

Global Reversible Pump-Turbine 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 Reversible Pump-Turbine market size was valued at US\$ 2358 million in 2025 and is forecast to a readjusted size of US\$ 3853 million by 2032 with a CAGR of 7.2% during review period.

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 is a detailed and comprehensive analysis for global Reversible Pump-Turbine market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Hydraulic Design 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 Reversible Pump-Turbine market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

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

Global Reversible Pump-Turbine market size and forecasts, by Hydraulic Design and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Reversible Pump-Turbine 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 Reversible Pump-Turbine

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 Reversible Pump-Turbine 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 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.

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

Market Segmentation

Market segment by Hydraulic Design

Reversible Francis Pump-Turbine

Reversible Deriaz Pump-Turbine

Reversible Axial-Flow Pump-Turbine

Others

Market segment by Shaft Orientation

Vertical-Shaft Pump-Turbine

Horizontal-Shaft Pump-Turbine

Others

Market segment by Speed Arrangement

Fixed-Speed Pump-Turbine

Variable-Speed Pump-Turbine

Market segment by Rated Unit Output

Up to 100 MW

Above 100 MW to 300 MW

Above 300 MW to 500 MW

Above 500 MW

Market segment by Application

New Large-Scale Pumped-Storage Plants

Distributed and Small-Scale Pumped Storage

Conversion of Conventional Hydropower Plants

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

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

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

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

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

Chapter Outline

Chapter 1, to describe Reversible Pump-Turbine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Reversible Pump-Turbine, with price, sales quantity, revenue, and global market share of Reversible Pump-Turbine from 2021 to 2026.

Chapter 3, the Reversible Pump-Turbine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Reversible Pump-Turbine 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 Hydraulic Design and by Application, with sales market share and growth rate by Hydraulic Design, 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 Reversible Pump-Turbine market forecast, by regions, by Hydraulic Design, 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 Reversible Pump-Turbine.

Chapter 14 and 15, to describe Reversible Pump-Turbine sales channel, distributors, customers, research findings and conclusion.

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