

Global Turbine Generators Above 1000MW 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 Generators Above 1000MW market size was valued at US\$ 1363 million in 2025 and is forecast to a readjusted size of US\$ 2241 million by 2032 with a CAGR of 7.3% during review period.

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 is a detailed and comprehensive analysis for global Turbine Generators Above 1000MW 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.

Key Features:

Global Turbine Generators Above 1000MW market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Turbine Generators Above 1000MW 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 Generators Above 1000MW 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 Generators Above 1000MW 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 Generators Above 1000MW

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 Generators Above 1000MW 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 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.

Market Segmentation

Turbine Generators Above 1000MW 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

1000MW Class

1100MW Class

1200MW Class and above

Market segment by Cooling Technology

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

Full Hydrogen Cooling

Air Cooling (TEWAC)

Market segment by Application

Ultra?supercritical Coal?fired Power

Nuclear Power (Conventional Island)

Large Combined Cycle Gas Plant

Industrial Cogeneration

Others

Major players covered

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

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 Generators Above 1000MW product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Turbine Generators Above 1000MW, with price, sales quantity, revenue, and global market share of Turbine Generators Above 1000MW from 2021 to 2026.

Chapter 3, the Turbine Generators Above 1000MW competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Turbine Generators Above 1000MW 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 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 Generators Above 1000MW 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 Generators Above 1000MW.

Chapter 14 and 15, to describe Turbine Generators Above 1000MW sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

- 1.1 Product Overview and Scope
- 1.2 Market Estimation Caveats and Base Year
- 1.3 Market Analysis by Type
 - 1.3.1 Overview: Global Turbine Generators Above 1000MW Consumption Value by Type: 2021 Versus 2025 Versus 2032
 - 1.3.2 1000MW Class
 - 1.3.3 1100MW Class
 - 1.3.4 1200MW Class and above
- 1.4 Market Analysis by Cooling Technology
 - 1.4.1 Overview: Global Turbine Generators Above 1000MW Consumption Value by Cooling Technology: 2021 Versus 2025 Versus 2032
 - 1.4.2 Water?Hydrogen?Hydrogen Cooling (W?H?H)
 - 1.4.3 Full Hydrogen Cooling
 - 1.4.4 Air Cooling (TEWAC)
- 1.5 Market Analysis by Application
 - 1.5.1 Overview: Global Turbine Generators Above 1000MW Consumption Value by Application: 2021 Versus 2025 Versus 2032
 - 1.5.2 Ultra?supercritical Coal?fired Power
 - 1.5.3 Nuclear Power (Conventional Island)
 - 1.5.4 Large Combined Cycle Gas Plant
 - 1.5.5 Industrial Cogeneration
 - 1.5.6 Others
- 1.6 Global Turbine Generators Above 1000MW Market Size & Forecast
 - 1.6.1 Global Turbine Generators Above 1000MW Consumption Value (2021 & 2025 & 2032)
 - 1.6.2 Global Turbine Generators Above 1000MW Sales Quantity (2021-2032)
 - 1.6.3 Global Turbine Generators Above 1000MW Average Price (2021-2032)

2 MANUFACTURERS PROFILES

- 2.1 Shanghai Electric Power Generation Equipment
 - 2.1.1 Shanghai Electric Power Generation Equipment Details
 - 2.1.2 Shanghai Electric Power Generation Equipment Major Business
 - 2.1.3 Shanghai Electric Power Generation Equipment Turbine Generators Above 1000MW Product and Services

2.1.4 Shanghai Electric Power Generation Equipment Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Shanghai Electric Power Generation Equipment Recent Developments/Updates

2.2 Dongfang Electric Machinery

2.2.1 Dongfang Electric Machinery Details

2.2.2 Dongfang Electric Machinery Major Business

2.2.3 Dongfang Electric Machinery Turbine Generators Above 1000MW Product and Services

2.2.4 Dongfang Electric Machinery Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Dongfang Electric Machinery Recent Developments/Updates

2.3 Harbin Electric Machinery

2.3.1 Harbin Electric Machinery Details

2.3.2 Harbin Electric Machinery Major Business

2.3.3 Harbin Electric Machinery Turbine Generators Above 1000MW Product and Services

2.3.4 Harbin Electric Machinery Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Harbin Electric Machinery Recent Developments/Updates

2.4 GE Steam Power

2.4.1 GE Steam Power Details

2.4.2 GE Steam Power Major Business

2.4.3 GE Steam Power Turbine Generators Above 1000MW Product and Services

2.4.4 GE Steam Power Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 GE Steam Power Recent Developments/Updates

2.5 Siemens Energy

2.5.1 Siemens Energy Details

2.5.2 Siemens Energy Major Business

2.5.3 Siemens Energy Turbine Generators Above 1000MW Product and Services

2.5.4 Siemens Energy Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Siemens Energy Recent Developments/Updates

2.6 Mitsubishi Heavy Industries

2.6.1 Mitsubishi Heavy Industries Details

2.6.2 Mitsubishi Heavy Industries Major Business

2.6.3 Mitsubishi Heavy Industries Turbine Generators Above 1000MW Product and Services

2.6.4 Mitsubishi Heavy Industries Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Mitsubishi Heavy Industries Recent Developments/Updates

2.7 Toshiba Energy Systems

2.7.1 Toshiba Energy Systems Details

2.7.2 Toshiba Energy Systems Major Business

2.7.3 Toshiba Energy Systems Turbine Generators Above 1000MW Product and Services

2.7.4 Toshiba Energy Systems Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Toshiba Energy Systems Recent Developments/Updates

2.8 Doosan Enerbility

2.8.1 Doosan Enerbility Details

2.8.2 Doosan Enerbility Major Business

2.8.3 Doosan Enerbility Turbine Generators Above 1000MW Product and Services

2.8.4 Doosan Enerbility Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Doosan Enerbility Recent Developments/Updates

2.9 Hitachi

2.9.1 Hitachi Details

2.9.2 Hitachi Major Business

2.9.3 Hitachi Turbine Generators Above 1000MW Product and Services

2.9.4 Hitachi Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Hitachi Recent Developments/Updates

2.10 Russian Power Machines (Elektrosila)

2.10.1 Russian Power Machines (Elektrosila) Details

2.10.2 Russian Power Machines (Elektrosila) Major Business

2.10.3 Russian Power Machines (Elektrosila) Turbine Generators Above 1000MW Product and Services

2.10.4 Russian Power Machines (Elektrosila) Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 Russian Power Machines (Elektrosila) Recent Developments/Updates

2.11 Ansaldo Energia

2.11.1 Ansaldo Energia Details

2.11.2 Ansaldo Energia Major Business

2.11.3 Ansaldo Energia Turbine Generators Above 1000MW Product and Services

2.11.4 Ansaldo Energia Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.11.5 Ansaldo Energia Recent Developments/Updates
- 2.12 Bharat Heavy Electricals
 - 2.12.1 Bharat Heavy Electricals Details
 - 2.12.2 Bharat Heavy Electricals Major Business
 - 2.12.3 Bharat Heavy Electricals Turbine Generators Above 1000MW Product and Services
 - 2.12.4 Bharat Heavy Electricals Turbine Generators Above 1000MW Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 Bharat Heavy Electricals Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: TURBINE GENERATORS ABOVE 1000MW BY MANUFACTURER

- 3.1 Global Turbine Generators Above 1000MW Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Turbine Generators Above 1000MW Revenue by Manufacturer (2021-2026)
- 3.3 Global Turbine Generators Above 1000MW Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Turbine Generators Above 1000MW by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Turbine Generators Above 1000MW Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Turbine Generators Above 1000MW Manufacturer Market Share in 2025
- 3.5 Turbine Generators Above 1000MW Market: Overall Company Footprint Analysis
 - 3.5.1 Turbine Generators Above 1000MW Market: Region Footprint
 - 3.5.2 Turbine Generators Above 1000MW Market: Company Product Type Footprint
 - 3.5.3 Turbine Generators Above 1000MW Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Turbine Generators Above 1000MW Market Size by Region
 - 4.1.1 Global Turbine Generators Above 1000MW Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Turbine Generators Above 1000MW Consumption Value by Region (2021-2032)
 - 4.1.3 Global Turbine Generators Above 1000MW Average Price by Region

(2021-2032)

4.2 North America Turbine Generators Above 1000MW Consumption Value

(2021-2032)

4.3 Europe Turbine Generators Above 1000MW Consumption Value (2021-2032)

4.4 Asia-Pacific Turbine Generators Above 1000MW Consumption Value (2021-2032)

4.5 South America Turbine Generators Above 1000MW Consumption Value

(2021-2032)

4.6 Middle East & Africa Turbine Generators Above 1000MW Consumption Value

(2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Turbine Generators Above 1000MW Sales Quantity by Type (2021-2032)

5.2 Global Turbine Generators Above 1000MW Consumption Value by Type

(2021-2032)

5.3 Global Turbine Generators Above 1000MW Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Turbine Generators Above 1000MW Sales Quantity by Application

(2021-2032)

6.2 Global Turbine Generators Above 1000MW Consumption Value by Application

(2021-2032)

6.3 Global Turbine Generators Above 1000MW Average Price by Application

(2021-2032)

7 NORTH AMERICA

7.1 North America Turbine Generators Above 1000MW Sales Quantity by Type

(2021-2032)

7.2 North America Turbine Generators Above 1000MW Sales Quantity by Application

(2021-2032)

7.3 North America Turbine Generators Above 1000MW Market Size by Country

7.3.1 North America Turbine Generators Above 1000MW Sales Quantity by Country

(2021-2032)

7.3.2 North America Turbine Generators Above 1000MW Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Turbine Generators Above 1000MW Sales Quantity by Type (2021-2032)

8.2 Europe Turbine Generators Above 1000MW Sales Quantity by Application (2021-2032)

8.3 Europe Turbine Generators Above 1000MW Market Size by Country

8.3.1 Europe Turbine Generators Above 1000MW Sales Quantity by Country (2021-2032)

8.3.2 Europe Turbine Generators Above 1000MW Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Turbine Generators Above 1000MW Market Size by Region

9.3.1 Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Turbine Generators Above 1000MW Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Turbine Generators Above 1000MW Sales Quantity by Type

(2021-2032)

10.2 South America Turbine Generators Above 1000MW Sales Quantity by Application

(2021-2032)

10.3 South America Turbine Generators Above 1000MW Market Size by Country

10.3.1 South America Turbine Generators Above 1000MW Sales Quantity by Country

(2021-2032)

10.3.2 South America Turbine Generators Above 1000MW Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Turbine Generators Above 1000MW Market Size by Country

11.3.1 Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Turbine Generators Above 1000MW Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Turbine Generators Above 1000MW Market Drivers

12.2 Turbine Generators Above 1000MW Market Restraints

12.3 Turbine Generators Above 1000MW Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Turbine Generators Above 1000MW and Key Manufacturers

13.2 Manufacturing Costs Percentage of Turbine Generators Above 1000MW

13.3 Turbine Generators Above 1000MW Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Turbine Generators Above 1000MW Typical Distributors

14.3 Turbine Generators Above 1000MW Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Turbine Generators Above 1000MW Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Turbine Generators Above 1000MW Consumption Value by Cooling Technology, (USD Million), 2021 & 2025 & 2032

Table 3. Global Turbine Generators Above 1000MW Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Shanghai Electric Power Generation Equipment Basic Information, Manufacturing Base and Competitors

Table 5. Shanghai Electric Power Generation Equipment Major Business

Table 6. Shanghai Electric Power Generation Equipment Turbine Generators Above 1000MW Product and Services

Table 7. Shanghai Electric Power Generation Equipment Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 8. Shanghai Electric Power Generation Equipment Recent Developments/Updates

Table 9. Dongfang Electric Machinery Basic Information, Manufacturing Base and Competitors

Table 10. Dongfang Electric Machinery Major Business

Table 11. Dongfang Electric Machinery Turbine Generators Above 1000MW Product and Services

Table 12. Dongfang Electric Machinery Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 13. Dongfang Electric Machinery Recent Developments/Updates

Table 14. Harbin Electric Machinery Basic Information, Manufacturing Base and Competitors

Table 15. Harbin Electric Machinery Major Business

Table 16. Harbin Electric Machinery Turbine Generators Above 1000MW Product and Services

Table 17. Harbin Electric Machinery Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 18. Harbin Electric Machinery Recent Developments/Updates

Table 19. GE Steam Power Basic Information, Manufacturing Base and Competitors

Table 20. GE Steam Power Major Business

Table 21. GE Steam Power Turbine Generators Above 1000MW Product and Services

Table 22. GE Steam Power Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 23. GE Steam Power Recent Developments/Updates

Table 24. Siemens Energy Basic Information, Manufacturing Base and Competitors

Table 25. Siemens Energy Major Business

Table 26. Siemens Energy Turbine Generators Above 1000MW Product and Services

Table 27. Siemens Energy Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 28. Siemens Energy Recent Developments/Updates

Table 29. Mitsubishi Heavy Industries Basic Information, Manufacturing Base and Competitors

Table 30. Mitsubishi Heavy Industries Major Business

Table 31. Mitsubishi Heavy Industries Turbine Generators Above 1000MW Product and Services

Table 32. Mitsubishi Heavy Industries Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 33. Mitsubishi Heavy Industries Recent Developments/Updates

Table 34. Toshiba Energy Systems Basic Information, Manufacturing Base and Competitors

Table 35. Toshiba Energy Systems Major Business

Table 36. Toshiba Energy Systems Turbine Generators Above 1000MW Product and Services

Table 37. Toshiba Energy Systems Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 38. Toshiba Energy Systems Recent Developments/Updates

Table 39. Doosan Enerbility Basic Information, Manufacturing Base and Competitors

Table 40. Doosan Enerbility Major Business

Table 41. Doosan Enerbility Turbine Generators Above 1000MW Product and Services

Table 42. Doosan Enerbility Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 43. Doosan Enerbility Recent Developments/Updates

Table 44. Hitachi Basic Information, Manufacturing Base and Competitors

Table 45. Hitachi Major Business

Table 46. Hitachi Turbine Generators Above 1000MW Product and Services

Table 47. Hitachi Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 48. Hitachi Recent Developments/Updates

Table 49. Russian Power Machines (Elektrosila) Basic Information, Manufacturing Base and Competitors

Table 50. Russian Power Machines (Elektrosila) Major Business

Table 51. Russian Power Machines (Elektrosila) Turbine Generators Above 1000MW Product and Services

Table 52. Russian Power Machines (Elektrosila) Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 53. Russian Power Machines (Elektrosila) Recent Developments/Updates

Table 54. Ansaldo Energia Basic Information, Manufacturing Base and Competitors

Table 55. Ansaldo Energia Major Business

Table 56. Ansaldo Energia Turbine Generators Above 1000MW Product and Services

Table 57. Ansaldo Energia Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 58. Ansaldo Energia Recent Developments/Updates

Table 59. Bharat Heavy Electricals Basic Information, Manufacturing Base and Competitors

Table 60. Bharat Heavy Electricals Major Business

Table 61. Bharat Heavy Electricals Turbine Generators Above 1000MW Product and Services

Table 62. Bharat Heavy Electricals Turbine Generators Above 1000MW Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 63. Bharat Heavy Electricals Recent Developments/Updates

Table 64. Global Turbine Generators Above 1000MW Sales Quantity by Manufacturer (2021-2026) & (Units)

Table 65. Global Turbine Generators Above 1000MW Revenue by Manufacturer (2021-2026) & (USD Million)

Table 66. Global Turbine Generators Above 1000MW Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 67. Market Position of Manufacturers in Turbine Generators Above 1000MW, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 68. Head Office and Turbine Generators Above 1000MW Production Site of Key

Manufacturer

Table 69. Turbine Generators Above 1000MW Market: Company Product Type Footprint

Table 70. Turbine Generators Above 1000MW Market: Company Product Application Footprint

Table 71. Turbine Generators Above 1000MW New Market Entrants and Barriers to Market Entry

Table 72. Turbine Generators Above 1000MW Mergers, Acquisition, Agreements, and Collaborations

Table 73. Global Turbine Generators Above 1000MW Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 74. Global Turbine Generators Above 1000MW Sales Quantity by Region (2021-2026) & (Units)

Table 75. Global Turbine Generators Above 1000MW Sales Quantity by Region (2027-2032) & (Units)

Table 76. Global Turbine Generators Above 1000MW Consumption Value by Region (2021-2026) & (USD Million)

Table 77. Global Turbine Generators Above 1000MW Consumption Value by Region (2027-2032) & (USD Million)

Table 78. Global Turbine Generators Above 1000MW Average Price by Region (2021-2026) & (US\$/Unit)

Table 79. Global Turbine Generators Above 1000MW Average Price by Region (2027-2032) & (US\$/Unit)

Table 80. Global Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 81. Global Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 82. Global Turbine Generators Above 1000MW Consumption Value by Type (2021-2026) & (USD Million)

Table 83. Global Turbine Generators Above 1000MW Consumption Value by Type (2027-2032) & (USD Million)

Table 84. Global Turbine Generators Above 1000MW Average Price by Type (2021-2026) & (US\$/Unit)

Table 85. Global Turbine Generators Above 1000MW Average Price by Type (2027-2032) & (US\$/Unit)

Table 86. Global Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 87. Global Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 88. Global Turbine Generators Above 1000MW Consumption Value by Application (2021-2026) & (USD Million)

Table 89. Global Turbine Generators Above 1000MW Consumption Value by Application (2027-2032) & (USD Million)

Table 90. Global Turbine Generators Above 1000MW Average Price by Application (2021-2026) & (US\$/Unit)

Table 91. Global Turbine Generators Above 1000MW Average Price by Application (2027-2032) & (US\$/Unit)

Table 92. North America Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 93. North America Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 94. North America Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 95. North America Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 96. North America Turbine Generators Above 1000MW Sales Quantity by Country (2021-2026) & (Units)

Table 97. North America Turbine Generators Above 1000MW Sales Quantity by Country (2027-2032) & (Units)

Table 98. North America Turbine Generators Above 1000MW Consumption Value by Country (2021-2026) & (USD Million)

Table 99. North America Turbine Generators Above 1000MW Consumption Value by Country (2027-2032) & (USD Million)

Table 100. Europe Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 101. Europe Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 102. Europe Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 103. Europe Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 104. Europe Turbine Generators Above 1000MW Sales Quantity by Country (2021-2026) & (Units)

Table 105. Europe Turbine Generators Above 1000MW Sales Quantity by Country (2027-2032) & (Units)

Table 106. Europe Turbine Generators Above 1000MW Consumption Value by Country (2021-2026) & (USD Million)

Table 107. Europe Turbine Generators Above 1000MW Consumption Value by Country

(2027-2032) & (USD Million)

Table 108. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 109. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 110. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 111. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 112. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Region (2021-2026) & (Units)

Table 113. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity by Region (2027-2032) & (Units)

Table 114. Asia-Pacific Turbine Generators Above 1000MW Consumption Value by Region (2021-2026) & (USD Million)

Table 115. Asia-Pacific Turbine Generators Above 1000MW Consumption Value by Region (2027-2032) & (USD Million)

Table 116. South America Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 117. South America Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 118. South America Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 119. South America Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 120. South America Turbine Generators Above 1000MW Sales Quantity by Country (2021-2026) & (Units)

Table 121. South America Turbine Generators Above 1000MW Sales Quantity by Country (2027-2032) & (Units)

Table 122. South America Turbine Generators Above 1000MW Consumption Value by Country (2021-2026) & (USD Million)

Table 123. South America Turbine Generators Above 1000MW Consumption Value by Country (2027-2032) & (USD Million)

Table 124. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Type (2021-2026) & (Units)

Table 125. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Type (2027-2032) & (Units)

Table 126. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Application (2021-2026) & (Units)

Table 127. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Application (2027-2032) & (Units)

Table 128. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Country (2021-2026) & (Units)

Table 129. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity by Country (2027-2032) & (Units)

Table 130. Middle East & Africa Turbine Generators Above 1000MW Consumption Value by Country (2021-2026) & (USD Million)

Table 131. Middle East & Africa Turbine Generators Above 1000MW Consumption Value by Country (2027-2032) & (USD Million)

Table 132. Turbine Generators Above 1000MW Raw Material

Table 133. Key Manufacturers of Turbine Generators Above 1000MW Raw Materials

Table 134. Turbine Generators Above 1000MW Typical Distributors

Table 135. Turbine Generators Above 1000MW Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Turbine Generators Above 1000MW Picture
- Figure 2. Global Turbine Generators Above 1000MW Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Turbine Generators Above 1000MW Revenue Market Share by Type in 2025
- Figure 4. 1000MW Class Examples
- Figure 5. 1100MW Class Examples
- Figure 6. 1200MW Class and above Examples
- Figure 7. Global Turbine Generators Above 1000MW Revenue by Cooling Technology, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global Turbine Generators Above 1000MW Revenue Market Share by Cooling Technology in 2025
- Figure 9. Water?Hydrogen?Hydrogen Cooling (W?H?H) Examples
- Figure 10. Full Hydrogen Cooling Examples
- Figure 11. Air Cooling (TEWAC) Examples
- Figure 12. Global Turbine Generators Above 1000MW Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 13. Global Turbine Generators Above 1000MW Revenue Market Share by Application in 2025
- Figure 14. Ultra?supercritical Coal?fired Power Examples
- Figure 15. Nuclear Power (Conventional Island) Examples
- Figure 16. Large Combined Cycle Gas Plant Examples
- Figure 17. Industrial Cogeneration Examples
- Figure 18. Others Examples
- Figure 19. Global Turbine Generators Above 1000MW Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 20. Global Turbine Generators Above 1000MW Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 21. Global Turbine Generators Above 1000MW Sales Quantity (2021-2032) & (Units)
- Figure 22. Global Turbine Generators Above 1000MW Price (2021-2032) & (US\$/Unit)
- Figure 23. Global Turbine Generators Above 1000MW Sales Quantity Market Share by Manufacturer in 2025
- Figure 24. Global Turbine Generators Above 1000MW Revenue Market Share by Manufacturer in 2025

Figure 25. Producer Shipments of Turbine Generators Above 1000MW by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 26. Top 3 Turbine Generators Above 1000MW Manufacturer (Revenue) Market Share in 2025

Figure 27. Top 6 Turbine Generators Above 1000MW Manufacturer (Revenue) Market Share in 2025

Figure 28. Global Turbine Generators Above 1000MW Sales Quantity Market Share by Region (2021-2032)

Figure 29. Global Turbine Generators Above 1000MW Consumption Value Market Share by Region (2021-2032)

Figure 30. North America Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 31. Europe Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 32. Asia-Pacific Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 33. South America Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 34. Middle East & Africa Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 35. Global Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 36. Global Turbine Generators Above 1000MW Consumption Value Market Share by Type (2021-2032)

Figure 37. Global Turbine Generators Above 1000MW Average Price by Type (2021-2032) & (US\$/Unit)

Figure 38. Global Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 39. Global Turbine Generators Above 1000MW Revenue Market Share by Application (2021-2032)

Figure 40. Global Turbine Generators Above 1000MW Average Price by Application (2021-2032) & (US\$/Unit)

Figure 41. North America Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 42. North America Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 43. North America Turbine Generators Above 1000MW Sales Quantity Market Share by Country (2021-2032)

Figure 44. North America Turbine Generators Above 1000MW Consumption Value

Market Share by Country (2021-2032)

Figure 45. United States Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 46. Canada Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 47. Mexico Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 48. Europe Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 49. Europe Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 50. Europe Turbine Generators Above 1000MW Sales Quantity Market Share by Country (2021-2032)

Figure 51. Europe Turbine Generators Above 1000MW Consumption Value Market Share by Country (2021-2032)

Figure 52. Germany Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 53. France Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 54. United Kingdom Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 55. Russia Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 56. Italy Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 57. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 58. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 59. Asia-Pacific Turbine Generators Above 1000MW Sales Quantity Market Share by Region (2021-2032)

Figure 60. Asia-Pacific Turbine Generators Above 1000MW Consumption Value Market Share by Region (2021-2032)

Figure 61. China Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 62. Japan Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 63. South Korea Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 64. India Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 65. Southeast Asia Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 66. Australia Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 67. South America Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 68. South America Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 69. South America Turbine Generators Above 1000MW Sales Quantity Market Share by Country (2021-2032)

Figure 70. South America Turbine Generators Above 1000MW Consumption Value Market Share by Country (2021-2032)

Figure 71. Brazil Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 72. Argentina Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 73. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity Market Share by Type (2021-2032)

Figure 74. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity Market Share by Application (2021-2032)

Figure 75. Middle East & Africa Turbine Generators Above 1000MW Sales Quantity Market Share by Country (2021-2032)

Figure 76. Middle East & Africa Turbine Generators Above 1000MW Consumption Value Market Share by Country (2021-2032)

Figure 77. Turkey Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 78. Egypt Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 79. Saudi Arabia Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 80. South Africa Turbine Generators Above 1000MW Consumption Value (2021-2032) & (USD Million)

Figure 81. Turbine Generators Above 1000MW Market Drivers

Figure 82. Turbine Generators Above 1000MW Market Restraints

Figure 83. Turbine Generators Above 1000MW Market Trends

Figure 84. Porters Five Forces Analysis

Figure 85. Manufacturing Cost Structure Analysis of Turbine Generators Above

1000MW in 2025

Figure 86. Manufacturing Process Analysis of Turbine Generators Above 1000MW

Figure 87. Turbine Generators Above 1000MW Industrial Chain

Figure 88. Sales Channel: Direct to End-User vs Distributors

Figure 89. Direct Channel Pros & Cons

Figure 90. Indirect Channel Pros & Cons

Figure 91. Methodology

Figure 92. Research Process and Data Source

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