

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GFB0817C1CD0EN.html>

Date: August 2026

Pages: 106

Price: US\$ 4,480.00 (Single User License)

ID: GFB0817C1CD0EN

Abstracts

The global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size is expected to reach \$ 79.47 million by 2032, rising at a market growth of 10.3% CAGR during the forecast period (2026-2032).

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 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 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 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 studies the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains total production and demand, 2021-2032, (Units)

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains total production value, 2021-2032, (USD Million)

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

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

Trains consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains domestic production, consumption, key domestic manufacturers and share

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

Trains production by manufacturer, production, price, value and market share

2021-2026, (USD Million) & (Units)

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

Trains production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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

Trains production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

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

Trains Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market, Segmentation by Type:

Main Air Compressor Dual-Drive Train

Integrated Main Air and Booster Dual-Drive Train

Others

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market, Segmentation by ASU Oxygen Capacity:

40,000 to Less Than 60,000 Nm³/h

60,000 to Less Than 100,000 Nm³/h

100,000 Nm³/h and Above

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

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market, Segmentation by Application:

Coal Chemicals

Refining and Petrochemicals

Iron and Steel

Nonferrous Metals

Industrial Gas Supply

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?
2. What is the demand of the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?
3. What is the year over year growth of the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?
4. What is the production and production value of the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?
5. Who are the key producers in the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?
6. What are the growth factors driving the market demand?

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