

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market Growth 2026-2032

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Abstracts

The global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market size is predicted to grow from US\$ 35.22 million in 2025 to US\$ 78.22 million in 2032; it is expected to grow at a CAGR of 10.9% from 2026 to 2032.

A large steam turbine and electric motor dual drive air separation compressor trains is a high-power, integrated turbomachinery system that provides feed-air compression and air boosting for large cryogenic air separation units. Its defining feature is that an industrial steam turbine and a high-power electric motor can independently or jointly deliver mechanical power to the same compressor shaft train, with the power split dynamically adjusted according to steam availability, electrical load, plant output, and operating cost. The system mainly consists of an axial-flow or centrifugal main air compressor, an integrally geared air booster compressor, an industrial steam turbine, a synchronous motor or integrated motor-generator, a gearbox, a variable-speed clutch, couplings, a lubrication oil system, a cooling system, a sealing system, an anti-surge system, a shaft monitoring system, and a coordinated steam-electric control system. Typical configurations include a standalone main air compressor, a combined main air compressor and booster compressor arrangement, and an integrated air compression and boosting configuration. The manufacturing process covers aerodynamic and thermodynamic design, rotor-dynamic analysis, precision machining of impellers and rotors, steam-turbine flow-path design, large-motor matching, torsional vibration analysis of the shaft train, complete machine assembly, mechanical running tests, and coordinated control logic commissioning. Key specifications include the oxygen production capacity of the supporting air separation unit, inlet air flow, discharge pressure, pressure ratio, drive power, isothermal efficiency, steam-turbine inlet and

exhaust parameters, motor voltage and speed, shaft critical speed, surge margin, vibration level, and continuous operating reliability. Large compressor trains are generally used with air separation units having a nominal oxygen production capacity of 40,000 standard cubic meters per hour or above. Main air flow can range from several hundred thousand to one million cubic meters per hour, while drive power is typically between 20 MW and 120 MW. The core function of the system is to ensure continuous and stable air supply for the air separation unit while directly utilizing by-product steam or waste-heat steam, thereby reducing the intermediate conversion losses associated with steam power generation followed by electrical drive. It also enables efficient operation under fluctuating steam supply, peak-valley electricity pricing, and variable plant load conditions. The system is mainly used in coal chemicals, synthetic ammonia, methanol production, non-ferrous metal smelting, iron and steel, integrated refining and petrochemical complexes, and large industrial gas projects. In 2025, the average gross margin of the global large steam turbine and electric motor dual drive air separation compressor trains industry was approximately 25% to 35%.

The value chain for large steam turbine and electric motor dual drive air separation compressor trains has the characteristics of a high end engineered equipment industry rather than a standardized compressor market. The upstream segment supplies large forgings and castings, alloy steel rotor materials, precision impellers, high speed gears, journal bearings, dry gas seals, variable speed clutches, high power synchronous motors, valves, sensors and control hardware. The midstream segment performs aerodynamic design, thermal calculation, rotor dynamic analysis, torsional vibration assessment, precision machining, steam turbine matching, train assembly, mechanical testing and integrated control validation. The highest value is created through system engineering, common shaft stability, compressor efficiency across a wide operating range and the ability to guarantee continuous operation. The downstream segment consists mainly of coal chemical plants, ammonia and methanol facilities, nonferrous metal smelters, steel complexes, refineries and industrial gas projects. Purchasing decisions are normally made together with the design of the complete air separation unit and the plant steam network. Competition therefore depends less on the isolated efficiency of one compressor and more on the supplier's ability to coordinate steam, electricity, compression duty and overall plant energy balance. Suppliers with large test stands, advanced machining capability, proven rotor systems and extensive field service resources have a structural advantage in major projects.

Global supply is concentrated within a limited number of heavy turbomachinery manufacturing systems in Europe, China, Japan and North America, although publicly confirmed commercial projects using coordinated steam turbine and electric motor

drives remain scarce. European suppliers have strong capabilities in axial compressors, integrally geared compressors, industrial steam turbines and international service networks. Chinese manufacturers have developed clearer dual drive applications through domestic coal chemical, nonferrous metal and large air separation projects. Japanese manufacturers retain established positions in steel related oxygen production and large centrifugal compressor applications, while North American suppliers are more strongly represented in electrically driven centrifugal compressors and medium scale air separation equipment. The supply chain is gradually moving away from a model based entirely on cross border shipment of complete machinery. Major projects increasingly combine global sourcing of critical components with regional assembly, commissioning, spare parts support and long term maintenance. Local service capacity has become particularly important because shutdown costs for a large air separation unit are high and replacement parts can require long manufacturing lead times. Merger and acquisition activity in the broader sector has focused on expanding compressor portfolios, digital service capability and international repair networks rather than creating a separate group of specialized dual drive brands.

Demand is concentrated in process industries that combine continuous large scale oxygen consumption with a stable source of byproduct steam. Coal chemical and ammonia projects require uninterrupted oxygen and nitrogen supply for gasification, synthesis and purification processes. Nonferrous metal smelters and steel plants create demand through oxygen enriched production, replacement of older oxygen plants and optimization of steam networks. Refining, petrochemical and industrial gas projects place greater emphasis on flexible load operation, multiple plant supply and control of total energy cost. Demand will not be evenly distributed across all new large air separation projects. Facilities with abundant low cost electricity, increasing access to renewable power or an unstable steam balance may continue to select fully electric compressor trains. Dual drive systems are more attractive where steam would otherwise be converted into electricity at lower overall efficiency, where electrical peak demand is expensive, or where steam production varies with the operating rate of another process unit. Product development is moving toward larger flow capacity, higher shaft power, integrated main air and booster compression, variable speed regulation and automated power sharing. Remote condition monitoring, performance optimization, digital twins and predictive maintenance are also becoming more closely connected to the original equipment contract and the long term service relationship.

Energy efficiency policy, industrial equipment renewal and process energy system optimization provide a supportive environment for the sector. Current policy direction encourages the recovery and direct utilization of high pressure and low pressure steam,

waste heat and residual pressure, together with the adoption of large efficient compressors and other advanced energy saving equipment. Capital expenditure for efficiency upgrades in existing chemical, steel and nonferrous metal facilities is likely to provide a more stable source of demand than construction of entirely new capacity. Manufacturing investment is increasingly directed toward large mechanical test facilities, advanced five axis machining centres, digital assembly systems and integrated control platforms. New product development is placing greater emphasis on high power drive systems, broad operating range efficiency, rapid load transfer and coordination among several energy sources. The long term outlook is positive but remains subject to the characteristics of a project based and low volume market, where individual orders can create significant annual fluctuations. Improvements in fully electric compressor efficiency, declining renewable electricity costs and changes in the economic value of steam will limit universal adoption. Dual drive technology is therefore expected to remain a specialized energy optimization solution for selected energy intensive process plants rather than becoming the standard configuration for every large air separation unit.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Industry Forecast" looks at past sales and reviews total world Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains sales in 2025, providing a comprehensive analysis by region and market sector of projected Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains sales for 2026 through 2032. With Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains industry.

This Insight Report provides a comprehensive analysis of the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains 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 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains.

This report presents a comprehensive overview, market shares, and growth opportunities of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Main Air Compressor Dual-Drive Train

Integrated Main Air and Booster Dual-Drive Train

Others

Segmentation by ASU Oxygen Capacity:

40,000 to Less Than 60,000 Nm³/h

60,000 to Less Than 100,000 Nm³/h

100,000 Nm³/h and Above

Segmentation by Total Drive Power:

Less Than 20 MW

20 MW to Less Than 40 MW

40 MW to Less Than 80 MW

80 MW and Above

Segmentation by Application:

Coal Chemicals

Refining and Petrochemicals

Iron and Steel

Nonferrous Metals

Industrial Gas Supply

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.

Xi'an Shaangu Power Co., Ltd.

Everllence SE

Siemens Energy AG

Shenyang Blower Works Group Corporation

Atlas Copco Gas and Process

Kobe Steel, Ltd.

Mitsubishi Heavy Industries Compressor Corporation

Hanwha Power Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market?

What factors are driving Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market growth, globally and by region?

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

How do Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains market opportunities vary by end market size?

How does Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains by Country/Region, 2021, 2025 & 2032

2.2 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Segment by Type

2.2.1 Main Air Compressor Dual-Drive Train

2.2.2 Integrated Main Air and Booster Dual-Drive Train

2.2.3 Others

2.2.4 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type

2.2.4.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

2.2.4.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue and Market Share by Type (2021-2026)

2.2.4.3 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Type (2021-2026)

2.3 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Segment by ASU Oxygen Capacity

2.3.1 40,000 to Less Than 60,000 Nm³/h

2.3.2 60,000 to Less Than 100,000 Nm³/h

2.3.3 100,000 Nm³/h and Above

2.3.4 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by ASU Oxygen Capacity

2.3.4.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by ASU Oxygen Capacity (2021-2026)

2.3.4.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue and Market Share by ASU Oxygen Capacity (2021-2026)

2.3.4.3 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by ASU Oxygen Capacity (2021-2026)

2.4 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Segment by Total Drive Power

2.4.1 Less Than 20 MW

2.4.2 20 MW to Less Than 40 MW

2.4.3 40 MW to Less Than 80 MW

2.4.4 80 MW and Above

2.4.5 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Total Drive Power

2.4.5.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Total Drive Power (2021-2026)

2.4.5.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue and Market Share by Total Drive Power (2021-2026)

2.4.5.3 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Total Drive Power (2021-2026)

2.5 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Segment by Application

2.5.1 Coal Chemicals

2.5.2 Refining and Petrochemicals

2.5.3 Iron and Steel

2.5.4 Nonferrous Metals

2.5.5 Industrial Gas Supply

2.5.6 Others

2.5.7 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application

2.5.7.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Market Share by Application (2021-2026)

2.5.7.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Breakdown Data by Company

3.1.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Sales by Company (2021-2026)

3.1.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Company (2021-2026)

3.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Revenue by Company (2021-2026)

3.2.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Company (2021-2026)

3.2.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Company (2021-2026)

3.3 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Company

3.4 Key Manufacturers Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Location Distribution

3.4.2 Players Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR LARGE STEAM-TURBINE AND ELECTRIC-MOTOR DUAL-DRIVE AIR SEPARATION COMPRESSOR TRAINS BY GEOGRAPHIC REGION

4.1 World Historic Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market Size by Geographic Region (2021-2026)

4.1.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Market Size by Country/Region (2021-2026)
4.2.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Annual Sales by Country/Region (2021-2026)
4.2.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Annual Revenue by Country/Region (2021-2026)
4.3 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales Growth
4.4 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales Growth
4.5 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales Growth
4.6 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air
Separation Compressor Trains Sales Growth

5 AMERICAS

5.1 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Country
5.1.1 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Country (2021-2026)
5.1.2 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Revenue by Country (2021-2026)
5.2 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Type (2021-2026)
5.3 Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Region
6.1.1 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation
Compressor Trains Sales by Region (2021-2026)

6.1.2 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Region (2021-2026)

6.2 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026)

6.3 APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains by Country

7.1.1 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country (2021-2026)

7.1.2 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Country (2021-2026)

7.2 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026)

7.3 Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains by Country

8.1.1 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country (2021-2026)

8.1.2 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Revenue by Country (2021-2026)

8.2 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Sales by Type (2021-2026)

8.3 Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

10.3 Manufacturing Process Analysis of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

10.4 Industry Chain Structure of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Distributors

11.3 Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Customer

12 WORLD FORECAST REVIEW FOR LARGE STEAM-TURBINE AND ELECTRIC-MOTOR DUAL-DRIVE AIR SEPARATION COMPRESSOR TRAINS BY

Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market Growth 2026-2...

GEOGRAPHIC REGION

12.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market Size Forecast by Region

12.1.1 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Forecast by Region (2027-2032)

12.1.2 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Forecast by Type (2027-2032)

12.7 Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Xi'an Shaangu Power Co., Ltd.

13.1.1 Xi'an Shaangu Power Co., Ltd. Company Information

13.1.2 Xi'an Shaangu Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.1.3 Xi'an Shaangu Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Xi'an Shaangu Power Co., Ltd. Main Business Overview

13.1.5 Xi'an Shaangu Power Co., Ltd. Latest Developments

13.2 Everllence SE

13.2.1 Everllence SE Company Information

13.2.2 Everllence SE Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.2.3 Everllence SE Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Everllence SE Main Business Overview

13.2.5 Everllence SE Latest Developments

13.3 Siemens Energy AG

13.3.1 Siemens Energy AG Company Information

13.3.2 Siemens Energy AG Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Product Portfolios and Specifications

13.3.3 Siemens Energy AG Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Siemens Energy AG Main Business Overview

13.3.5 Siemens Energy AG Latest Developments

13.4 Shenyang Blower Works Group Corporation

13.4.1 Shenyang Blower Works Group Corporation Company Information

13.4.2 Shenyang Blower Works Group Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.4.3 Shenyang Blower Works Group Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Shenyang Blower Works Group Corporation Main Business Overview

13.4.5 Shenyang Blower Works Group Corporation Latest Developments

13.5 Atlas Copco Gas and Process

13.5.1 Atlas Copco Gas and Process Company Information

13.5.2 Atlas Copco Gas and Process Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.5.3 Atlas Copco Gas and Process Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Atlas Copco Gas and Process Main Business Overview

13.5.5 Atlas Copco Gas and Process Latest Developments

13.6 Kobe Steel, Ltd.

13.6.1 Kobe Steel, Ltd. Company Information

13.6.2 Kobe Steel, Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.6.3 Kobe Steel, Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Kobe Steel, Ltd. Main Business Overview

13.6.5 Kobe Steel, Ltd. Latest Developments

13.7 Mitsubishi Heavy Industries Compressor Corporation

13.7.1 Mitsubishi Heavy Industries Compressor Corporation Company Information

13.7.2 Mitsubishi Heavy Industries Compressor Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

13.7.3 Mitsubishi Heavy Industries Compressor Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales, Revenue, Price and

Gross Margin (2021-2026)

13.7.4 Mitsubishi Heavy Industries Compressor Corporation Main Business Overview

13.7.5 Mitsubishi Heavy Industries Compressor Corporation Latest Developments

13.8 Hanwha Power Co., Ltd.

13.8.1 Hanwha Power Co., Ltd. Company Information

13.8.2 Hanwha Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive
Air Separation Compressor Trains Product Portfolios and Specifications

13.8.3 Hanwha Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive
Air Separation Compressor Trains Sales, Revenue, Price and Gross Margin
(2021-2026)

13.8.4 Hanwha Power Co., Ltd. Main Business Overview

13.8.5 Hanwha Power Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Main Air Compressor Dual-Drive Train

Table 4. Major Players of Integrated Main Air and Booster Dual-Drive Train

Table 5. Major Players of Others

Table 6. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026) & (Units)

Table 7. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

Table 8. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Type (2021-2026)

Table 10. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 11. Major Players of 40,000 to Less Than 60,000 Nm³/h

Table 12. Major Players of 60,000 to Less Than 100,000 Nm³/h

Table 13. Major Players of 100,000 Nm³/h and Above

Table 14. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by ASU Oxygen Capacity (2021-2026) & (Units)

Table 15. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by ASU Oxygen Capacity (2021-2026)

Table 16. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by ASU Oxygen Capacity (2021-2026) & (\$ million)

Table 17. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by ASU Oxygen Capacity (2021-2026)

Table 18. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by ASU Oxygen Capacity (2021-2026) & (K US\$/Unit)

Table 19. Major Players of Less Than 20 MW

Table 20. Major Players of 20 MW to Less Than 40 MW

Table 21. Major Players of 40 MW to Less Than 80 MW

Table 22. Major Players of 80 MW and Above
Table 23. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Total Drive Power (2021-2026) & (Units)
Table 24. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Total Drive Power (2021-2026)
Table 25. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Total Drive Power (2021-2026) & (\$ million)
Table 26. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Total Drive Power (2021-2026)
Table 27. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Total Drive Power (2021-2026) & (K US\$/Unit)
Table 28. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale by Application (2021-2026) & (Units)
Table 29. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Market Share by Application (2021-2026)
Table 30. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Application (2021-2026) & (\$ million)
Table 31. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Application (2021-2026)
Table 32. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Application (2021-2026) & (K US\$/Unit)
Table 33. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Company (2021-2026) & (Units)
Table 34. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Company (2021-2026)
Table 35. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Company (2021-2026) & (\$ millions)
Table 36. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Company (2021-2026)
Table 37. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Price by Company (2021-2026) & (K US\$/Unit)
Table 38. Key Manufacturers Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Producing Area Distribution and Sales Area
Table 39. Players Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Products Offered
Table 40. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 41. New Products and Potential Entrants
Table 42. Market M&A Activity & Strategy

Table 43. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Geographic Region (2021-2026) & (Units)

Table 44. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share Geographic Region (2021-2026)

Table 45. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 46. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Geographic Region (2021-2026)

Table 47. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country/Region (2021-2026) & (Units)

Table 48. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country/Region (2021-2026)

Table 49. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Country/Region (2021-2026) & (\$ millions)

Table 50. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Country/Region (2021-2026)

Table 51. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country (2021-2026) & (Units)

Table 52. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country (2021-2026)

Table 53. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Country (2021-2026) & (\$ millions)

Table 54. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026) & (Units)

Table 55. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application (2021-2026) & (Units)

Table 56. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Region (2021-2026) & (Units)

Table 57. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Region (2021-2026)

Table 58. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Region (2021-2026) & (\$ millions)

Table 59. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026) & (Units)

Table 60. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application (2021-2026) & (Units)

Table 61. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country (2021-2026) & (Units)

Table 62. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Revenue by Country (2021-2026) & (\$ millions)

Table 63. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sales by Type (2021-2026) & (Units)

Table 64. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sales by Application (2021-2026) & (Units)

Table 65. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Country (2021-2026) & (Units)

Table 66. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Country (2021-2026)

Table 67. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Type (2021-2026) & (Units)

Table 68. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Application (2021-2026) & (Units)

Table 69. Key Market Drivers & Growth Opportunities of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Table 70. Key Market Challenges & Risks of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Table 71. Key Industry Trends of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Table 72. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Raw Material

Table 73. Key Suppliers of Raw Materials

Table 74. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Distributors List

Table 75. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Customer List

Table 76. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Forecast by Region (2027-2032) & (Units)

Table 77. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Forecast by Country (2027-2032) & (Units)

Table 79. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Forecast by Region (2027-2032) & (Units)

Table 81. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 82. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sales Forecast by Country (2027-2032) & (Units)

Table 83. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Sales Forecast by Country (2027-2032) & (Units)

Table 85. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sales Forecast by Type (2027-2032) & (Units)

Table 87. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 88. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Sales Forecast by Application (2027-2032) & (Units)

Table 89. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 90. Xi'an Shaangu Power Co., Ltd. Basic Information, Large Steam-Turbine and

Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 91. Xi'an Shaangu Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 92. Xi'an Shaangu Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 93. Xi'an Shaangu Power Co., Ltd. Main Business

Table 94. Xi'an Shaangu Power Co., Ltd. Latest Developments

Table 95. Everllence SE Basic Information, Large Steam-Turbine and Electric-Motor

Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 96. Everllence SE Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 97. Everllence SE Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 98. Everllence SE Main Business

Table 99. Everllence SE Latest Developments

Table 100. Siemens Energy AG Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 101. Siemens Energy AG Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Product Portfolios and Specifications

Table 102. Siemens Energy AG Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 103. Siemens Energy AG Main Business

Table 104. Siemens Energy AG Latest Developments

Table 105. Shenyang Blower Works Group Corporation Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 106. Shenyang Blower Works Group Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 107. Shenyang Blower Works Group Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 108. Shenyang Blower Works Group Corporation Main Business

Table 109. Shenyang Blower Works Group Corporation Latest Developments

Table 110. Atlas Copco Gas and Process Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 111. Atlas Copco Gas and Process Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 112. Atlas Copco Gas and Process Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 113. Atlas Copco Gas and Process Main Business

Table 114. Atlas Copco Gas and Process Latest Developments

Table 115. Kobe Steel, Ltd. Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 116. Kobe Steel, Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 117. Kobe Steel, Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 118. Kobe Steel, Ltd. Main Business

Table 119. Kobe Steel, Ltd. Latest Developments

Table 120. Mitsubishi Heavy Industries Compressor Corporation Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Manufacturing Base, Sales Area and Its Competitors

Table 121. Mitsubishi Heavy Industries Compressor Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 122. Mitsubishi Heavy Industries Compressor Corporation Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 123. Mitsubishi Heavy Industries Compressor Corporation Main Business

Table 124. Mitsubishi Heavy Industries Compressor Corporation Latest Developments

Table 125. Hanwha Power Co., Ltd. Basic Information, Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Manufacturing Base, Sales Area and Its Competitors

Table 126. Hanwha Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Product Portfolios and Specifications

Table 127. Hanwha Power Co., Ltd. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 128. Hanwha Power Co., Ltd. Main Business

Table 129. Hanwha Power Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Figure 2. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country/Region (2025)

Figure 10. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Main Air Compressor Dual-Drive Train

Figure 12. Product Picture of Integrated Main Air and Booster Dual-Drive Train

Figure 13. Product Picture of Others

Figure 14. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type in 2026

Figure 15. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Type (2021-2026)

Figure 16. Product Picture of 40,000 to Less Than 60,000 Nm³/h

Figure 17. Product Picture of 60,000 to Less Than 100,000 Nm³/h

Figure 18. Product Picture of 100,000 Nm³/h and Above

Figure 19. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by ASU Oxygen Capacity in 2026

Figure 20. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by ASU Oxygen Capacity (2021-2026)

Figure 21. Product Picture of Less Than 20 MW

Figure 22. Product Picture of 20 MW to Less Than 40 MW

Figure 23. Product Picture of 40 MW to Less Than 80 MW

Figure 24. Product Picture of 80 MW and Above

Figure 25. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Total Drive Power in 2026

Figure 26. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Total Drive Power (2021-2026)

Figure 27. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Coal Chemicals

Figure 28. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Coal Chemicals (2021-2026) & (Units)

Figure 29. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Refining and Petrochemicals

Figure 30. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Refining and Petrochemicals (2021-2026) & (Units)

Figure 31. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Iron and Steel

Figure 32. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Iron and Steel (2021-2026) & (Units)

Figure 33. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Nonferrous Metals

Figure 34. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Nonferrous Metals (2021-2026) & (Units)

Figure 35. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Industrial Gas Supply

Figure 36. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Industrial Gas Supply (2021-2026) & (Units)

Figure 37. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Consumed in Others

Figure 38. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Market: Others (2021-2026) & (Units)

Figure 39. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sale Market Share by Application (2025)

Figure 40. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Application in 2025

Figure 41. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales by Company in 2025 (Units)

Figure 42. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Company in 2025

Figure 43. Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue by Company in 2025 (\$ millions)

Figure 44. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation

Compressor Trains Revenue Market Share by Company in 2025

Figure 45. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Geographic Region (2021-2026)

Figure 46. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Geographic Region in 2025

Figure 47. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales 2021-2026 (Units)

Figure 48. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue 2021-2026 (\$ millions)

Figure 49. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales 2021-2026 (Units)

Figure 50. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue 2021-2026 (\$ millions)

Figure 51. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales 2021-2026 (Units)

Figure 52. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue 2021-2026 (\$ millions)

Figure 53. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales 2021-2026 (Units)

Figure 54. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue 2021-2026 (\$ millions)

Figure 55. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country in 2025

Figure 56. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Country (2021-2026)

Figure 57. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

Figure 58. Americas Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Application (2021-2026)

Figure 59. United States Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 60. Canada Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 61. Mexico Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 62. Brazil Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 63. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Region in 2025

Figure 64. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Region (2021-2026)

Figure 65. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

Figure 66. APAC Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Application (2021-2026)

Figure 67. China Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 68. Japan Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 69. South Korea Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 70. Southeast Asia Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 71. India Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 72. Australia Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 73. China Taiwan Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 74. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Country in 2025

Figure 75. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share by Country (2021-2026)

Figure 76. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

Figure 77. Europe Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Application (2021-2026)

Figure 78. Germany Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 79. France Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 80. UK Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 81. Italy Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 82. Russia Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 83. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air

Separation Compressor Trains Sales Market Share by Country (2021-2026)

Figure 84. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Type (2021-2026)

Figure 85. Middle East & Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share by Application (2021-2026)

Figure 86. Egypt Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 87. South Africa Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 88. Israel Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 89. Turkey Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 90. GCC Countries Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Growth 2021-2026 (\$ millions)

Figure 91. Manufacturing Cost Structure Analysis of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains in 2026

Figure 92. Manufacturing Process Analysis of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Figure 93. Industry Chain Structure of Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains

Figure 94. Channels of Distribution

Figure 95. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Forecast by Region (2027-2032)

Figure 96. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share Forecast by Region (2027-2032)

Figure 97. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share Forecast by Type (2027-2032)

Figure 98. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share Forecast by Type (2027-2032)

Figure 99. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Sales Market Share Forecast by Application (2027-2032)

Figure 100. Global Large Steam-Turbine and Electric-Motor Dual-Drive Air Separation Compressor Trains Revenue Market Share Forecast by Application (2027-2032)

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