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Global Turbine Generator Rotor Forging 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 Turbine Generator Rotor Forging market size was valued at US$ 566 million in 2025 and is forecast to a readjusted size of US$ 1039 million by 2032 with a CAGR of 9.1% during review period.

Turbine generator rotor forging refers to a high-end forging integrally formed from large alloy steel ingots via open-die forging, used to manufacture the core rotating components of turbine generators. It mainly consists of HP, IP and LP turbine rotors and the generator rotor itself. Under high-speed rotation at 1500–3000 r/min, the rotor withstands enormous centrifugal force, torque and bending stress, requiring high strength, high toughness, high magnetic permeability and high-temperature resistance (400–565?). The material system primarily uses Ni-Cr-Mo-V series alloy steels, including grades 25Cr2Ni4MoV, 30Cr1Mo1V, and FB2 martensitic heat-resistant steel for ultra-supercritical units. As the 'heart' of power generation equipment, its manufacturing involves dozens of complex steps from smelting, ingot casting, open-die forging, heat treatment, precision machining to non-destructive testing, and its design and process complexity have long been a benchmark for a nation's heavy equipment industry.

Turbine generator rotor forging is one of the most technically demanding and value?added base components in heavy equipment manufacturing. It directly determines whether million?kilowatt thermal and nuclear power units can operate safely and stably for decades. Pricing: a million?kilowatt nuclear monoblock LP rotor can cost USD 5–8 million, while conventional 300–700 MW thermal rotors range from USD 0.5–1.2 million – heavily dependent on weight, material grade and supplier qualification. Margins are highly uneven: Japan Steel Works, with its global monopoly and extreme

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manufacturing capability, commands an estimated gross margin exceeding 40%; Chinese leaders (CFHI, Sinomach Heavy) have achieved domestic breakthroughs in USC FB2 and nuclear rotors, with margins of 25–35%; newer entrants like Taiyuan Heavy face margins below 20% due to capacity ramp?up and prolonged customer certification. Downstream primary applications: coal?fired power accounts for 55–60% of rotor forging demand, nuclear power 25–30%, gas?steam combined cycle and industrial cogeneration 10–15%, others 5%. Incremental demand is driven by: (i) batch construction of China's Hualong One reactors (peaking 2025–2028) and nuclear exports, boosting large?tonnage rotor demand; (ii) life extension and replacement of aging supercritical/ultra?supercritical units (620°C class) in China; (iii) increased flexibility requirements for gas power under the global energy transition, driving replacement of medium?small rotors. Landscape: the global high?end large?tonnage rotor market has long been dominated by Japan Steel Works (~80% of large nuclear forgings), with Doosan Enerbility, CFHI and Sinomach Heavy forming the second tier. Recent breakthroughs by CFHI and Sinomach Heavy in FB2 heat?resistant steel rotors and nuclear monoblock LP rotors are gradually breaking the overseas monopoly, but JSW still holds pricing power and process secrets. Taiyuan Heavy, Shanghai Electric and Dongfang Electric primarily serve the supporting and medium?small rotor segments, not yet in the global high?end core competition. Uncertainties include: new material challenges for ultra?supercritical units moving to 700°C+, which may render FB2 obsolete; pressure on new coal power projects from carbon?reduction policies, potentially shrinking the thermal rotor market in the long term; and tightened nuclear safety regulations extending certification cycles (often 3?5 years), hindering rapid capacity expansion for new entrants. Conclusion: Turbine generator rotor forging is an oligopolistic, high?barrier, high?value?added industry. Its growth is driven by batch nuclear construction, thermal unit refurbishment and domestic substitution. The structural features are extreme technical barriers, lengthy customer certification, and scarce extreme?scale manufacturing capacity. Over the next five years, Chinese leaders are likely to increase their global share in nuclear and USC rotors, but they will not unseat JSW from its dominant high?end position in the short term.

This report is a detailed and comprehensive analysis for global Turbine Generator Rotor Forging market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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.

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Key Features:

Global Turbine Generator Rotor Forging market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

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

Global Turbine Generator Rotor Forging market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Turbine Generator Rotor Forging 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 Turbine Generator Rotor Forging

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 Turbine Generator Rotor Forging 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 Japan Steel Works (JSW), Doosan Enerbility, China First Heavy Industries (CFHI), Sinomach Heavy Equipment Group (SinoMach Heavy), Taiyuan Heavy Industry (TZ), Bharat Forge Limited, Larsen & Toubro Limited, Allegheny Technologies Incorporated (ATI), Japan Casting & Forging (JCF), Kobe Steel (KOBELCO), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Market Segmentation

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

Market segment by Type

? 100 MW Class

100–300 MW Class

300–700 MW Class

700–1000 MW Class

> 1000 MW Class (incl. Nuclear)

Market segment by Service Environment

Subcritical / Supercritical (?566?) - NiCrMoV

Ultra?supercritical (600–620?) - FB2

Generator Rotor (Non?heat) - NiCrMoV / 26NiCrMoV

Low Pressure (LP) Rotor - NiCrMoV / Monobloc

Market segment by Application

Fossil Fuel Power (Coal, Gas)

Nuclear Power (PWR, CANDU)

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Generator Rotor for Power Plant

Steam Turbine Retrofitting & Service

Others

Major players covered

Japan Steel Works (JSW)

Doosan Enerbility

China First Heavy Industries (CFHI)

Sinomach Heavy Equipment Group (SinoMach Heavy)

Taiyuan Heavy Industry (TZ)

Bharat Forge Limited

Larsen & Toubro Limited

Allegheny Technologies Incorporated (ATI)

Japan Casting & Forging (JCF)

Kobe Steel (KOBELCO)

Scot Forge

Arconic

Mitsubishi Heavy Industries (MHI)

Nippon Steel Corporation

Shanghai Electric (SEC)

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Dongfang Electric

Bruck GmbH

Siempelkamp Giesserei

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Turbine Generator Rotor Forging product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Turbine Generator Rotor Forging, with price, sales quantity, revenue, and global market share of Turbine Generator Rotor Forging from 2021 to 2026.

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

Chapter 4, the Turbine Generator Rotor Forging 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 Type and by Application, with sales market

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share and growth rate by Type, 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 Turbine Generator Rotor Forging market forecast, by regions, by Type, 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 Turbine Generator Rotor Forging.

Chapter 14 and 15, to describe Turbine Generator Rotor Forging sales channel, distributors, customers, research findings and conclusion.

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