas Copco AB

Kobe Steel, Ltd.

Everllence SE

Chart Industries, Inc.

Hitachi, Ltd.

Kawasaki Heavy Industries, Ltd.

IHI Corporation

Johnson Controls International plc

Ingersoll Rand Inc.

Shenyang Blower Works Group Corporation

Xi'an Shaangu Power Co., Ltd.

Hangzhou Oxygen Plant Group Co., Ltd.

Hanwha Power Co., Ltd.

FS-Elliott Co., LLC

Sundyne, LLC

Linde plc

Air Liquide S.A.

Chongqing Machinery & Electric Co., Ltd.

Kaishan Group Co., Ltd.

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Large Heavy-Duty Process Centrifugal Compressors product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Large Heavy-Duty Process Centrifugal Compressors, with price, sales quantity, revenue, and global market share of Large Heavy-Duty Process Centrifugal Compressors from 2021 to 2026.

Chapter 3, the Large Heavy-Duty Process Centrifugal Compressors competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Large Heavy-Duty Process Centrifugal Compressors 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 Type and by Application, with sales market share and growth rate by Type, 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 Large Heavy-Duty Process Centrifugal Compressors market forecast, by regions, by Type, 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 Large Heavy-Duty Process Centrifugal Compressors.

Chapter 14 and 15, to describe Large Heavy-Duty Process Centrifugal Compressors sales channel, distributors, customers, research findings and conclusion.

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