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Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size was valued at US$ 37.04 million in 2025 and is forecast to a readjusted size of US$ 79.47 million by 2032 with a CAGR of 10.3% during review period.

A large steam turbine and electric motor dual drive air separation compressor trains is a high-power, integrated turbomachinery system that provides feed-air compression and air boosting for large cryogenic air separation units. Its defining feature is that an industrial steam turbine and a high-power electric motor can independently or jointly deliver mechanical power to the same compressor shaft train, with the power split dynamically adjusted according to steam availability, electrical load, plant output, and operating cost.The system mainly consists of an axial-flow or centrifugal main air compressor, an integrally geared air booster compressor, an industrial steam turbine, a synchronous motor or integrated motor-generator, a gearbox, a variable-speed clutch, couplings, a lubrication oil system, a cooling system, a sealing system, an anti-surge system, a shaft monitoring system, and a coordinated steam-electric control system. Typical configurations include a standalone main air compressor, a combined main air compressor and booster compressor arrangement, and an integrated air compression and boosting configuration.The manufacturing process covers aerodynamic and thermodynamic design, rotor-dynamic analysis, precision machining of impellers and rotors, steam-turbine flow-path design, large-motor matching, torsional vibration analysis of the shaft train, complete machine assembly, mechanical running tests, and coordinated control logic commissioning. Key specifications include the oxygen

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production capacity of the supporting air separation unit, inlet air flow, discharge pressure, pressure ratio, drive power, isothermal efficiency, steam-turbine inlet and exhaust parameters, motor voltage and speed, shaft critical speed, surge margin, vibration level, and continuous operating reliability.Large compressor trains are generally used with air separation units having a nominal oxygen production capacity of 40,000 standard cubic meters per hour or above. Main air flow can range from several hundred thousand to one million cubic meters per hour, while drive power is typically between 20 MW and 120 MW.The core function of the system is to ensure continuous and stable air supply for the air separation unit while directly utilizing by-product steam or waste-heat steam, thereby reducing the intermediate conversion losses associated with steam power generation followed by electrical drive. It also enables efficient operation under fluctuating steam supply, peak-valley electricity pricing, and variable plant load conditions.The system is mainly used in coal chemicals, synthetic ammonia, methanol production, non-ferrous metal smelting, iron and steel, integrated refining and petrochemical complexes, and large industrial gas projects. In 2025, the average gross margin of the global large steam turbine and electric motor dual drive air separation compressor trains industry was approximately 25% to 35%.

The value chain for large steam turbine and electric motor dual drive air separation compressor trains has the characteristics of a high end engineered equipment industry rather than a standardized compressor market. The upstream segment supplies large forgings and castings, alloy steel rotor materials, precision impellers, high speed gears, journal bearings, dry gas seals, variable speed clutches, high power synchronous motors, valves, sensors and control hardware. The midstream segment performs aerodynamic design, thermal calculation, rotor dynamic analysis, torsional vibration assessment, precision machining, steam turbine matching, train assembly, mechanical testing and integrated control validation. The highest value is created through system engineering, common shaft stability, compressor efficiency across a wide operating range and the ability to guarantee continuous operation. The downstream segment consists mainly of coal chemical plants, ammonia and methanol facilities, nonferrous metal smelters, steel complexes, refineries and industrial gas projects. Purchasing decisions are normally made together with the design of the complete air separation unit and the plant steam network. Competition therefore depends less on the isolated efficiency of one compressor and more on the supplier?s ability to coordinate steam, electricity, compression duty and overall plant energy balance. Suppliers with large test stands, advanced machining capability, proven rotor systems and extensive field service resources have a structural advantage in major projects.

Global supply is concentrated within a limited number of heavy turbomachinery

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manufacturing systems in Europe, China, Japan and North America, although publicly confirmed commercial projects using coordinated steam turbine and electric motor drives remain scarce. European suppliers have strong capabilities in axial compressors, integrally geared compressors, industrial steam turbines and international service networks. Chinese manufacturers have developed clearer dual drive applications through domestic coal chemical, nonferrous metal and large air separation projects. Japanese manufacturers retain established positions in steel related oxygen production and large centrifugal compressor applications, while North American suppliers are more strongly represented in electrically driven centrifugal compressors and medium scale air separation equipment. The supply chain is gradually moving away from a model based entirely on cross border shipment of complete machinery. Major projects increasingly combine global sourcing of critical components with regional assembly, commissioning, spare parts support and long term maintenance. Local service capacity has become particularly important because shutdown costs for a large air separation unit are high and replacement parts can require long manufacturing lead times. Merger and acquisition activity in the broader sector has focused on expanding compressor portfolios, digital service capability and international repair networks rather than creating a separate group of specialized dual drive brands.

Demand is concentrated in process industries that combine continuous large scale oxygen consumption with a stable source of byproduct steam. Coal chemical and ammonia projects require uninterrupted oxygen and nitrogen supply for gasification, synthesis and purification processes. Nonferrous metal smelters and steel plants create demand through oxygen enriched production, replacement of older oxygen plants and optimization of steam networks. Refining, petrochemical and industrial gas projects place greater emphasis on flexible load operation, multiple plant supply and control of total energy cost. Demand will not be evenly distributed across all new large air separation projects. Facilities with abundant low cost electricity, increasing access to renewable power or an unstable steam balance may continue to select fully electric compressor trains. Dual drive systems are more attractive where steam would otherwise be converted into electricity at lower overall efficiency, where electrical peak demand is expensive, or where steam production varies with the operating rate of another process unit. Product development is moving toward larger flow capacity, higher shaft power, integrated main air and booster compression, variable speed regulation and automated power sharing. Remote condition monitoring, performance optimization, digital twins and predictive maintenance are also becoming more closely connected to the original equipment contract and the long term service relationship.

Energy efficiency policy, industrial equipment renewal and process energy system

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optimization provide a supportive environment for the sector. Current policy direction encourages the recovery and direct utilization of high pressure and low pressure steam, waste heat and residual pressure, together with the adoption of large efficient compressors and other advanced energy saving equipment. Capital expenditure for efficiency upgrades in existing chemical, steel and nonferrous metal facilities is likely to provide a more stable source of demand than construction of entirely new capacity. Manufacturing investment is increasingly directed toward large mechanical test facilities, advanced five axis machining centres, digital assembly systems and integrated control platforms. New product development is placing greater emphasis on high power drive systems, broad operating range efficiency, rapid load transfer and coordination among several energy sources. The long term outlook is positive but remains subject to the characteristics of a project based and low volume market, where individual orders can create significant annual fluctuations. Improvements in fully electric compressor efficiency, declining renewable electricity costs and changes in the economic value of steam will limit universal adoption. Dual drive technology is therefore expected to remain a specialized energy optimization solution for selected energy intensive process plants rather than becoming the standard configuration for every large air separation unit.

Report Scope

This report is a detailed and comprehensive analysis for global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

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Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

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 Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Xi'an Shaangu Power Co., Ltd., Everllence SE, Siemens Energy AG, Shenyang Blower Works Group Corporation, Atlas Copco Gas and Process, Kobe Steel, Ltd., Mitsubishi Heavy Industries Compressor Corporation, Hanwha Power Co., Ltd., etc.

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

Market Segmentation

Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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

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your business by targeting qualified niche markets.

Market segment by Type

Main Air Compressor Dual-Drive Train

Integrated Main Air and Booster Dual-Drive Train

Others

Market segment by ASU Oxygen Capacity

40,000 to Less Than 60,000 Nm?/h

60,000 to Less Than 100,000 Nm?/h

100,000 Nm?/h and Above

Market segment by Total Drive Power

Less Than 20 MW

20 MW to Less Than 40 MW

40 MW to Less Than 80 MW

80 MW and Above

Market segment by Application

Coal Chemicals

Refining and Petrochemicals

Iron and Steel

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Nonferrous Metals

Industrial Gas Supply

Others

Major players covered

Xi'an Shaangu Power Co., Ltd.

Everllence SE

Siemens Energy AG

Shenyang Blower Works Group Corporation

Atlas Copco Gas and Process

Kobe Steel, Ltd.

Mitsubishi Heavy Industries Compressor Corporation

Hanwha Power 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)

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Chapter Outline

Chapter 1, to describe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains, with price, sales quantity, revenue, and global market share of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains from 2021 to 2026.

Chapter 3, the Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains.

Chapter 14 and 15, to describe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains sales channel, distributors, customers, research findings and conclusion.

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