

Global Turbine Generators Above 1000MW Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Turbine Generators Above 1000MW market size is expected to reach \$ 2241 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Turbine generator above 1000MW refers to a non-salient pole three-phase synchronous generator with rated power not less than 1000 megawatts, directly coupled to a steam turbine for converting mechanical energy into electrical energy. Its main components include stator (frame, core, winding), rotor (shaft, winding, retaining rings, fan), excitation system (brushless rotating or static excitation), and cooling system (water-hydrogen-hydrogen or full hydrogen cooling). This product category serves as the energy conversion terminal in ultra-supercritical coal-fired plants, large gas-steam combined cycle plants, and conventional islands of nuclear stations. At 50Hz grid frequency the rated speed is 3000 rpm, at 60Hz 3600 rpm (for nuclear half-speed units 1500/1800 rpm), with design efficiency no less than 98.5% and design life no less than 30 years. The 1000MW-class turbine generator carries the dual mission of base-load operation and deep peak regulation in large power grids. Each 100MW increase in single-unit capacity reduces specific coal consumption by approximately 2-3 g/kWh, while substantially lowering plant footprint and operating costs. Against the backdrop of global energy transition, this category is a critical flexibility resource enabling high penetration of renewable energy, and serves as a hallmark product that demonstrates a nation's comprehensive capability in heavy power equipment design, precision manufacturing, and intelligent operation & maintenance.

Turbine generators above 1000MW represent the premium segment of heavy power equipment, with high unit prices and gross margins closely tied to project customization. In 2025, China's "Big Three" (Shanghai Electric, Dongfang Electric, Harbin Electric)

dominate the 1000MW class thermal generator market, achieving gross margins of 20%-28% for thermal units and 30%-35% for half-speed nuclear units, the latter due to stricter safety and qualification requirements. Foreign players (GE, Siemens Energy, Mitsubishi, Toshiba) largely rely on technology licensing and joint manufacturing, with their direct share in new coal-fired orders continuing to shrink, though they maintain a strong presence in gas combined cycle and nuclear islands. Downstream, ultra-supercritical coal-fired plants account for about 80% of annual deliveries, nuclear conventional islands for 15%, and large gas combined cycle with industrial cogeneration for the remaining 5%. Emerging markets (India, Indonesia, Vietnam, Bangladesh, Middle East) have become key growth drivers for new orders, while domestic projects are shifting toward double-reheat, high-efficiency, low-carbon designs, demanding deeper leading-phase capability and greater peak-regulation flexibility from generators. Incremental demand comes from three sources: first, power-short regions in Southeast and South Asia are still expanding 1000MW coal-fired capacity, with export orders rising about 15% year-on-year in 2025; second, domestic life-extension and upgrade projects for early-2000s 1000MW units (rotor replacement, stator rewinds) are entering a busy cycle; third, batch construction of nuclear units in China, India and Korea creates steady demand for half-speed turbine generators. The competitive landscape follows a dual-track structure: China's "Big Three" lead in new thermal generator deliveries (over 70% of global volume), while GE, Siemens and Mitsubishi retain core technology and supply of key materials (high-strength rotor forgings, insulation systems) for large nuclear half-speed units, advanced synchronous condensers, and high-value engineering services. Key uncertainties include: first, long-term pressure on coal-fired generator exports from global coal phase-down policies and the EU Carbon Border Adjustment Mechanism; second, the impact of gas combined-cycle unit dynamics and potential carbon capture (CCUS) retrofits on conventional condensing generator operating regimes; third, supply stability of rotor forgings and high-grade electrical steel, along with certification barriers for Chinese equipment in overseas high-end tenders. In summary, the turbine generator market above 1000MW will see moderate single-digit growth, with peak new installation volumes behind us; however, aftermarket services, nuclear incremental capacity and emerging-market exports provide structural support. Local OEMs must shift from pure equipment supply to "equipment + service + upgrades" to sustain profitability.

This report studies the global Turbine Generators Above 1000MW production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Turbine

Generators Above 1000MW 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 Turbine Generators Above 1000MW that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Turbine Generators Above 1000MW total production and demand, 2021-2032, (Units)

Global Turbine Generators Above 1000MW total production value, 2021-2032, (USD Million)

Global Turbine Generators Above 1000MW production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Turbine Generators Above 1000MW consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Turbine Generators Above 1000MW domestic production, consumption, key domestic manufacturers and share

Global Turbine Generators Above 1000MW production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Turbine Generators Above 1000MW production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Turbine Generators Above 1000MW production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Turbine Generators Above 1000MW 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 Shanghai Electric Power Generation Equipment, Dongfang Electric Machinery, Harbin Electric Machinery, GE Steam Power, Siemens Energy, Mitsubishi Heavy Industries, Toshiba Energy Systems, Doosan Enerbility, Hitachi, Russian Power Machines (Elektrosila), 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 Turbine Generators Above 1000MW 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 Type, 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 Turbine Generators Above 1000MW Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Turbine Generators Above 1000MW Market, Segmentation by Type:

1000MW Class

1100MW Class

1200MW Class and above

Global Turbine Generators Above 1000MW Market, Segmentation by Cooling Technology:

Water?Hydrogen?Hydrogen Cooling (W?H?H)

Full Hydrogen Cooling

Air Cooling (TEWAC)

Global Turbine Generators Above 1000MW Market, Segmentation by Application:

Ultra-supercritical Coal-fired Power

Nuclear Power (Conventional Island)

Large Combined Cycle Gas Plant

Industrial Cogeneration

Others

Companies Profiled:

Shanghai Electric Power Generation Equipment

Dongfang Electric Machinery

Harbin Electric Machinery

GE Steam Power

Siemens Energy

Mitsubishi Heavy Industries

Toshiba Energy Systems

Doosan Enerbility

Hitachi

Russian Power Machines (Elektrosila)

Ansaldo Energia

Bharat Heavy Electricals

Key Questions Answered:

1. How big is the global Turbine Generators Above 1000MW market?
2. What is the demand of the global Turbine Generators Above 1000MW market?
3. What is the year over year growth of the global Turbine Generators Above 1000MW market?
4. What is the production and production value of the global Turbine Generators Above 1000MW market?
5. Who are the key producers in the global Turbine Generators Above 1000MW market?
6. What are the growth factors driving the market demand?

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