

Global Supercritical Once-through Boiler 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 Supercritical Once-through Boiler market size was valued at US\$ 7668 million in 2025 and is forecast to a readjusted size of US\$ 10112 million by 2032 with a CAGR of 4.0% during review period.

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 is a detailed and comprehensive analysis for global Supercritical Once-through Boiler market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Steam Parameters 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 Supercritical Once-through Boiler market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Supercritical Once-through Boiler market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Supercritical Once-through Boiler market size and forecasts, by Steam Parameters and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Supercritical Once-through Boiler market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 Supercritical Once-through Boiler

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 Supercritical Once-through Boiler 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 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.

Supercritical Once-through Boiler market is split by Steam Parameters and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Steam Parameters, 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 Steam Parameters

Supercritical Grade (22.1–25 MPa)

Advanced Supercritical Grade (>25–30 MPa)

Ultra-supercritical Grade (>30 MPa)

Market segment by Furnace Type

Pulverized Coal-fired Boiler

Circulating Fluidized Bed Boiler

Oil and Gas-fired Boiler

Others

Market segment 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)

Market segment 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

Major players covered

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)

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 Supercritical Once-through Boiler product scope, market

overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Supercritical Once-through Boiler, with price, sales quantity, revenue, and global market share of Supercritical Once-through Boiler from 2021 to 2026.

Chapter 3, the Supercritical Once-through Boiler competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Supercritical Once-through Boiler 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 Steam Parameters and by Application, with sales market share and growth rate by Steam Parameters, 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 Supercritical Once-through Boiler market forecast, by regions, by Steam Parameters, 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 Supercritical Once-through Boiler.

Chapter 14 and 15, to describe Supercritical Once-through Boiler sales channel, distributors, customers, research findings and conclusion.

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