

# **Gas Turbine Market Report by Technology (Combined Cycle Gas Turbine, Open Cycle Gas Turbine), Design Type (Heavy Duty (Frame) Type, Aeroderivative Type), Rated Capacity (Above 300 MW, 120-300 MW, 40-120 MW, Less Than 40 MW), End User (Power Generation, Mobility, Oil and Gas, and Others), and Region 2024-2032**

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## **Abstracts**

The global gas turbine market size reached US\$ 25.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 33.8 Billion by 2032, exhibiting a growth rate (CAGR) of 3.23% during 2024-2032. The market is primarily driven by the augmenting demand for energy due to rapid industrialization and urbanization, considerable growth in construction and infrastructure development activities, and the imperative shift toward cleaner energy sources across the globe.

### **Gas Turbine Market Analysis:**

**Market Growth and Size:** The global market is experiencing robust growth, driven by increasing energy demands, infrastructure development, and the need for cleaner energy sources. The market size is substantial, reflecting the integral role of gas turbines in diverse sectors.

**Major Market Drivers:** Key drivers include the rising global energy demand, a transition to sustainable energy sources, and the flexibility and reliability of gas turbines. These factors are pivotal in meeting the electricity needs of various industries and addressing the challenges posed by intermittent renewable energy sources.

**Technological Advancements:** Ongoing technological advancements, such as combined cycle gas turbine (CCGT) systems and aero-derivative designs, contribute to enhanced efficiency and versatility. Digitalization and predictive maintenance solutions further

elevate the performance and reliability of gas turbines.

**Industry Applications:** These turbines find applications in power generation, mobility (aviation, marine, and land-based), and the oil and gas sector. Their adaptability across these diverse industries underscores their significance in supporting energy infrastructure, transportation, and industrial processes.

**Key Market Trends:** Current trends include the adoption of gas turbines for decentralized power generation, the integration of renewable energy sources, and the emphasis on sustainability. Additionally, advancements in additive manufacturing and materials contribute to improved turbine design and efficiency.

**Geographical Trends:** Asia Pacific dominates the market due to rapid industrialization and urbanization, while other regions, including North America and Europe, focus on sustainable energy transitions. The Middle East and Africa leverage gas turbines for oil and gas operations and infrastructure development.

**Competitive Landscape:** The competitive landscape features major players actively investing in research and development, partnerships, and acquisitions. Companies are striving to enhance their technological capabilities, expand market reach, and offer innovative solutions to meet evolving customer demands.

**Challenges and Opportunities:** Challenges include environmental concerns and regulatory pressures, driving the need for cleaner technologies. Opportunities lie in addressing these challenges through advancements in turbine efficiency, emissions reduction, and embracing digital solutions for predictive maintenance.

**Future Outlook:** The future outlook for the global market is promising, with the market poised for continued growth. Opportunities for market players include sustainability-focused innovations, participation in emerging markets, and adapting to evolving energy landscapes, ensuring gas turbines remain integral to global energy solutions.

#### Gas Turbine Market Trends:

Increasing energy demand

The relentless rise in global energy demand has become a primary driver for the expanding market. This escalating need, fueled by rapid industrialization and urbanization, necessitates efficient and reliable power generation solutions. These turbines emerge as a preferred choice due to their quick startup capabilities and remarkable fuel efficiency. As industries expand and cities grow, the energy demand continues to rise, positioning these turbines as a crucial player in meeting these evolving energy requirements on a global scale. Moreover, the growing adoption of electric vehicles and the electrification of various sectors are contributing factors, further intensifying the demand for robust energy solutions.

## Rapid technological advancements

The dynamic growth of the market is intricately tied to continuous technological advancements. Ongoing innovations in materials, design principles, and control systems propel the performance of these turbines to unprecedented levels. These technological strides result in turbines that are not only more efficient and durable but also align with contemporary environmental standards. Furthermore, the integration of cutting-edge digital technologies, such as predictive maintenance and advanced monitoring systems, enhances reliability and minimizes downtime, solidifying these turbines as a forefront technology in power generation. Extensive research and development (R&D) initiatives ensure that these turbines remain at the forefront of technological innovation, driving their continued relevance in the energy landscape.

## Rising environmental sustainability

One of the pivotal factors steering the market's upward growth is the intensifying focus on environmental sustainability. These turbines stand out as environmentally responsible alternatives, producing significantly lower emissions compared to conventional power generation methods. This aligns seamlessly with global initiatives aimed at combating climate change and reducing carbon footprints. Governments and industries alike are increasingly recognizing the intrinsic value of these turbines in achieving cleaner energy solutions. As environmental concerns continue to gain prominence, the market's growth is propelled by the imperative shift towards sustainable and eco-friendly power generation practices. Additionally, the integration of renewable energy sources, such as wind and solar, with these turbines contributes to a more sustainable energy mix, further reinforcing their position in the market.

## Gas Turbine Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global and regional levels for 2024-2032. Our report has categorized the market based on technology, design type, rated capacity, and end-user.

## Breakup by Technology:

Combined Cycle Gas Turbine

Open Cycle Gas Turbine

Combined cycle gas turbine accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the technology. This includes combined cycle gas turbine and open cycle gas turbine. According to the report, combined cycle gas turbine represented the largest segment.

In the market segmentation based on technology, combined cycle gas turbine (CCGT) stands out as the largest segment. CCGT technology integrates both gas and steam turbines, optimizing energy efficiency by utilizing the waste heat from the gas turbine to produce additional electricity through the steam turbine. This configuration enhances overall power plant efficiency, making CCGT systems highly preferred for large-scale electricity generation. The superior thermal efficiency, reduced environmental impact, and cost-effectiveness contribute to the dominance of CCGT technology in the market, particularly in utility-scale power plants and industrial applications.

On the contrary, the open cycle gas turbine (OCGT) represents another important segment in the market's technological segmentation. OCGT systems operate solely on the Brayton Cycle, where compressed air is mixed with fuel and ignited to generate power. While OCGT technology is typically less efficient than CCGT, it offers advantages in terms of simplicity, rapid start-up, and suitability for decentralized or peaking power generation. Although not as thermally efficient as CCGT, OCGT technology remains valuable for specific operational requirements, contributing to its presence in the diverse landscape of the market.

Breakup by Design Type:

Heavy Duty (Frame) Type  
Aeroderivative Type

Heavy duty (frame) type holds the largest share of the industry

A detailed breakup and analysis of the market based on the design type have also been provided in the report. This includes heavy duty (frame) type and aeroderivative type. According to the report, heavy duty (frame) type accounted for the largest market share.

In the market segmentation based on design type, the heavy duty (frame) type emerges as the largest segment. Heavy-duty gas turbines are robust, large-scale machines designed for high-power applications, such as utility and industrial power plants. Known for their durability, extended operational life, and ability to handle continuous, base-load power generation, heavy-duty gas turbines play a critical role in meeting the electricity demands of large-scale industrial and grid applications. These turbines are

characterized by their sturdy frame construction and are often utilized in scenarios where reliability, efficiency, and consistent performance are paramount, making them a cornerstone in the power generation infrastructure.

On the other hand, the aeroderivative type constitutes another important segment in the market's design type segmentation. While aeroderivative gas turbines may have a lower output compared to heavy-duty types, their versatility makes them suitable for decentralized power generation and industries with dynamic energy demands. The aeroderivative segment's flexibility and adaptability contribute to its significance in scenarios where rapid deployment and operational responsiveness are prioritized.

#### Breakup by Rated Capacity:

Above 300 MW

120-300 MW

40-120 MW

Less Than 40 MW

Above 3000 MW represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the rated capacity. This includes above 300 MW, 120-300 MW, 40-120 MW, and less than 40 MW. According to the report, above 300 MW represented the largest segment.

The market segmentation based on rated capacity places "Above 300 MW" as the largest segment. Gas turbines with a rated capacity above 300 MW are substantial powerhouses used in large-scale, utility-grade power plants. These turbines are integral to meeting the substantial electricity demands of urban centers and industrial complexes. Their high output and efficiency make them key contributors to grid stability and reliable power supply. Typically deployed in major power generation facilities, gas turbines with a capacity above 300 MW play a crucial role in supporting the base-load electricity requirements of expansive regions and industries.

In the rated capacity segmentation, the "120-300 MW" segment represents gas turbines with a moderate power output. These turbines find application in diverse settings, including industrial plants and medium-sized power generation facilities. With a balanced capacity range, gas turbines in this segment are adaptable to varying energy demands. They are often employed in scenarios where flexibility, efficiency, and a mid-range power output are essential, making them suitable for supporting both industrial

processes and contributing to regional electricity grids.

The "40-120 MW" segment encompasses gas turbines with a lower to mid-range capacity, offering versatile solutions for power generation. Gas turbines in this category find applications in a variety of settings, including distributed energy systems, smaller industrial facilities, and community-scale power plants. Their flexibility and efficient performance make them suitable for addressing localized electricity demands, supporting grid stability, and providing reliable power in areas with smaller-scale energy needs.

The "Less Than 40 MW" segment comprises gas turbines with lower power outputs, designed for decentralized and distributed power generation. These turbines are often utilized in applications such as small-scale industrial facilities, combined heat and power (CHP) systems, and remote or off-grid locations. Gas turbines in this segment offer advantages in terms of compact size, quick start-up, and the ability to meet localized energy needs efficiently. They contribute to enhancing energy resilience and providing power solutions in areas with limited access to centralized grids.

Breakup by End User:

Power Generation

Mobility

Oil and Gas

Others

Power generation represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end user. This includes power generation, mobility, oil and gas, and others. According to the report, power generation represented the largest segment.

In the market segmentation based on end-user, "Power Generation" stands out as the largest segment. Gas turbines play a pivotal role in the power generation sector, where they are employed in a variety of applications, from large utility-scale power plants to distributed energy systems. The versatility, efficiency, and reliability of gas turbines make them a cornerstone in meeting the increasing global demand for electricity. Whether utilized in combined cycle plants, peaker plants, or standalone power generation facilities, gas turbines cater to the diverse needs of the power generation sector, providing a flexible and efficient solution for generating electricity.



The "Mobility" segment represents a diverse range of applications where gas turbines contribute to propulsion systems. This includes aviation, marine, and land-based mobility solutions. In aviation, aeroderivative gas turbines power aircraft, providing thrust for propulsion. In marine applications, gas turbines drive naval vessels and commercial ships, offering high power-to-weight ratios. Gas turbines are also utilized in certain land-based mobility applications, such as rail transport. The mobility segment benefits from the compact size, rapid start-up, and high power density characteristics of gas turbines, making them suitable for various transportation needs.

Within the "Oil and Gas" segment, gas turbines find critical applications across the entire oil and gas value chain. From upstream exploration and production operations to downstream refining and petrochemical processes, gas turbines are employed for power generation, mechanical drive, and process heating. In upstream operations, gas turbines power drilling rigs and production facilities. In downstream processes, they drive compressors and generators for refining and petrochemical plants. This segment relies on the adaptability and efficiency of gas turbines to meet the energy demands of a highly dynamic industry, contributing to the extraction, processing, and distribution of hydrocarbons.

#### Breakup by Region:

Asia Pacific

Europe

North America

Middle East and Africa

Latin America

Asia Pacific leads the market, accounting for the largest gas turbine market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, Europe, North America, the Middle East and Africa, and Latin America. According to the report, Asia Pacific accounted for the largest market share.

As the largest segment in the regional segmentation, "Asia Pacific" is a powerhouse in the gas turbine market. The region's rapid industrialization, population growth, and increasing urbanization contribute to a soaring demand for electricity. Gas turbines play a vital role in meeting this escalating energy demand, especially in countries like China

and India. The Asia Pacific region witnesses extensive deployment of gas turbines for power generation in utility-scale plants, supporting economic development and infrastructure projects. The continuous expansion of energy infrastructure and the adoption of advanced gas turbine technologies contribute to the dominance of Asia Pacific in the global market.

In the regional segmentation, "North America" represents a significant market for gas turbines. The region is characterized by a mature energy infrastructure, where gas turbines play a crucial role in power generation for industries and residential areas. The demand for gas turbines in North America is driven by factors such as the replacement of aging power plants, the integration of renewable energy sources, and the consistent need for reliable electricity. Additionally, the shale gas boom in the United States has further boosted the utilization of gas turbines in the energy landscape of North America.

Europe represents a significant market for gas turbines, driven by the region's focus on renewable energy integration, energy efficiency, and grid stability. Gas turbines complement the energy mix by providing flexible power generation solutions that support the intermittent nature of renewable sources. European countries invest in modernizing their power generation facilities, enhancing energy security, and achieving carbon reduction targets. The adoption of combined heat and power (CHP) systems further contributes to the demand for gas turbines in Europe, making them integral to the region's sustainable energy transition.

In Latin America, the gas turbine market experiences demand driven by the region's economic development, urbanization, and the need for reliable power sources. Gas turbines are utilized in power plants across Latin American countries, supporting industrial growth and addressing electricity needs. The flexibility of gas turbines makes them suitable for meeting both base-load and peak electricity demands, contributing to the resilience of power grids in the region. Latin America's diverse energy landscape, including hydrocarbon-rich nations, positions gas turbines as key assets in ensuring a stable and efficient energy supply.

The Middle East and Africa region is a notable market for gas turbines, primarily due to the presence of major oil-producing countries and ongoing infrastructure development projects. Gas turbines play a crucial role in power generation for industries, desalination plants, and urban centers. The region's focus on diversifying its energy mix, enhancing energy security, and meeting growing electricity demands contributes to the prominence of gas turbines in the energy infrastructure of the Middle East and Africa. The adaptability of gas turbines to operate in harsh environments and their ability to support



combined cycle applications make them valuable assets in the region's energy landscape.

#### Leading Key Players in the Gas Turbine Industry:

The key players in the market are actively engaged in strategic initiatives to enhance their market presence, technological capabilities, and sustainability. These initiatives include investments in research and development to introduce advanced and efficient turbine technologies, addressing the industry's growing emphasis on sustainability and reduced environmental impact. Additionally, companies are focusing on collaborations and partnerships to leverage complementary expertise and expand their market reach. Mergers and acquisitions play a significant role, enabling firms to consolidate their positions, access new markets, and diversify their product portfolios. Furthermore, key players are investing in digitalization and data analytics to offer predictive maintenance solutions, enhancing the reliability and performance of gas turbines. These dynamic strategies underscore the industry's commitment to innovation, environmental responsibility, and meeting the evolving energy needs of diverse sectors globally.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Kawasaki Heavy Industries

Siemens

GE

MHPS

Ansaldo

Harbin Electric

OPRA

MAN Diesel

Solar Turbines

Vericor Power

BHEL

Centrax

Zorya

Caterpillar

General Electric

Mitsubishi Heavy Industries

(Please note that this is only a partial list of the key players, and the complete list is

provided in the report.)

#### Latest News:

November 30, 2023: Kawasaki Heavy Industries announced that it has established a framework for all types of sustainable finance (Green, Transition, Transition Linked, Blue, Social, Sustainability Linked) (“the Master Framework”).

October 10, 2023: Siemens announced that it has achieved a significant milestone for its Siemens Xcelerator platform with the inclusion of 100 India-relevant digital use and reference cases across multiple industries such as Food & Beverage, Data Centers, Commercial Buildings, Power Utilities, and others.

December 14, 2023: GE announced that it has signed a framework agreement with Forestalia to install up to 693 MW of onshore wind turbines across 16 future project sites throughout the Aragon region in Spain.

#### Key Questions Answered in This Report

1. What was the size of the global gas turbine market in 2023?
2. What is the expected growth rate of the global gas turbine market during 2024-2032?
3. What are the key factors driving the global gas turbine market?
4. What has been the impact of COVID-19 on the global gas turbine market?
5. What is the breakup of the global gas turbine market based on the technology?
6. What is the breakup of the global gas turbine market based on the design type?
7. What is the breakup of the global gas turbine market based on the rated capacity?
8. What is the breakup of the global gas turbine market based on the end user?
9. What are the key regions in the global gas turbine market?
10. Who are the key players/companies in the global gas turbine market?

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