

Microturbine Market Report by Application (Combined Heat and Power (CHP), Standby Power), Power Rating (12 kW – 50 kW, 50 kW – 250 kW, 250 kW – 500 kW), End-User (Residential, Commercial, Industrial), and Region 2024-2032

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Abstracts

The global microturbine market size reached US\$ 83.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 160.2 Billion by 2032, exhibiting a growth rate (CAGR) of 7.2% during 2024-2032. The rising prevalence of dental disorders, increasing dental tourism in the emerging markets, and inflating disposable incomes in developing nations are some of the major factors propelling the market.

A microturbine is a small-scale power generation device that operates on the same principles as traditional gas turbines but at a much smaller scale. Typically ranging from 25 kilowatts to 500 kilowatts in capacity, microturbines are compact, lightweight, and highly efficient power generators. They are designed to provide distributed energy solutions for various applications, including residential, commercial, industrial, and remote power generation. The microturbine's operation involves the combustion of a variety of fuels, such as natural gas, diesel, or even biogas, which drives a turbine to produce electricity. The exhaust heat generated during this process can be utilized for co-generation or thermal applications, enhancing overall energy efficiency. Due to their compact size and modular design, microturbines offer easy installation and flexibility, making them suitable for both on-grid and off-grid power generation scenarios. These innovative devices have gained popularity in recent years due to their environmental benefits, reduced greenhouse gas emissions, and lower operational costs. Moreover, advancements in technology have led to increased reliability and longer maintenance intervals, further bolstering their appeal in the energy market. As the demand for decentralized and sustainable energy solutions continues to grow, microturbines are

expected to play an increasingly vital role in meeting the diverse power generation needs of various industries and applications.

The rise in demand for decentralized energy solutions is one of the primary factors driving the market. Microturbines offer a compact and efficient way to generate power on-site, reducing the need for extensive transmission infrastructure and enabling businesses and communities to become more self-reliant in meeting their energy needs. Additionally, with increasing concerns about climate change and the need to reduce greenhouse gas emissions, there is a growing emphasis on adopting energy-efficient and environmentally friendly technologies. They fit this criterion by utilizing cleaner fuels and offering co-generation capabilities that leverage waste heat for additional energy generation, thus reducing overall energy wastage. Other than this, the increasing frequency of power outages and grid disruptions due to natural disasters or other factors has highlighted the importance of resilient energy systems. Microturbines offer a reliable and stable source of power, making them an appealing choice for critical infrastructure, data centers, hospitals, and other essential facilities. Various industries, such as oil and gas, manufacturing, and telecommunications, require continuous and reliable power supply for their operations. These turbines provide a viable solution for meeting these demands, driving their adoption in industrial and commercial sectors. Besides this, in remote or off-grid areas where connecting to the main power grid is challenging or economically unviable, microturbines offer a practical and efficient solution to generate electricity independently. Moreover, many governments around the world are offering various incentives, subsidies, and tax benefits to promote the adoption of renewable and efficient energy technologies. These favorable policies encourage businesses and consumers to invest in microturbine systems, further driving market growth.

Microturbines Market Trends/Drivers:

Growing Demand for Distributed Energy Generation

Distributed energy systems enable localized power generation, reducing the reliance on centralized power plants and long-distance transmission lines. This trend is fueled by the need for greater energy security and resilience, as well as the desire to minimize transmission losses and improve grid efficiency. Microturbines play a vital role in distributed energy solutions due to their compact size, low emissions, and ability to operate on a variety of fuels, including renewable sources like biogas. They are particularly well-suited for commercial and industrial applications where on-site power generation can lead to significant cost savings and operational advantages. Additionally, the flexibility of microturbines allows them to be integrated into microgrids and smart

grid systems, further supporting the transition towards a more decentralized and sustainable energy landscape.

Emphasis on Energy Efficiency and Sustainability

With increasing concerns over climate change and the need to reduce carbon footprints, businesses and industries are seeking cleaner and more efficient technologies. Microturbines fit this requirement by offering higher energy conversion efficiencies compared to conventional power generation methods. Furthermore, they can operate on cleaner fuels like natural gas or biogas, which reduces greenhouse gas emissions and air pollutants. Their ability to capture waste heat for co-generation applications further enhances their energy efficiency, leading to overall resource conservation. As governments and organizations push for sustainable energy practices, microturbines present an attractive option that aligns with their environmental goals while ensuring reliable power supply.

Government Incentives and Support

Many countries and regions offer various financial incentives, tax credits, grants, and rebates to encourage the adoption of renewable and energy-efficient technologies. These favorable policies reduce the upfront costs of acquiring microturbines, making them more economically viable for businesses and consumers. Additionally, supportive regulations and energy standards that promote distributed generation and cleaner technologies create a conducive environment for microturbine deployment. Governments recognize the potential of microturbines to contribute to energy security, grid stability, and reduced emissions, which further motivates their backing. As these policies continue to evolve, the market is expected to witness sustained growth, enabling greater integration of these systems into the energy landscape.

Microturbines Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global microturbine market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on application, power rating and end-user.

Breakup by Application:

Combined Heat and Power (CHP)
Standby Power

Combined heat and power (CHP) dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes combined heat and power (CHP) and standby power. According to the report, combined heat and power represented the largest segment.

CHP systems generate electricity while simultaneously capturing and utilizing the waste heat produced during the generation process. This process significantly increases the overall efficiency of the system, often exceeding 80%, as compared to traditional separate heat and power generation methods, which can have much lower efficiency levels. The high efficiency of CHP systems translates into reduced fuel consumption and lower greenhouse gas emissions, making them an attractive choice for industries and commercial facilities looking to improve their environmental footprint. By utilizing the waste heat for space heating, water heating, or industrial processes, CHP systems offer cost savings and enhance energy utilization, resulting in lower operational expenses for end-users. Moreover, the versatility of CHP systems allows them to be applied across various sectors, including manufacturing, hospitals, universities, district heating, and residential complexes. As governments and industries increasingly prioritize energy efficiency and sustainability, CHP's ability to provide both electricity and heat in an integrated manner positions it as a prominent and viable solution.

Breakup by Power Rating:

12 kW – 50 kW

50 kW – 250 kW

250 kW – 500 kW

12 kW- 50kW hold the largest share in the market

A detailed breakup and analysis of the market based on the power rating has also been provided in the report. This includes 12 kW-50 kW, 50 kW-250 kW, and 250 kW-500 kW. According to the report, 12 kW- 50 kW accounted for the largest market share.

Microturbines falling within 12 kW-50 kW suitable for a diverse range of applications, including small commercial businesses, remote off-grid locations, residential complexes, and small-scale industrial operations. They provide a reliable and consistent power supply without the need for extensive infrastructure, making them an ideal solution for distributed energy generation. Additionally, microturbines in the 12kW to 50kW range are often more cost-effective to install and maintain compared to larger units, making

them financially accessible to a broader market segment. Their compact size and ease of integration allow for flexible installation in various settings. Other than this, advancements in technology have improved the efficiency and performance of microturbines in this power range, enhancing their appeal to customers seeking sustainable and environmentally friendly energy solutions. As a result, the 12kW to 50kW power rating segment stands out as the largest in the market, catering to the energy needs of diverse sectors while offering economic and environmental benefits.

Breakup by End-User:

Residential

Commercial

Industrial

Industrial represents the largest end user segment

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes residential, commercial and industrial. According to the report, industrial represented the largest segment.

Microturbines find extensive use in industrial applications because they offer a reliable and decentralized power generation solution, ensuring uninterrupted production processes. Industries often have high and consistent electricity demands, making them ideal candidates for on-site power generation, which reduces dependence on the grid and minimizes the risk of power outages. Furthermore, microturbines' ability to operate on various fuels, including natural gas and biogas, aligns with the diverse energy needs of different industrial settings. This versatility provides industries with options for selecting the most cost-effective and environmentally friendly fuel sources. Industrial facilities also benefit from the co-generation capability of microturbines, which allows them to utilize waste heat for various heating applications, enhancing overall energy efficiency and lowering operational costs. Additionally, many governments and organizations are placing increasing emphasis on sustainability and environmental responsibility in industrial operations. Microturbines' clean and efficient power generation characteristics align with these objectives, making them an attractive choice for industrial end-users looking to reduce their carbon footprint and comply with environmental regulations.

Breakup by Region:

North America

United States
Canada
Asia Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest microturbine market market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, Others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, Others); Latin America (Brazil, Mexico, Others); and the Middle East and Africa. According to the report, North America was the largest market.

North America has a strong focus on energy efficiency, sustainability, and environmental responsibility. The demand for cleaner and more efficient energy solutions aligns well with the characteristics of microturbines, which offer high energy conversion efficiencies and lower greenhouse gas emissions. Additionally, supportive government policies and incentives play a crucial role in driving the market. Various

federal and state-level programs offer financial incentives, tax credits, and grants to encourage the adoption of renewable and energy-efficient technologies, including microturbines. These initiatives reduce the upfront costs for businesses and consumers, making these turbines more economically viable. Other than this, the region's diverse industrial landscape contributes to the market's growth. They find applications in various sectors, such as oil and gas, manufacturing, healthcare, and data centers, where they serve as reliable on-site power generation solutions, ensuring uninterrupted operations. Moreover, North America's well-developed infrastructure and grid connectivity make it conducive for integrating distributed energy resources like microturbines. The ease of interconnection and compatibility with existing systems further promote the deployment of microturbines in the region.

Competitive Landscape:

The leading companies in the market invest heavily in research and development to improve the efficiency, reliability, and performance of their products. By continuously innovating and introducing cutting-edge technologies, they offer more advanced and competitive solutions to meet the evolving demands of end-users. Additionally, key players often engage in strategic partnerships and collaborations with other industry stakeholders, including energy providers, utilities, and system integrators. These alliances help them expand their market presence, access new distribution channels, and integrate their microturbine solutions into broader energy systems and smart grid initiatives. Other than this, to capitalize on emerging market opportunities, major players actively pursue global expansion strategies. They establish subsidiaries, distribution networks, and service centers in various regions to cater to local demand and provide better customer support. Besides this, key players conduct extensive marketing campaigns to create awareness about the benefits of microturbines, targeting industries, commercial entities, and consumers. These efforts play a crucial role in expanding the overall market by educating potential customers about the advantages of microturbines over conventional power generation methods. In line with this, to build long-term relationships with customers and enhance loyalty, leading companies prioritize after-sales service and technical support. Timely maintenance, spare parts availability, and comprehensive service agreements contribute to customer satisfaction and drive repeat business.

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

Ansaldo Energia SPA

Bladon Jets
Capstone Turbine Corporation
FlexEnergy Inc.
Brayton Energy, LLC
Toyota Motor Corporation
Micro Turbine Technology B.V.
ICR Turbine Engine Corporation
Calnetix Technologies

Recent Developments:

Ansaldo Energia SPA launched AE-T100. The high-frequency electricity produced is converted into either AC or DC power at the specified frequency by the advanced power electronics system. The AE-T100 rotor system consists of a high-speed generator, a compressor, and turbine wheels, all mounted on a single shaft, making it the sole rotating component within the engine.

Bladon Jets and Ryse Energy entered into a significant and strategic partnership to advance clean energy solutions for the off-grid telecommunications sector. This collaboration brings together the expertise and technologies of both companies to address the growing demand for reliable and sustainable power solutions in remote and off-grid locations, particularly within the telecommunications industry.

Capstone green energy C65 microturbine recertified by the stringent California Air Resources Board (CARB). This marks a significant achievement for the company and highlights the turbine's compliance with rigorous environmental standards set by CARB.

Key Questions Answered in This Report:

How has the global microturbine market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global microturbine market?

What is the impact of each driver, restraint, and opportunity on the global microturbine market?

What are the key regional markets?

Which countries represent the most attractive microturbine market?

What is the breakup of the market based on the application?

Which is the most attractive application in the microturbine market?

What is the breakup of the market based on the power rating?

Which is the most attractive power rating in the microturbine market?

What is the breakup of the market based on the end-user?

Which is the most attractive end-user in the microturbine market?

What is the competitive structure of the global microturbine market?

Who are the key players/companies in the global microturbine market?

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