

Global 300-700MW Steam Turbine Generator Rotor Forging Market Growth 2026-2032

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Abstracts

The global 300-700MW Steam Turbine Generator Rotor Forging market size is predicted to grow from US\$ 196 million in 2025 to US\$ 536 million in 2032; it is expected to grow at a CAGR of 15.6% from 2026 to 2032.

300-700MW steam turbine generator rotor forging refers to a rotor forging integrally formed from high-purity alloy steel ingots via open-die forging, specifically designed for subcritical, supercritical and some ultra-supercritical thermal power units in the power range of 300MW to 700MW, including steam turbine rotor bodies and generator rotors. Operating speeds are 1500 r/min (half-speed) or 3000 r/min (full speed), with service temperatures of 400-565°C, and rotor weights approximately 30-80 tons. These rotor forgings are the preferred core components for coal-fired power unit replacement, flexibility retrofits and overseas conventional thermal power markets, and serve as the standardised, high-turnover flagship product range for large casting & forging manufacturers worldwide. The industrial significance lies in the fact that the 300-700MW range represents the largest installed capacity, the greatest number of existing units, and the most active segment for new coal-fired projects, making its rotor forgings a critical determinant of safety, economy and service life for this class of units. The supply-demand dynamics of this segment reflect the backbone of the global coal-fired power equipment industry and serve as a key benchmark for a nation's heavy forging capability – from –able to make? to –stable batch supply?.

300-700MW steam turbine generator rotor forgings represent the largest installed base and most active replacement segment in thermal power equipment. A complete set of rotor forgings (HP-IP, LP and generator rotors) typically costs USD 2-4 million, depending on material grade (conventional Cr-Mo-V vs. FB2) and supplier qualification. Japan Steel Works, with its extreme manufacturing capability and

long-standing dominance in nuclear and thermal rotors, commands gross margins exceeding 40%. China First Heavy Industries and Sinomach Heavy have raised their margins to 25-35% through domestic breakthroughs in FB2 rotors and monoblock LP rotors for nuclear units, while newer entrants like Taiyuan Heavy struggle with margins below 20% due to long certification cycles and capacity ramp-up. Downstream demand is driven by three forces: new plant construction in emerging markets (SE Asia, Africa, Middle East) where 300-700MW units remain the sweet spot; a wave of life-extension replacements in China, where hundreds of 300-600MW units installed between 1995-2010 are reaching 25-30 years of service; and flexibility retrofits of existing units to accommodate high shares of renewable energy, which often require rotor upgrades. In the competitive landscape, Japan Steel Works remains the global pricing and process benchmark, while China First Heavy Industries and Sinomach Heavy, with their batch FB2 supply capability and nuclear forging experience, are gradually eating into its mid-range market share. Doosan Enerbility stays competitive in Korea and selected export markets; Indian players such as Bharat Forge compete on price in low-end Middle East and African markets. Uncertainties include long-term policy pressures on new coal-fired power projects, although replacement and flexibility retrofits will sustain demand for 5-10 years; and the challenge of developing next-generation heat-resistant steels for >620°C units – if domestic R&D lags, the high-end segment may remain dependent on Japan Steel Works. Conclusion: The 300-700MW steam turbine generator rotor forging market is a stable segment propelled by three drivers – capacity expansion in developing regions, replacement of ageing units (led by China's large installed base), and flexibility upgrades. In the medium term, it benefits from China's massive replacement wave; in the long term, it faces headwinds from global coal-phase-down policies. Domestic breakthroughs in high-end FB2 and above rotors have been achieved, but fully substituting Japan Steel Works will still take years of operational validation.

LP Information, Inc. (LPI) ' newest research report, the "300-700MW Steam Turbine Generator Rotor Forging Industry Forecast" looks at past sales and reviews total world 300-700MW Steam Turbine Generator Rotor Forging sales in 2025, providing a comprehensive analysis by region and market sector of projected 300-700MW Steam Turbine Generator Rotor Forging sales for 2026 through 2032. With 300-700MW Steam Turbine Generator Rotor Forging sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world 300-700MW Steam Turbine Generator Rotor Forging industry.

This Insight Report provides a comprehensive analysis of the global 300-700MW Steam Turbine Generator Rotor Forging landscape and highlights key trends related to product

segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 300-700MW Steam Turbine Generator Rotor Forging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 300-700MW Steam Turbine Generator Rotor Forging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 300-700MW Steam Turbine Generator Rotor Forging and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 300-700MW Steam Turbine Generator Rotor Forging.

This report presents a comprehensive overview, market shares, and growth opportunities of 300-700MW Steam Turbine Generator Rotor Forging market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

HP/IP Combined Rotor

LP Rotor

Generator Rotor

Segmentation by Material System:

Conventional Cr-Mo-V (566°C)

FB2 (9Cr Martensitic, 620°C)

Nickel-Based / Advanced

Segmentation by Application:

New Plant Construction (Capacity Expansion)

Aged Unit Replacement (Life Extension)

Performance Upgrade (Efficiency/Flexibility)

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Japan Steel Works

Doosan Enerbility

China First Heavy Industries

Sinomach Heavy Equipment Group

Taiyuan Heavy Industry

Bharat Forge

Larsen & Toubro

Japan Casting & Forging

Shanghai Electric (SCF)

Dongfang Electric

Kobe Steel

ATI

Scot Forge

Bruck GmbH

Siempelkamp Giesserei

Key Questions Addressed in this Report

What is the 10-year outlook for the global 300-700MW Steam Turbine Generator Rotor Forging market?

What factors are driving 300-700MW Steam Turbine Generator Rotor Forging market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 300-700MW Steam Turbine Generator Rotor Forging market opportunities vary by end market size?

How does 300-700MW Steam Turbine Generator Rotor Forging break out by Type, by Application?

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