

Global Reversible Pump-Turbine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Reversible Pump-Turbine market size is expected to reach \$ 3853 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

Reversible pump-turbines are large hydraulic machines used in pumped-storage power plants to perform both pumping and power-generation functions through a common runner, guide-vane system and hydraulic passage. In pumping mode, the machine is driven by a motor-generator to transfer water from a lower reservoir to an upper reservoir; in generating mode, water released from the upper reservoir drives the same machine to produce mechanical power for electricity generation. The market focuses on complete reversible pump-turbines and directly associated hydraulic-mechanical packages, including runners, shafts, wicket gates, stay rings, spiral casings, head covers, bottom rings, shaft seals and integrated hydraulic components, together with inseparable hydraulic design, model testing, commissioning and performance-verification services. Major product configurations include reversible Francis, Deriaz and axial-flow designs; single-stage and multi-stage structures; fixed-speed and variable-speed arrangements; and vertical- or horizontal-shaft units. Key applications include new large-scale pumped-storage plants, distributed and small-scale pumped storage, conversion of conventional hydropower facilities, and modernization or major component replacement for operating units.

Key Findings

2025 global average selling price was approximately US\$20–25 million per unit.

The industry's overall gross margin remained at approximately 22%–28% in

2025. Reversible Francis pump-turbines remain the dominant product type. 300–500 MW is the mainstream capacity range for large new-build units. Variable-speed pump-turbines occupy a higher-value technology segment. New large-scale pumped-storage plants remain the largest application market. Asia-Pacific remains the largest regional demand market. High-head, wide-head-range, and variable-speed products have relatively high technical barriers.

Market Trends

Product development is shifting from a primary focus on rated output toward greater operational flexibility, wider stable operating ranges and improved performance under frequent starts, stops and mode transitions. Variable-speed technology is becoming more important because it enables adjustable pumping power, wider turbine operating ranges and stronger bidirectional frequency support. Current supplier programs also emphasize wide-head-range hydraulic design, high-head operation, higher rotational speed, lower pressure pulsation and improved stability outside the best-efficiency point. Recent variable-speed project awards and modernization contracts indicate that this technology is moving beyond a limited number of flagship installations into a broader range of new-build and retrofit projects.

Large reversible Francis units remain the principal product form, while specialized opportunities are emerging for smaller variable-speed equipment, underground schemes, mine-pit projects and conversions of existing hydropower infrastructure. Digital hydraulic simulation, model testing, precision manufacturing and condition monitoring are becoming more deeply integrated into product development. Updated technical standards for Francis pump-turbines and installation procedures also reflect the industry's increasing focus on operating stability, manufacturing quality and lifecycle performance.

Market Dynamics

Demand is supported by the need for dispatchable capacity, long-duration storage and grid flexibility, but market revenue remains project-driven and uneven across individual years. Reversible pump-turbines are customized for specific head, flow, reservoir and operating conditions, and equipment contracts commonly extend across several years from hydraulic design and model testing to manufacturing, shipment and

commissioning. Consequently, annual manufacturer revenue is determined not only by newly commissioned capacity but also by the execution stage of projects scheduled to enter operation in later years.

The market combines strong long-term demand visibility with high short-term order volatility. A large global construction pipeline supports manufacturing activity, but individual projects remain exposed to permitting, geology, civil construction progress, financing conditions and grid-connection schedules. Equipment suppliers with diversified geographic exposure, established model-testing capabilities and a balanced mix of new-build and modernization business are therefore better positioned to manage project-cycle fluctuations.

Drivers

The primary market driver is the rapid expansion of variable renewable generation, which increases the need for large-scale resources capable of absorbing surplus electricity and delivering power during periods of lower wind and solar output. Pumped storage can provide peak shaving, valley filling, frequency regulation, operating reserve, voltage support, black start and long-duration energy shifting through the same facility. The International Energy Agency forecasts annual pumped-storage additions to reach 16.5 GW by 2030, with China accounting for more than 60% of worldwide growth during the forecast period.

National energy-security policies and power-system reliability requirements provide a second major driver. Pumped storage is a mature form of long-duration storage that can support flexibility over periods extending from hours to days, while its large rotating equipment can also contribute inertia and system-restoration capability. These characteristics strengthen the role of reversible pump-turbines as renewable penetration rises and conventional synchronous generation is gradually displaced.

Restraints

The principal restraint is the long and capital-intensive development cycle of pumped-storage projects. Suitable sites require adequate elevation difference, geological stability, water availability, transmission access and acceptable environmental and social impacts. Project approval, reservoir construction and underground civil works can take considerably longer than equipment manufacturing, creating uncertainty in tender timing and order conversion.

The equipment market also faces price pressure from competitive procurement and increasing localization. Standard large-capacity projects can generate substantial volumes but may offer lower unit pricing than technically complex high-head, variable-speed or modernization projects. Because complete project contracts often combine hydraulic machinery, motor-generators, electrical systems and auxiliary equipment, manufacturers must also manage contract-boundary risk, cost escalation and milestone-based revenue recognition.

Opportunities

The largest opportunity remains the supply of complete reversible pump-turbines for new large-scale pumped-storage plants. With 243 GW of capacity already under construction worldwide, the addressable manufacturing pipeline extends well beyond projects entering service in the immediate year. High-head sites, wide-head-variation projects and systems requiring adjustable pumping power provide additional opportunities for advanced hydraulic designs and variable-speed equipment.

A second opportunity comes from the modernization of the existing fleet. Older plants increasingly require runner replacement, efficiency improvement, operating-range expansion, stability enhancement and adaptation to more frequent cycling. Conversion of conventional hydropower facilities and utilization of existing reservoirs can reduce part of the civil-infrastructure requirement, while distributed and small-scale pumped-storage projects may create a specialized market for lower-output, modular and variable-speed machines.

Challenges

Reversible pump-turbines operate under more complex hydraulic conditions than conventional generating-only turbines. Suppliers must control cavitation, pressure pulsation, pump-mode hump characteristics, instability in the turbine S-shaped region, hydraulic thrust and mechanical stress during rapid mode transitions. These challenges become more demanding at higher heads, higher rotational speeds and wider operating ranges.

The industry also faces a limited global pool of qualified hydraulic designers, model laboratories and heavy-manufacturing facilities. Large runners, stay rings and spiral casings require specialized casting, welding, heat treatment, precision machining and

transport capabilities. Variable-speed projects add further integration requirements between the hydraulic machine, motor-generator, converter and control system, increasing interface-management and commissioning risks.

Industry Chain Analysis

The upstream industry includes high-grade steel plate, stainless steel, cast and forged components, welding materials, bearings, seals, coatings, control components and large machining equipment. Critical upstream products include runner castings or welded runner sections, large shafts, guide-vane assemblies, stay rings and spiral-casing structures. Quality consistency, traceability and heavy-component manufacturing capacity are more important than simple material cost because defects can affect efficiency, vibration, fatigue life and project schedules.

The midstream consists of hydraulic design, computational simulation, model testing, detailed engineering, component manufacturing, factory assembly, logistics, installation supervision and commissioning. Downstream participants include pumped-storage developers, electric utilities, independent power producers, hydropower operators, engineering contractors and grid companies. Procurement decisions are influenced by lifecycle efficiency, operating stability, availability, maintenance requirements, delivery reliability and the supplier's ability to guarantee performance across both pumping and generating modes.

Value Chain Analysis

The highest-value activities are concentrated in hydraulic development, model testing, runner design, system integration, precision manufacturing and performance guarantees. These capabilities determine efficiency, stable operating range, cavitation performance and the ability to meet site-specific head and flow conditions. Large machining facilities and proven reference projects also create substantial entry barriers.

Manufacturing of standard structural components is comparatively more price-sensitive, while advanced runners, variable-speed hydraulic optimization and high-head solutions occupy the premium segment. Aftermarket services, including modernization engineering, replacement runners, efficiency upgrades, field diagnostics and long-term service, can provide more stable margins and less cyclical revenue than new-build equipment alone.

Segment Insights

By hydraulic design, reversible Francis pump-turbines remain the dominant category because they provide a practical balance of head range, unit output, efficiency and manufacturing maturity. Deriaz and axial-flow reversible designs serve narrower applications associated with wider head variation or relatively low-head, high-flow conditions. By stage configuration, single-stage machines account for most installations, while multi-stage designs are reserved for exceptional high-head applications.

By rated output, the above-300-MW-to-500-MW segment represents the mainstream range for current large-scale projects. Fixed-speed units retain the largest installed and new-order base because of their mature design and lower system complexity, while variable-speed units command higher technical value where adjustable pumping power and enhanced grid services are required. By application, new large-scale pumped-storage plants remain the leading segment, followed by existing-unit modernization and major component replacement, conversion of conventional hydropower facilities, and distributed or small-scale pumped storage.

Downstream Market Opportunities

New Large-Scale Pumped-Storage Plants represent the largest downstream opportunity, particularly in regions building renewable-heavy power systems and new transmission networks. Projects with large unit ratings, high heads and multiple identical units support scale manufacturing, although competition and localization can place pressure on pricing.

Existing Unit Modernization and Major Component Replacement offer a growing recurring market in mature hydropower regions. Conversion of Conventional Hydropower Plants can create equipment demand while making use of existing reservoirs and grid connections. Distributed and Small-Scale Pumped Storage remains smaller but provides opportunities in industrial parks, isolated grids, mining areas and locations where conventional gigawatt-scale development is unsuitable.

Regional Insights

Asia-Pacific is the leading demand region and the principal source of new

manufacturing orders. China has the world's largest pumped-storage construction pipeline, while Japan and South Korea maintain demand for technically advanced projects and fleet modernization. India and Australia are developing additional large projects to support solar and wind integration. China's installed capacity reached 62.365 GW by August 2025, and the country is targeting approximately 120 GW by 2030.

Europe combines new variable-speed projects with substantial modernization demand from an established operating fleet. North America has a large installed base and significant long-term development potential, although permitting and project-development timelines constrain near-term conversion. Latin America, the Middle East and Africa remain more project-specific markets, with demand concentrated in countries that possess suitable topography, strong grid-growth requirements and access to long-term infrastructure financing.

Competitive Landscape Analysis

The competitive landscape is highly concentrated because only a limited number of manufacturing groups possess the combined hydraulic-development, model-testing, heavy-machining and global project-delivery capabilities required for large reversible pump-turbines. This study identifies 14 verified core manufacturing groups. European and Japanese suppliers retain strong positions in variable-speed technology, high-head engineering and modernization, while Chinese suppliers benefit from a large domestic project pipeline, expanding manufacturing capacity and increasing localization of high-capacity equipment.

Regional competition is becoming more differentiated. Large international groups compete for technically demanding and cross-border projects, while domestic suppliers in China, India and South Korea increasingly participate in local procurement and manufacturing. Competitive advantage depends less on catalogue breadth than on proven reference projects, guaranteed hydraulic performance, manufacturing quality, delivery execution, local service capability and the ability to coordinate the hydraulic machine with motor-generator and control-system requirements.

Report Scope

This report studies the global Reversible Pump-Turbine production, demand, key

manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Reversible Pump-Turbine 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 Reversible Pump-Turbine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Reversible Pump-Turbine total production and demand, 2021-2032, (Units)

Global Reversible Pump-Turbine total production value, 2021-2032, (USD Million)

Global Reversible Pump-Turbine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Reversible Pump-Turbine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Reversible Pump-Turbine domestic production, consumption, key domestic manufacturers and share

Global Reversible Pump-Turbine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Reversible Pump-Turbine production by Hydraulic Design, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Reversible Pump-Turbine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Reversible Pump-Turbine 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 Voith GmbH & Co. KGaA, ANDRITZ AG, GE Vernova Inc., Harbin Electric Corporation, Dongfang Electric Corporation, Toshiba Corporation, Hitachi Mitsubishi Hydro Corporation, Zhefu Holding Group Co., Ltd., Wikov Industry a.s., Power Machines PJSC, 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 Reversible Pump-Turbine 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 Hydraulic Design, 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 Reversible Pump-Turbine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Reversible Pump-Turbine Market, Segmentation by Hydraulic Design:

Reversible Francis Pump-Turbine

Reversible Deriaz Pump-Turbine

Reversible Axial-Flow Pump-Turbine

Others

Global Reversible Pump-Turbine Market, Segmentation by Shaft Orientation:

Vertical-Shaft Pump-Turbine

Horizontal-Shaft Pump-Turbine

Others

Global Reversible Pump-Turbine Market, Segmentation by Speed Arrangement:

Fixed-Speed Pump-Turbine

Variable-Speed Pump-Turbine

Global Reversible Pump-Turbine Market, Segmentation by Rated Unit Output:

Up to 100 MW

Above 100 MW to 300 MW

Above 300 MW to 500 MW

Above 500 MW

Global Reversible Pump-Turbine Market, Segmentation by Application:

New Large-Scale Pumped-Storage Plants

Distributed and Small-Scale Pumped Storage

Conversion of Conventional Hydropower Plants

Others

Companies Profiled:

Voith GmbH & Co. KGaA

ANDRITZ AG

GE Vernova Inc.

Harbin Electric Corporation

Dongfang Electric Corporation

Toshiba Corporation

Hitachi Mitsubishi Hydro Corporation

Zhefu Holding Group Co., Ltd.

Wikov Industry a.s.

Power Machines PJSC

Bharat Heavy Electricals Limited

IMPSA S.A.

Doosan Enerbility Co., Ltd.

Aker Solutions ASA

Key Questions Answered

1. How big is the global Reversible Pump-Turbine market?
2. What is the demand of the global Reversible Pump-Turbine market?
3. What is the year over year growth of the global Reversible Pump-Turbine market?
4. What is the total value of the global Reversible Pump-Turbine market?
5. Who are the Major Players in the global Reversible Pump-Turbine market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Reversible Pump-Turbine Introduction
- 1.2 World Reversible Pump-Turbine Supply & Forecast
 - 1.2.1 World Reversible Pump-Turbine Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Reversible Pump-Turbine Production (2021-2032)
 - 1.2.3 World Reversible Pump-Turbine Pricing Trends (2021-2032)
- 1.3 World Reversible Pump-Turbine Production by Region (Based on Production Site)
 - 1.3.1 World Reversible Pump-Turbine Production Value by Region (2021-2032)
 - 1.3.2 World Reversible Pump-Turbine Production by Region (2021-2032)
 - 1.3.3 World Reversible Pump-Turbine Average Price by Region (2021-2032)
 - 1.3.4 North America Reversible Pump-Turbine Production (2021-2032)
 - 1.3.5 Europe Reversible Pump-Turbine Production (2021-2032)
 - 1.3.6 China Reversible Pump-Turbine Production (2021-2032)
 - 1.3.7 Japan Reversible Pump-Turbine Production (2021-2032)
 - 1.3.8 India Reversible Pump-Turbine Production (2021-2032)
 - 1.3.9 South Korea Reversible Pump-Turbine Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Reversible Pump-Turbine Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Reversible Pump-Turbine Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Reversible Pump-Turbine Demand (2021-2032)
- 2.2 World Reversible Pump-Turbine Consumption by Region
 - 2.2.1 World Reversible Pump-Turbine Consumption by Region (2021-2026)
 - 2.2.2 World Reversible Pump-Turbine Consumption Forecast by Region (2027-2032)
- 2.3 United States Reversible Pump-Turbine Consumption (2021-2032)
- 2.4 China Reversible Pump-Turbine Consumption (2021-2032)
- 2.5 Europe Reversible Pump-Turbine Consumption (2021-2032)
- 2.6 Japan Reversible Pump-Turbine Consumption (2021-2032)
- 2.7 South Korea Reversible Pump-Turbine Consumption (2021-2032)
- 2.8 ASEAN Reversible Pump-Turbine Consumption (2021-2032)
- 2.9 India Reversible Pump-Turbine Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Reversible Pump-Turbine Production Value by Manufacturer (2021-2026)
- 3.2 World Reversible Pump-Turbine Production by Manufacturer (2021-2026)
- 3.3 World Reversible Pump-Turbine Average Price by Manufacturer (2021-2026)
- 3.4 Reversible Pump-Turbine Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Reversible Pump-Turbine Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Reversible Pump-Turbine in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Reversible Pump-Turbine in 2025
- 3.6 Reversible Pump-Turbine Market: Overall Company Footprint Analysis
 - 3.6.1 Reversible Pump-Turbine Market: Region Footprint
 - 3.6.2 Reversible Pump-Turbine Market: Company Product Type Footprint
 - 3.6.3 Reversible Pump-Turbine Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Reversible Pump-Turbine Production Value Comparison
 - 4.1.1 United States VS China: Reversible Pump-Turbine Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Reversible Pump-Turbine Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Reversible Pump-Turbine Production Comparison
 - 4.2.1 United States VS China: Reversible Pump-Turbine Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Reversible Pump-Turbine Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Reversible Pump-Turbine Consumption Comparison
 - 4.3.1 United States VS China: Reversible Pump-Turbine Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Reversible Pump-Turbine Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Reversible Pump-Turbine Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Reversible Pump-Turbine Production Value (2021-2026)

4.4.3 United States Based Manufacturers Reversible Pump-Turbine Production (2021-2026)

4.5 China Based Reversible Pump-Turbine Manufacturers and Market Share

4.5.1 China Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Reversible Pump-Turbine Production Value (2021-2026)

4.5.3 China Based Manufacturers Reversible Pump-Turbine Production (2021-2026)

4.6 Rest of World Based Reversible Pump-Turbine Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Reversible Pump-Turbine Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Reversible Pump-Turbine Production (2021-2026)

5 MARKET ANALYSIS BY HYDRAULIC DESIGN

5.1 World Reversible Pump-Turbine Market Size Overview by Hydraulic Design: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Hydraulic Design

5.2.1 Reversible Francis Pump-Turbine

5.2.2 Reversible Deriaz Pump-Turbine

5.2.3 Reversible Axial-Flow Pump-Turbine

5.2.4 Others

5.3 Market Segment by Hydraulic Design

5.3.1 World Reversible Pump-Turbine Production by Hydraulic Design (2021-2032)

5.3.2 World Reversible Pump-Turbine Production Value by Hydraulic Design (2021-2032)

5.3.3 World Reversible Pump-Turbine Average Price by Hydraulic Design (2021-2032)

6 MARKET ANALYSIS BY SHAFT ORIENTATION

6.1 World Reversible Pump-Turbine Market Size Overview by Shaft Orientation: 2021

VS 2025 VS 2032

6.2 Segment Introduction by Shaft Orientation

6.2.1 Vertical-Shaft Pump-Turbine

6.2.2 Horizontal-Shaft Pump-Turbine

6.2.3 Others

6.3 Market Segment by Shaft Orientation

6.3.1 World Reversible Pump-Turbine Production by Shaft Orientation (2021-2032)

6.3.2 World Reversible Pump-Turbine Production Value by Shaft Orientation
(2021-2032)

6.3.3 World Reversible Pump-Turbine Average Price by Shaft Orientation (2021-2032)

7 MARKET ANALYSIS BY SPEED ARRANGEMENT

7.1 World Reversible Pump-Turbine Market Size Overview by Speed Arrangement:
2021 VS 2025 VS 2032

7.2 Segment Introduction by Speed Arrangement

7.2.1 Fixed-Speed Pump-Turbine

7.2.2 Variable-Speed Pump-Turbine

7.3 Market Segment by Speed Arrangement

7.3.1 World Reversible Pump-Turbine Production by Speed Arrangement (2021-2032)

7.3.2 World Reversible Pump-Turbine Production Value by Speed Arrangement
(2021-2032)

7.3.3 World Reversible Pump-Turbine Average Price by Speed Arrangement
(2021-2032)

8 MARKET ANALYSIS BY RATED UNIT OUTPUT

8.1 World Reversible Pump-Turbine Market Size Overview by Rated Unit Output: 2021
VS 2025 VS 2032

8.2 Segment Introduction by Rated Unit Output

8.2.1 Up to 100 MW

8.2.2 Above 100 MW to 300 MW

8.2.3 Above 300 MW to 500 MW

8.2.4 Above 500 MW

8.3 Market Segment by Rated Unit Output

8.3.1 World Reversible Pump-Turbine Production by Rated Unit Output (2021-2032)

8.3.2 World Reversible Pump-Turbine Production Value by Rated Unit Output
(2021-2032)

8.3.3 World Reversible Pump-Turbine Average Price by Rated Unit Output

(2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Reversible Pump-Turbine Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 New Large-Scale Pumped-Storage Plants

9.2.2 Distributed and Small-Scale Pumped Storage

9.2.3 Conversion of Conventional Hydropower Plants

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Reversible Pump-Turbine Production by Application (2021-2032)

9.3.2 World Reversible Pump-Turbine Production Value by Application (2021-2032)

9.3.3 World Reversible Pump-Turbine Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Voith GmbH & Co. KGaA

10.1.1 Voith GmbH & Co. KGaA Details

10.1.2 Voith GmbH & Co. KGaA Major Business

10.1.3 Voith GmbH & Co. KGaA Reversible Pump-Turbine Product and Services

10.1.4 Voith GmbH & Co. KGaA Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Voith GmbH & Co. KGaA Recent Developments/Updates

10.1.6 Voith GmbH & Co. KGaA Competitive Strengths & Weaknesses

10.2 ANDRITZ AG

10.2.1 ANDRITZ AG Details

10.2.2 ANDRITZ AG Major Business

10.2.3 ANDRITZ AG Reversible Pump-Turbine Product and Services

10.2.4 ANDRITZ AG Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 ANDRITZ AG Recent Developments/Updates

10.2.6 ANDRITZ AG Competitive Strengths & Weaknesses

10.3 GE Vernova Inc.

10.3.1 GE Vernova Inc. Details

10.3.2 GE Vernova Inc. Major Business

10.3.3 GE Vernova Inc. Reversible Pump-Turbine Product and Services

10.3.4 GE Vernova Inc. Reversible Pump-Turbine Production, Price, Value, Gross

Margin and Market Share (2021-2026)

10.3.5 GE Vernova Inc. Recent Developments/Updates

10.3.6 GE Vernova Inc. Competitive Strengths & Weaknesses

10.4 Harbin Electric Corporation

10.4.1 Harbin Electric Corporation Details

10.4.2 Harbin Electric Corporation Major Business

10.4.3 Harbin Electric Corporation Reversible Pump-Turbine Product and Services

10.4.4 Harbin Electric Corporation Reversible Pump-Turbine Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.4.5 Harbin Electric Corporation Recent Developments/Updates

10.4.6 Harbin Electric Corporation Competitive Strengths & Weaknesses

10.5 Dongfang Electric Corporation

10.5.1 Dongfang Electric Corporation Details

10.5.2 Dongfang Electric Corporation Major Business

10.5.3 Dongfang Electric Corporation Reversible Pump-Turbine Product and Services

10.5.4 Dongfang Electric Corporation Reversible Pump-Turbine Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.5.5 Dongfang Electric Corporation Recent Developments/Updates

10.5.6 Dongfang Electric Corporation Competitive Strengths & Weaknesses

10.6 Toshiba Corporation

10.6.1 Toshiba Corporation Details

10.6.2 Toshiba Corporation Major Business

10.6.3 Toshiba Corporation Reversible Pump-Turbine Product and Services

10.6.4 Toshiba Corporation Reversible Pump-Turbine Production, Price, Value, Gross

Margin and Market Share (2021-2026)

10.6.5 Toshiba Corporation Recent Developments/Updates

10.6.6 Toshiba Corporation Competitive Strengths & Weaknesses

10.7 Hitachi Mitsubishi Hydro Corporation

10.7.1 Hitachi Mitsubishi Hydro Corporation Details

10.7.2 Hitachi Mitsubishi Hydro Corporation Major Business

10.7.3 Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Product and Services

10.7.4 Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.7.5 Hitachi Mitsubishi Hydro Corporation Recent Developments/Updates

10.7.6 Hitachi Mitsubishi Hydro Corporation Competitive Strengths & Weaknesses

10.8 Zhefu Holding Group Co., Ltd.

10.8.1 Zhefu Holding Group Co., Ltd. Details

10.8.2 Zhefu Holding Group Co., Ltd. Major Business

- 10.8.3 Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Product and Services
- 10.8.4 Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.8.5 Zhefu Holding Group Co., Ltd. Recent Developments/Updates
- 10.8.6 Zhefu Holding Group Co., Ltd. Competitive Strengths & Weaknesses
- 10.9 Wikov Industry a.s.
 - 10.9.1 Wikov Industry a.s. Details
 - 10.9.2 Wikov Industry a.s. Major Business
 - 10.9.3 Wikov Industry a.s. Reversible Pump-Turbine Product and Services
 - 10.9.4 Wikov Industry a.s. Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 Wikov Industry a.s. Recent Developments/Updates
 - 10.9.6 Wikov Industry a.s. Competitive Strengths & Weaknesses
- 10.10 Power Machines PJSC
 - 10.10.1 Power Machines PJSC Details
 - 10.10.2 Power Machines PJSC Major Business
 - 10.10.3 Power Machines PJSC Reversible Pump-Turbine Product and Services
 - 10.10.4 Power Machines PJSC Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.10.5 Power Machines PJSC Recent Developments/Updates
 - 10.10.6 Power Machines PJSC Competitive Strengths & Weaknesses
- 10.11 Bharat Heavy Electricals Limited
 - 10.11.1 Bharat Heavy Electricals Limited Details
 - 10.11.2 Bharat Heavy Electricals Limited Major Business
 - 10.11.3 Bharat Heavy Electricals Limited Reversible Pump-Turbine Product and Services
 - 10.11.4 Bharat Heavy Electricals Limited Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.11.5 Bharat Heavy Electricals Limited Recent Developments/Updates
 - 10.11.6 Bharat Heavy Electricals Limited Competitive Strengths & Weaknesses
- 10.12 IMPSA S.A.
 - 10.12.1 IMPSA S.A. Details
 - 10.12.2 IMPSA S.A. Major Business
 - 10.12.3 IMPSA S.A. Reversible Pump-Turbine Product and Services
 - 10.12.4 IMPSA S.A. Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.12.5 IMPSA S.A. Recent Developments/Updates
 - 10.12.6 IMPSA S.A. Competitive Strengths & Weaknesses
- 10.13 Doosan Enerbility Co., Ltd.

- 10.13.1 Doosan Enerbility Co., Ltd. Details
- 10.13.2 Doosan Enerbility Co., Ltd. Major Business
- 10.13.3 Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Product and Services
- 10.13.4 Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.13.5 Doosan Enerbility Co., Ltd. Recent Developments/Updates
- 10.13.6 Doosan Enerbility Co., Ltd. Competitive Strengths & Weaknesses
- 10.14 Aker Solutions ASA
 - 10.14.1 Aker Solutions ASA Details
 - 10.14.2 Aker Solutions ASA Major Business
 - 10.14.3 Aker Solutions ASA Reversible Pump-Turbine Product and Services
 - 10.14.4 Aker Solutions ASA Reversible Pump-Turbine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.14.5 Aker Solutions ASA Recent Developments/Updates
 - 10.14.6 Aker Solutions ASA Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 Reversible Pump-Turbine Industry Chain
- 11.2 Reversible Pump-Turbine Upstream Analysis
 - 11.2.1 Reversible Pump-Turbine Core Raw Materials
 - 11.2.2 Main Manufacturers of Reversible Pump-Turbine Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Reversible Pump-Turbine Production Mode
- 11.6 Reversible Pump-Turbine Procurement Model
- 11.7 Reversible Pump-Turbine Industry Sales Model and Sales Channels
 - 11.7.1 Reversible Pump-Turbine Sales Model
 - 11.7.2 Reversible Pump-Turbine Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Reversible Pump-Turbine Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Reversible Pump-Turbine Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Reversible Pump-Turbine Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Reversible Pump-Turbine Production Value Market Share by Region (2021-2026)
- Table 5. World Reversible Pump-Turbine Production Value Market Share by Region (2027-2032)
- Table 6. World Reversible Pump-Turbine Production by Region (2021-2026) & (Units)
- Table 7. World Reversible Pump-Turbine Production by Region (2027-2032) & (Units)
- Table 8. World Reversible Pump-Turbine Production Market Share by Region (2021-2026)
- Table 9. World Reversible Pump-Turbine Production Market Share by Region (2027-2032)
- Table 10. World Reversible Pump-Turbine Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 11. World Reversible Pump-Turbine Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 12. Reversible Pump-Turbine Major Market Trends
- Table 13. World Reversible Pump-Turbine Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World Reversible Pump-Turbine Consumption by Region (2021-2026) & (Units)
- Table 15. World Reversible Pump-Turbine Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World Reversible Pump-Turbine Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Reversible Pump-Turbine Producers in 2025
- Table 18. World Reversible Pump-Turbine Production by Manufacturer (2021-2026) & (Units)
- Table 19. Production Market Share of Key Reversible Pump-Turbine Producers in 2025
- Table 20. World Reversible Pump-Turbine Average Price by Manufacturer (2021-2026)

& (K US\$/Unit)

Table 21. Global Reversible Pump-Turbine Company Evaluation Quadrant

Table 22. World Reversible Pump-Turbine Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Reversible Pump-Turbine Production Site of Key Manufacturer

Table 24. Reversible Pump-Turbine Market: Company Product Type Footprint

Table 25. Reversible Pump-Turbine Market: Company Product Application Footprint

Table 26. Reversible Pump-Turbine Competitive Factors

Table 27. Reversible Pump-Turbine New Entrant and Capacity Expansion Plans

Table 28. Reversible Pump-Turbine Mergers & Acquisitions Activity

Table 29. United States VS China Reversible Pump-Turbine Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Reversible Pump-Turbine Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Reversible Pump-Turbine Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Reversible Pump-Turbine Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Reversible Pump-Turbine Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Reversible Pump-Turbine Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Reversible Pump-Turbine Production Market Share (2021-2026)

Table 37. China Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Reversible Pump-Turbine Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Reversible Pump-Turbine Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Reversible Pump-Turbine Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Reversible Pump-Turbine Production Market Share (2021-2026)

Table 42. Rest of World Based Reversible Pump-Turbine Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Reversible Pump-Turbine Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Reversible Pump-Turbine Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Reversible Pump-Turbine Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Reversible Pump-Turbine Production Market Share (2021-2026)

Table 47. World Reversible Pump-Turbine Production Value by Hydraulic Design, (USD Million), 2021 & 2025 & 2032

Table 48. World Reversible Pump-Turbine Production by Hydraulic Design (2021-2026) & (Units)

Table 49. World Reversible Pump-Turbine Production by Hydraulic Design (2027-2032) & (Units)

Table 50. World Reversible Pump-Turbine Production Value by Hydraulic Design (2021-2026) & (USD Million)

Table 51. World Reversible Pump-Turbine Production Value by Hydraulic Design (2027-2032) & (USD Million)

Table 52. World Reversible Pump-Turbine Average Price by Hydraulic Design (2021-2026) & (K US\$/Unit)

Table 53. World Reversible Pump-Turbine Average Price by Hydraulic Design (2027-2032) & (K US\$/Unit)

Table 54. World Reversible Pump-Turbine Production Value by Shaft Orientation, (USD Million), 2021 & 2025 & 2032

Table 55. World Reversible Pump-Turbine Production by Shaft Orientation (2021-2026) & (Units)

Table 56. World Reversible Pump-Turbine Production by Shaft Orientation (2027-2032) & (Units)

Table 57. World Reversible Pump-Turbine Production Value by Shaft Orientation (2021-2026) & (USD Million)

Table 58. World Reversible Pump-Turbine Production Value by Shaft Orientation (2027-2032) & (USD Million)

Table 59. World Reversible Pump-Turbine Average Price by Shaft Orientation (2021-2026) & (K US\$/Unit)

Table 60. World Reversible Pump-Turbine Average Price by Shaft Orientation (2027-2032) & (K US\$/Unit)

Table 61. World Reversible Pump-Turbine Production Value by Speed Arrangement, (USD Million), 2021 & 2025 & 2032

Table 62. World Reversible Pump-Turbine Production by Speed Arrangement

(2021-2026) & (Units)

Table 63. World Reversible Pump-Turbine Production by Speed Arrangement

(2027-2032) & (Units)

Table 64. World Reversible Pump-Turbine Production Value by Speed Arrangement

(2021-2026) & (USD Million)

Table 65. World Reversible Pump-Turbine Production Value by Speed Arrangement

(2027-2032) & (USD Million)

Table 66. World Reversible Pump-Turbine Average Price by Speed Arrangement

(2021-2026) & (K US\$/Unit)

Table 67. World Reversible Pump-Turbine Average Price by Speed Arrangement

(2027-2032) & (K US\$/Unit)

Table 68. World Reversible Pump-Turbine Production Value by Rated Unit Output,
(USD Million), 2021 & 2025 & 2032

Table 69. World Reversible Pump-Turbine Production by Rated Unit Output

(2021-2026) & (Units)

Table 70. World Reversible Pump-Turbine Production by Rated Unit Output

(2027-2032) & (Units)

Table 71. World Reversible Pump-Turbine Production Value by Rated Unit Output

(2021-2026) & (USD Million)

Table 72. World Reversible Pump-Turbine Production Value by Rated Unit Output

(2027-2032) & (USD Million)

Table 73. World Reversible Pump-Turbine Average Price by Rated Unit Output

(2021-2026) & (K US\$/Unit)

Table 74. World Reversible Pump-Turbine Average Price by Rated Unit Output

(2027-2032) & (K US\$/Unit)

Table 75. World Reversible Pump-Turbine Production Value by Application, (USD
Million), 2021 & 2025 & 2032

Table 76. World Reversible Pump-Turbine Production by Application (2021-2026) &
(Units)

Table 77. World Reversible Pump-Turbine Production by Application (2027-2032) &
(Units)

Table 78. World Reversible Pump-Turbine Production Value by Application (2021-2026)
& (USD Million)

Table 79. World Reversible Pump-Turbine Production Value by Application (2027-2032)
& (USD Million)

Table 80. World Reversible Pump-Turbine Average Price by Application (2021-2026) &
(K US\$/Unit)

Table 81. World Reversible Pump-Turbine Average Price by Application (2027-2032) &
(K US\$/Unit)

Table 82. Voith GmbH & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 83. Voith GmbH & Co. KGaA Major Business

Table 84. Voith GmbH & Co. KGaA Reversible Pump-Turbine Product and Services

Table 85. Voith GmbH & Co. KGaA Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Voith GmbH & Co. KGaA Recent Developments/Updates

Table 87. Voith GmbH & Co. KGaA Competitive Strengths & Weaknesses

Table 88. ANDRITZ AG Basic Information, Manufacturing Base and Competitors

Table 89. ANDRITZ AG Major Business

Table 90. ANDRITZ AG Reversible Pump-Turbine Product and Services

Table 91. ANDRITZ AG Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. ANDRITZ AG Recent Developments/Updates

Table 93. ANDRITZ AG Competitive Strengths & Weaknesses

Table 94. GE Vernova Inc. Basic Information, Manufacturing Base and Competitors

Table 95. GE Vernova Inc. Major Business

Table 96. GE Vernova Inc. Reversible Pump-Turbine Product and Services

Table 97. GE Vernova Inc. Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. GE Vernova Inc. Recent Developments/Updates

Table 99. GE Vernova Inc. Competitive Strengths & Weaknesses

Table 100. Harbin Electric Corporation Basic Information, Manufacturing Base and Competitors

Table 101. Harbin Electric Corporation Major Business

Table 102. Harbin Electric Corporation Reversible Pump-Turbine Product and Services

Table 103. Harbin Electric Corporation Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Harbin Electric Corporation Recent Developments/Updates

Table 105. Harbin Electric Corporation Competitive Strengths & Weaknesses

Table 106. Dongfang Electric Corporation Basic Information, Manufacturing Base and Competitors

Table 107. Dongfang Electric Corporation Major Business

Table 108. Dongfang Electric Corporation Reversible Pump-Turbine Product and Services

Table 109. Dongfang Electric Corporation Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Dongfang Electric Corporation Recent Developments/Updates

Table 111. Dongfang Electric Corporation Competitive Strengths & Weaknesses

Table 112. Toshiba Corporation Basic Information, Manufacturing Base and Competitors

Table 113. Toshiba Corporation Major Business

Table 114. Toshiba Corporation Reversible Pump-Turbine Product and Services

Table 115. Toshiba Corporation Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Toshiba Corporation Recent Developments/Updates

Table 117. Toshiba Corporation Competitive Strengths & Weaknesses

Table 118. Hitachi Mitsubishi Hydro Corporation Basic Information, Manufacturing Base and Competitors

Table 119. Hitachi Mitsubishi Hydro Corporation Major Business

Table 120. Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Product and Services

Table 121. Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Hitachi Mitsubishi Hydro Corporation Recent Developments/Updates

Table 123. Hitachi Mitsubishi Hydro Corporation Competitive Strengths & Weaknesses

Table 124. Zhefu Holding Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 125. Zhefu Holding Group Co., Ltd. Major Business

Table 126. Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Product and Services

Table 127. Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Zhefu Holding Group Co., Ltd. Recent Developments/Updates

Table 129. Zhefu Holding Group Co., Ltd. Competitive Strengths & Weaknesses

Table 130. Wikov Industry a.s. Basic Information, Manufacturing Base and Competitors

Table 131. Wikov Industry a.s. Major Business

Table 132. Wikov Industry a.s. Reversible Pump-Turbine Product and Services

Table 133. Wikov Industry a.s. Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 134. Wikov Industry a.s. Recent Developments/Updates

Table 135. Wikov Industry a.s. Competitive Strengths & Weaknesses

Table 136. Power Machines PJSC Basic Information, Manufacturing Base and Competitors

Table 137. Power Machines PJSC Major Business

Table 138. Power Machines PJSC Reversible Pump-Turbine Product and Services

Table 139. Power Machines PJSC Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Power Machines PJSC Recent Developments/Updates

Table 141. Power Machines PJSC Competitive Strengths & Weaknesses

Table 142. Bharat Heavy Electricals Limited Basic Information, Manufacturing Base and Competitors

Table 143. Bharat Heavy Electricals Limited Major Business

Table 144. Bharat Heavy Electricals Limited Reversible Pump-Turbine Product and Services

Table 145. Bharat Heavy Electricals Limited Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Bharat Heavy Electricals Limited Recent Developments/Updates

Table 147. Bharat Heavy Electricals Limited Competitive Strengths & Weaknesses

Table 148. IMPSA S.A. Basic Information, Manufacturing Base and Competitors

Table 149. IMPSA S.A. Major Business

Table 150. IMPSA S.A. Reversible Pump-Turbine Product and Services

Table 151. IMPSA S.A. Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. IMPSA S.A. Recent Developments/Updates

Table 153. IMPSA S.A. Competitive Strengths & Weaknesses

Table 154. Doosan Enerbility Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 155. Doosan Enerbility Co., Ltd. Major Business

Table 156. Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Product and Services

Table 157. Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Doosan Enerbility Co., Ltd. Recent Developments/Updates

Table 159. Doosan Enerbility Co., Ltd. Competitive Strengths & Weaknesses

Table 160. Aker Solutions ASA Basic Information, Manufacturing Base and Competitors

Table 161. Aker Solutions ASA Major Business

Table 162. Aker Solutions ASA Reversible Pump-Turbine Product and Services

Table 163. Aker Solutions ASA Reversible Pump-Turbine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Aker Solutions ASA Recent Developments/Updates

Table 165. Aker Solutions ASA Competitive Strengths & Weaknesses

Table 166. Global Key Players of Reversible Pump-Turbine Upstream (Raw Materials)

Table 167. Global Reversible Pump-Turbine Typical Customers

Table 168. Reversible Pump-Turbine Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Reversible Pump-Turbine Picture

Figure 2. World Reversible Pump-Turbine Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Reversible Pump-Turbine Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 5. World Reversible Pump-Turbine Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Reversible Pump-Turbine Production Value Market Share by Region (2021-2032)

Figure 7. World Reversible Pump-Turbine Production Market Share by Region (2021-2032)

Figure 8. North America Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 9. Europe Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 10. China Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 11. Japan Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 12. India Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 13. South Korea Reversible Pump-Turbine Production (2021-2032) & (Units)

Figure 14. Reversible Pump-Turbine Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 17. World Reversible Pump-Turbine Consumption Market Share by Region (2021-2032)

Figure 18. United States Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 19. China Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 20. Europe Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 21. Japan Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 22. South Korea Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 23. ASEAN Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 24. India Reversible Pump-Turbine Consumption (2021-2032) & (Units)

Figure 25. Producer Shipments of Reversible Pump-Turbine by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Reversible Pump-Turbine Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Reversible Pump-Turbine Markets in 2025

Figure 28. United States VS China: Reversible Pump-Turbine Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Reversible Pump-Turbine Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Reversible Pump-Turbine Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Reversible Pump-Turbine Production Market Share 2025

Figure 32. China Based Manufacturers Reversible Pump-Turbine Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Reversible Pump-Turbine Production Market Share 2025

Figure 34. World Reversible Pump-Turbine Production Value by Hydraulic Design, (USD Million), 2021 & 2025 & 2032

Figure 35. World Reversible Pump-Turbine Production Value Market Share by Hydraulic Design in 2025

Figure 36. Reversible Francis Pump-Turbine

Figure 37. Reversible Deriaz Pump-Turbine

Figure 38. Reversible Axial-Flow Pump-Turbine

Figure 39. Others

Figure 40. World Reversible Pump-Turbine Production Market Share by Hydraulic Design (2021-2032)

Figure 41. World Reversible Pump-Turbine Production Value Market Share by Hydraulic Design (2021-2032)

Figure 42. World Reversible Pump-Turbine Average Price by Hydraulic Design (2021-2032) & (K US\$/Unit)

Figure 43. World Reversible Pump-Turbine Production Value by Shaft Orientation, (USD Million), 2021 & 2025 & 2032

Figure 44. World Reversible Pump-Turbine Production Value Market Share by Shaft Orientation in 2025

Figure 45. Vertical-Shaft Pump-Turbine

Figure 46. Horizontal-Shaft Pump-Turbine

Figure 47. Others

Figure 48. World Reversible Pump-Turbine Production Market Share by Shaft Orientation (2021-2032)

Figure 49. World Reversible Pump-Turbine Production Value Market Share by Shaft Orientation (2021-2032)

Figure 50. World Reversible Pump-Turbine Average Price by Shaft Orientation (2021-2032) & (K US\$/Unit)

Figure 51. World Reversible Pump-Turbine Production Value by Speed Arrangement, (USD Million), 2021 & 2025 & 2032

Figure 52. World Reversible Pump-Turbine Production Value Market Share by Speed Arrangement in 2025

Figure 53. Fixed-Speed Pump-Turbine

Figure 54. Variable-Speed Pump-Turbine

Figure 55. World Reversible Pump-Turbine Production Market Share by Speed Arrangement (2021-2032)

Figure 56. World Reversible Pump-Turbine Production Value Market Share by Speed Arrangement (2021-2032)

Figure 57. World Reversible Pump-Turbine Average Price by Speed Arrangement (2021-2032) & (K US\$/Unit)

Figure 58. World Reversible Pump-Turbine Production Value by Rated Unit Output, (USD Million), 2021 & 2025 & 2032

Figure 59. World Reversible Pump-Turbine Production Value Market Share by Rated Unit Output in 2025

Figure 60. Up to 100 MW

Figure 61. Above 100 MW to 300 MW

Figure 62. Above 300 MW to 500 MW

Figure 63. Above 500 MW

Figure 64. World Reversible Pump-Turbine Production Market Share by Rated Unit Output (2021-2032)

Figure 65. World Reversible Pump-Turbine Production Value Market Share by Rated Unit Output (2021-2032)

Figure 66. World Reversible Pump-Turbine Average Price by Rated Unit Output (2021-2032) & (K US\$/Unit)

Figure 67. World Reversible Pump-Turbine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 68. World Reversible Pump-Turbine Production Value Market Share by Application in 2025

Figure 69. New Large-Scale Pumped-Storage Plants

Figure 70. Distributed and Small-Scale Pumped Storage

Figure 71. Conversion of Conventional Hydropower Plants

Figure 72. Others

Figure 73. World Reversible Pump-Turbine Production Market Share by Application (2021-2032)

Figure 74. World Reversible Pump-Turbine Production Value Market Share by Application (2021-2032)

Figure 75. World Reversible Pump-Turbine Average Price by Application (2021-2032) &

(K US\$/Unit)

Figure 76. Reversible Pump-Turbine Industry Chain

Figure 77. Reversible Pump-Turbine Procurement Model

Figure 78. Reversible Pump-Turbine Sales Model

Figure 79. Reversible Pump-Turbine Sales Channels, Direct Sales, and Distribution

Figure 80. Methodology

Figure 81. Research Process and Data Source

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