

Global Supercritical Once-through Boiler Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Supercritical Once-through Boiler market size is expected to reach \$ 10112 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

Supercritical Once-through Boiler refers to a high-efficiency utility steam generator operating above the critical pressure of water, generally at main steam pressures exceeding approximately 22.1 MPa, in which feedwater passes continuously through the economizer, furnace water-wall or evaporative heating surfaces and superheater without relying on a conventional steam drum for continuous water-steam separation. Once-through architecture enables operation at higher steam pressures and temperatures than conventional subcritical drum boilers and is particularly suited to large power-generation units requiring high thermal efficiency and flexible pressure operation. Mitsubishi Power identifies once-through boilers as capable of producing steam at higher pressures and temperatures than drum boilers, while Babcock & Wilcox applies its supercritical once-through boiler designs primarily to power systems of approximately 400 MW and above. Commercial systems span supercritical, advanced supercritical and ultra-supercritical steam conditions and can incorporate pulverized-coal, circulating fluidized bed and other suitable furnace configurations. The research scope focuses on complete supercritical once-through boiler systems and major steam-generator packages used in utility, captive power, cogeneration and other large thermal power plants where fuel efficiency, steam-condition control, high output and lower emissions per unit of electricity are key operating requirements.

Key Findings

Once-through architecture eliminates the conventional steam drum and supports higher steam pressure and temperature operation

Large 600–1,000 MW units represent a major commercial range for modern supercritical and ultra-supercritical boiler installations

Coal-fired utility power plants remain the principal application for large supercritical once-through boiler systems

Asia accounts for the majority of new-build demand, supported primarily by China, India and other electricity-growth markets

Competition centers on steam parameters, thermal efficiency, cycling capability, material durability and long-term power-plant reliability

Market Trends

The Supercritical Once-through Boiler industry is shifting from conventional supercritical designs toward higher-temperature ultra-supercritical systems, more flexible load-following operation and improved compatibility with power systems containing larger shares of renewable generation. Once-through technology is fundamentally suited to high steam conditions because the absence of a steam drum allows the boiler to operate across supercritical parameters while supporting variable-pressure control. Mitsubishi Power has accumulated extensive commercial experience in supercritical and ultra-supercritical once-through boilers, while Babcock & Wilcox continues to offer Universal Pressure, Spiral Wound Universal Pressure and Vertical Tube Universal Pressure designs for supercritical applications. Materials technology is increasingly important as higher pressure and temperature impose more demanding creep, oxidation and thermal-fatigue requirements on water walls, superheaters, reheaters and headers. At the same time, operating priorities are changing. Large coal-fired units historically optimized for baseload generation increasingly require lower minimum loads, faster ramp rates and more frequent cycling as solar and wind generation expand. The IEA reports that renewable generation reached near parity with coal globally in 2025 and is expected to overtake coal-fired generation in 2026, reinforcing the need for thermal plants that remain in operation to provide greater dispatch flexibility.

Market Dynamics

Drivers

Demand is supported by electricity consumption growth in emerging markets, replacement of lower-efficiency subcritical capacity and continued construction of high-efficiency coal-fired units in regions where coal remains important for power-system reliability and energy security. Supercritical once-through boilers provide higher steam conditions and improved thermal efficiency compared with conventional subcritical drum boilers, reducing fuel consumption and emissions intensity per unit of electricity generated. Mitsubishi Power explicitly positions higher steam pressure and temperature as a principal advantage of once-through technology, while BHEL currently lists manufacturing capability for supercritical boilers up to 1,000 MW unit size. Coal demand remains heavily concentrated in Asia: the IEA reports that China and India accounted for 71% of global coal consumption in 2025-related analysis, reinforcing the regional concentration of the addressable market for high-efficiency coal power equipment.

Restraints

The primary restraint is the structural slowdown in new coal-fired generation across many developed electricity markets as investment shifts toward renewable energy, nuclear generation, storage and lower-carbon flexible capacity. The IEA expects coal's share of global electricity generation to decline from approximately 34% in 2025 to 27% by 2030 as renewable and nuclear output expands. Supercritical once-through projects also require substantial capital investment, long construction and commissioning cycles, sophisticated water chemistry, advanced alloy materials and highly engineered boiler-control systems. Their large scale limits adoption mainly to major utilities and industrial power projects. Environmental permitting, financing restrictions and carbon-reduction policies can delay or cancel new coal projects, particularly in Europe and other mature markets, creating a market increasingly dependent on a smaller number of Asian and emerging economies.

Opportunities

Market opportunities are concentrated in ultra-supercritical replacement projects, efficiency upgrades, advanced CFB configurations and highly flexible large thermal units designed to complement variable renewable generation. Aging subcritical fleets in selected markets create opportunities to replace older units with higher-efficiency

supercritical or ultra-supercritical technology where electricity demand and fuel availability justify continued thermal generation. BHEL has manufacturing capability for utility boilers with supercritical parameters up to 1,000 MW and supercritical CFB steam generators up to 660 MW, while Sumitomo SHI FW technology has demonstrated once-through supercritical CFB applications at large power plants. Another opportunity is operational modernization of existing units through advanced control, burner upgrades, pressure-part replacement and flexible-operation modifications. As thermal plants increasingly shift from constant baseload to balancing roles, boiler manufacturers with both new-build engineering and lifecycle service capabilities can capture value across the full operating life of the asset.

Challenges

The principal technical challenge is maintaining reliability under extreme steam conditions and increasingly frequent load cycling. Higher-temperature superheaters, reheaters, furnace walls and headers are exposed to long-term creep, thermal fatigue, oxidation and corrosion, while repeated startups and rapid load changes increase temperature gradients and mechanical stress. Babcock & Wilcox notes that superheater and reheater tubes are subject to creep-related degradation during long-term high-temperature operation. Once-through boilers additionally require highly accurate feedwater control and water chemistry because there is no large steam drum acting as a buffer against impurities or transient operating conditions. Manufacturers must therefore balance higher efficiency with pressure-part durability, combustion stability, emissions performance and increasingly demanding flexible-operation requirements. Supply-chain availability of advanced heat-resistant steels and large precision pressure components can also affect project schedules and manufacturing costs.

Industry Chain Analysis

The upstream industry comprises high-temperature alloy steel tubes, seamless boiler tubes, plates, forgings, headers, structural steel, refractory and insulation materials, burners, coal mills, fans, valves, pumps, instrumentation and distributed control systems. Material performance is particularly critical for superheaters, reheaters and other high-temperature pressure parts because higher steam conditions require strong creep resistance and long design life. The midstream consists of boiler OEMs and specialized manufacturing plants responsible for thermal design, furnace engineering, water-wall fabrication, superheater and reheater manufacturing, headers, economizers,

combustion systems, structural modules, controls, factory testing and site integration. Mitsubishi Power, Babcock & Wilcox, Doosan Enerbility and BHEL all maintain direct supercritical or once-through boiler engineering capabilities; Doosan states that it has designed and manufactured drum, once-through and CFB boilers across subcritical and supercritical conditions. Downstream customers are primarily electric utilities, independent power producers, state-owned generation companies and large industrial users. Value creation depends on thermal efficiency, equipment availability, plant flexibility, fuel adaptability, lifecycle service and the ability to meet increasingly stringent environmental requirements.

Segment Insights

By steam parameter, conventional supercritical systems operating above the water critical pressure remain an important installed and new-build category, while advanced supercritical and ultra-supercritical systems are increasingly preferred for large modern projects because higher steam pressure and temperature can further improve plant efficiency. The technology threshold is not determined solely by pressure: commercial boiler design must coordinate main and reheat steam temperature, furnace heat absorption, materials selection and turbine requirements. By furnace type, pulverized-coal boilers represent the principal configuration for large 600–1,000 MW class utility plants, while circulating fluidized bed technology provides advantages where fuel flexibility and in-furnace emissions control are important. BHEL currently lists supercritical CFB units from 151 MW to 660 MW, demonstrating that once-through supercritical technology is no longer limited to conventional pulverized-coal furnaces. By unit capacity, the market is concentrated in large units. Babcock & Wilcox states that its supercritical once-through designs are generally applied at approximately 400 MW and above, while major Asian manufacturers have developed 660 MW, 800 MW and 1,000 MW class products. The move toward larger unit ratings reflects economies of scale and the efficiency advantages available from advanced steam conditions.

Downstream Market Opportunities

Coal-fired utility power plants remain the principal downstream market because supercritical once-through technology was developed primarily to improve the efficiency of large central-station thermal generation. The most attractive opportunities are increasingly concentrated in countries where electricity demand continues to rise rapidly and coal remains an important domestic or energy-security resource. China and India remain structurally important because together they account for the majority of global

coal consumption, while selected Southeast Asian markets continue to operate and develop large thermal fleets. Captive industrial power and cogeneration represent smaller opportunities where large process industries require reliable high-pressure steam and electricity, although unit capacities are typically lower than those of utility projects. Oil- and gas-fired once-through boilers and biomass or alternative-fuel applications form specialized niches, while supercritical CFB systems create opportunities for lower-grade coal, lignite and diverse fuel portfolios where fuel flexibility is a central purchasing criterion.

Regional Insights

Asia is the dominant region for Supercritical Once-through Boiler manufacturing and new-project activity. China possesses a mature domestic equipment ecosystem led by major boiler manufacturers associated with Dongfang Electric, Harbin Electric and Shanghai Electric, while India continues to expand supercritical generating capacity using domestically manufactured equipment from BHEL. BHEL currently markets supercritical boilers up to 1,000 MW and has supplied or commissioned multiple 660 MW and 800 MW thermal units. Korea and Japan retain advanced engineering capabilities through Doosan Enerbility and Mitsubishi Power, supported by decades of large once-through and ultra-supercritical boiler experience. North America and Europe have comparatively limited new coal-boiler demand and are more heavily oriented toward installed-base service, life extension, fuel conversion and performance upgrades. The regional market therefore exhibits a pronounced divergence: new equipment opportunities are concentrated in Asia and selected emerging economies, while mature economies generate a larger proportion of aftermarket and modernization revenue.

Competitive Landscape Analysis

The competitive landscape is highly concentrated from a technology standpoint because large supercritical once-through boilers require extensive thermal-design expertise, pressure-part manufacturing capability, advanced materials engineering and decades of operating references. Mitsubishi Power and Babcock & Wilcox possess established proprietary once-through boiler platforms, while Doosan Enerbility has independently designed and manufactured supercritical once-through units. In Asia, Dongfang Electric, Harbin Electric and etc. represent major domestic heavy-equipment suppliers serving large utility projects, while BHI and Sofinter/AC Boilers participate in

selected large boiler and power-generation applications. Competitive differentiation is based less on standardized product pricing than on guaranteed heat rate, steam conditions, unit availability, coal adaptability, emissions performance, material life, load-following capability, project execution and lifecycle service. As global new coal capacity becomes more regionally concentrated, local manufacturing content, financing compatibility and established utility relationships are likely to become increasingly important alongside core boiler technology.

Report Scope

This report studies the global Supercritical Once-through Boiler production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Supercritical Once-through Boiler 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 Supercritical Once-through Boiler that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Supercritical Once-through Boiler total production and demand, 2021-2032, (Units)

Global Supercritical Once-through Boiler total production value, 2021-2032, (USD Million)

Global Supercritical Once-through Boiler production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Supercritical Once-through Boiler consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Supercritical Once-through Boiler domestic production, consumption, key domestic manufacturers and share

Global Supercritical Once-through Boiler production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Supercritical Once-through Boiler production by Steam Parameters, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Supercritical Once-through Boiler production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Supercritical Once-through Boiler 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 Mitsubishi Power, Babcock & Wilcox, Doosan Enerbility, Dongfang Electric (Dongfang Boiler), Shanghai Electric, Bharat Heavy Electricals Limited (BHEL), Harbin Electric, BHI Co., Ltd., Sofinter (AC Boilers), 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 Supercritical Once-through Boiler market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Steam Parameters, 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 Supercritical Once-through Boiler Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Supercritical Once-through Boiler Market, Segmentation by Steam Parameters:

Supercritical Grade (22.1–25 MPa)

Advanced Supercritical Grade (>25–30 MPa)

Ultra-supercritical Grade (>30 MPa)

Global Supercritical Once-through Boiler Market, Segmentation by Furnace Type:

Pulverized Coal-fired Boiler

Circulating Fluidized Bed Boiler

Oil and Gas-fired Boiler

Others

Global Supercritical Once-through Boiler Market, Segmentation by Unit Capacity:

Medium-capacity Unit (300–600 MW)

Large-capacity Unit (600–800 MW)

Ultra-large-capacity Unit (800–1,000 MW)

Gigawatt-class Unit (>1,000 MW)

Global Supercritical Once-through Boiler Market, Segmentation by Application:

Coal-fired Utility Power Plants

Captive and Industrial Power Plants

Combined Heat and Power Plants

Oil and Gas-fired Power Plants

Biomass and Alternative Fuel Power Plants

Others

Companies Profiled:

Mitsubishi Power

Babcock & Wilcox

Doosan Enerbility

Dongfang Electric (Dongfang Boiler)

Shanghai Electric

Bharat Heavy Electricals Limited (BHEL)

Harbin Electric

BHI Co., Ltd.

Sofinter (AC Boilers)

Key Questions Answered

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

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