

Global Reversible Pump-Turbine Market Growth 2026-2032

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Abstracts

The global Reversible Pump-Turbine market size is predicted to grow from US\$ 2242 million in 2025 to US\$ 3756 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 2032.

Reversible pump-turbines are large hydraulic machines used in pumped-storage power plants to perform both pumping and power-generation functions through a common runner, guide-vane system and hydraulic passage. In pumping mode, the machine is driven by a motor-generator to transfer water from a lower reservoir to an upper reservoir; in generating mode, water released from the upper reservoir drives the same machine to produce mechanical power for electricity generation. The market focuses on complete reversible pump-turbines and directly associated hydraulic-mechanical packages, including runners, shafts, wicket gates, stay rings, spiral casings, head covers, bottom rings, shaft seals and integrated hydraulic components, together with inseparable hydraulic design, model testing, commissioning and performance-verification services. Major product configurations include reversible Francis, Deriaz and axial-flow designs; single-stage and multi-stage structures; fixed-speed and variable-speed arrangements; and vertical- or horizontal-shaft units. Key applications include new large-scale pumped-storage plants, distributed and small-scale pumped storage, conversion of conventional hydropower facilities, and modernization or major component replacement for operating units.

Key Findings

2025 global average selling price was approximately US\$20–25 million per unit.

The industry's overall gross margin remained at approximately 22%–28% in

2025. Reversible Francis pump-turbines remain the dominant product type. 300–500 MW is the mainstream capacity range for large new-build units. Variable-speed pump-turbines occupy a higher-value technology segment. New large-scale pumped-storage plants remain the largest application market. Asia-Pacific remains the largest regional demand market. High-head, wide-head-range, and variable-speed products have relatively high technical barriers.

Market Trends

Product development is shifting from a primary focus on rated output toward greater operational flexibility, wider stable operating ranges and improved performance under frequent starts, stops and mode transitions. Variable-speed technology is becoming more important because it enables adjustable pumping power, wider turbine operating ranges and stronger bidirectional frequency support. Current supplier programs also emphasize wide-head-range hydraulic design, high-head operation, higher rotational speed, lower pressure pulsation and improved stability outside the best-efficiency point. Recent variable-speed project awards and modernization contracts indicate that this technology is moving beyond a limited number of flagship installations into a broader range of new-build and retrofit projects.

Large reversible Francis units remain the principal product form, while specialized opportunities are emerging for smaller variable-speed equipment, underground schemes, mine-pit projects and conversions of existing hydropower infrastructure. Digital hydraulic simulation, model testing, precision manufacturing and condition monitoring are becoming more deeply integrated into product development. Updated technical standards for Francis pump-turbines and installation procedures also reflect the industry's increasing focus on operating stability, manufacturing quality and lifecycle performance.

Market Dynamics

Demand is supported by the need for dispatchable capacity, long-duration storage and grid flexibility, but market revenue remains project-driven and uneven across individual years. Reversible pump-turbines are customized for specific head, flow, reservoir and operating conditions, and equipment contracts commonly extend across several years from hydraulic design and model testing to manufacturing, shipment and commissioning. Consequently, annual manufacturer revenue is determined not only by newly commissioned capacity but also by the execution stage of projects scheduled to enter operation in later years.

The market combines strong long-term demand visibility with high short-term order volatility. A large global construction pipeline supports manufacturing activity, but individual projects remain exposed to permitting, geology, civil construction progress, financing conditions and grid-connection schedules. Equipment suppliers with diversified geographic exposure, established model-testing capabilities and a balanced mix of new-build and modernization business are therefore better positioned to manage project-cycle fluctuations.

Drivers

The primary market driver is the rapid expansion of variable renewable generation, which increases the need for large-scale resources capable of absorbing surplus electricity and delivering power during periods of lower wind and solar output. Pumped storage can provide peak shaving, valley filling, frequency regulation, operating reserve, voltage support, black start and long-duration energy shifting through the same facility. The International Energy Agency forecasts annual pumped-storage additions to reach 16.5 GW by 2030, with China accounting for more than 60% of worldwide growth during the forecast period.

National energy-security policies and power-system reliability requirements provide a second major driver. Pumped storage is a mature form of long-duration storage that can support flexibility over periods extending from hours to days, while its large rotating equipment can also contribute inertia and system-restoration capability. These characteristics strengthen the role of reversible pump-turbines as renewable penetration rises and conventional synchronous generation is gradually displaced.

Restraints

The principal restraint is the long and capital-intensive development cycle of pumped-storage projects. Suitable sites require adequate elevation difference, geological stability, water availability, transmission access and acceptable environmental and social impacts. Project approval, reservoir construction and underground civil works can take considerably longer than equipment manufacturing, creating uncertainty in tender timing and order conversion.

The equipment market also faces price pressure from competitive procurement and increasing localization. Standard large-capacity projects can generate substantial volumes but may offer lower unit pricing than technically complex high-head, variable-

speed or modernization projects. Because complete project contracts often combine hydraulic machinery, motor-generators, electrical systems and auxiliary equipment, manufacturers must also manage contract-boundary risk, cost escalation and milestone-based revenue recognition.

Opportunities

The largest opportunity remains the supply of complete reversible pump-turbines for new large-scale pumped-storage plants. With 243 GW of capacity already under construction worldwide, the addressable manufacturing pipeline extends well beyond projects entering service in the immediate year. High-head sites, wide-head-variation projects and systems requiring adjustable pumping power provide additional opportunities for advanced hydraulic designs and variable-speed equipment.

A second opportunity comes from the modernization of the existing fleet. Older plants increasingly require runner replacement, efficiency improvement, operating-range expansion, stability enhancement and adaptation to more frequent cycling. Conversion of conventional hydropower facilities and utilization of existing reservoirs can reduce part of the civil-infrastructure requirement, while distributed and small-scale pumped-storage projects may create a specialized market for lower-output, modular and variable-speed machines.

Challenges

Reversible pump-turbines operate under more complex hydraulic conditions than conventional generating-only turbines. Suppliers must control cavitation, pressure pulsation, pump-mode hump characteristics, instability in the turbine S-shaped region, hydraulic thrust and mechanical stress during rapid mode transitions. These challenges become more demanding at higher heads, higher rotational speeds and wider operating ranges.

The industry also faces a limited global pool of qualified hydraulic designers, model laboratories and heavy-manufacturing facilities. Large runners, stay rings and spiral casings require specialized casting, welding, heat treatment, precision machining and transport capabilities. Variable-speed projects add further integration requirements between the hydraulic machine, motor-generator, converter and control system, increasing interface-management and commissioning risks.

Industry Chain Analysis

The upstream industry includes high-grade steel plate, stainless steel, cast and forged components, welding materials, bearings, seals, coatings, control components and large machining equipment. Critical upstream products include runner castings or welded runner sections, large shafts, guide-vane assemblies, stay rings and spiral-casing structures. Quality consistency, traceability and heavy-component manufacturing capacity are more important than simple material cost because defects can affect efficiency, vibration, fatigue life and project schedules.

The midstream consists of hydraulic design, computational simulation, model testing, detailed engineering, component manufacturing, factory assembly, logistics, installation supervision and commissioning. Downstream participants include pumped-storage developers, electric utilities, independent power producers, hydropower operators, engineering contractors and grid companies. Procurement decisions are influenced by lifecycle efficiency, operating stability, availability, maintenance requirements, delivery reliability and the supplier's ability to guarantee performance across both pumping and generating modes.

Value Chain Analysis

The highest-value activities are concentrated in hydraulic development, model testing, runner design, system integration, precision manufacturing and performance guarantees. These capabilities determine efficiency, stable operating range, cavitation performance and the ability to meet site-specific head and flow conditions. Large machining facilities and proven reference projects also create substantial entry barriers.

Manufacturing of standard structural components is comparatively more price-sensitive, while advanced runners, variable-speed hydraulic optimization and high-head solutions occupy the premium segment. Aftermarket services, including modernization engineering, replacement runners, efficiency upgrades, field diagnostics and long-term service, can provide more stable margins and less cyclical revenue than new-build equipment alone.

Segment Insights

By hydraulic design, reversible Francis pump-turbines remain the dominant category because they provide a practical balance of head range, unit output, efficiency and manufacturing maturity. Deriaz and axial-flow reversible designs serve narrower applications associated with wider head variation or relatively low-head, high-flow

conditions. By stage configuration, single-stage machines account for most installations, while multi-stage designs are reserved for exceptional high-head applications.

By rated output, the above-300-MW-to-500-MW segment represents the mainstream range for current large-scale projects. Fixed-speed units retain the largest installed and new-order base because of their mature design and lower system complexity, while variable-speed units command higher technical value where adjustable pumping power and enhanced grid services are required. By application, new large-scale pumped-storage plants remain the leading segment, followed by existing-unit modernization and major component replacement, conversion of conventional hydropower facilities, and distributed or small-scale pumped storage.

Downstream Market Opportunities

New Large-Scale Pumped-Storage Plants represent the largest downstream opportunity, particularly in regions building renewable-heavy power systems and new transmission networks. Projects with large unit ratings, high heads and multiple identical units support scale manufacturing, although competition and localization can place pressure on pricing.

Existing Unit Modernization and Major Component Replacement offer a growing recurring market in mature hydropower regions. Conversion of Conventional Hydropower Plants can create equipment demand while making use of existing reservoirs and grid connections. Distributed and Small-Scale Pumped Storage remains smaller but provides opportunities in industrial parks, isolated grids, mining areas and locations where conventional gigawatt-scale development is unsuitable.

Regional Insights

Asia-Pacific is the leading demand region and the principal source of new manufacturing orders. China has the world's largest pumped-storage construction pipeline, while Japan and South Korea maintain demand for technically advanced projects and fleet modernization. India and Australia are developing additional large projects to support solar and wind integration. China's installed capacity reached 62.365 GW by August 2025, and the country is targeting approximately 120 GW by 2030.

Europe combines new variable-speed projects with substantial modernization demand from an established operating fleet. North America has a large installed base and

significant long-term development potential, although permitting and project-development timelines constrain near-term conversion. Latin America, the Middle East and Africa remain more project-specific markets, with demand concentrated in countries that possess suitable topography, strong grid-growth requirements and access to long-term infrastructure financing.

Competitive Landscape Analysis

The competitive landscape is highly concentrated because only a limited number of manufacturing groups possess the combined hydraulic-development, model-testing, heavy-machining and global project-delivery capabilities required for large reversible pump-turbines. This study identifies 14 verified core manufacturing groups. European and Japanese suppliers retain strong positions in variable-speed technology, high-head engineering and modernization, while Chinese suppliers benefit from a large domestic project pipeline, expanding manufacturing capacity and increasing localization of high-capacity equipment.

Regional competition is becoming more differentiated. Large international groups compete for technically demanding and cross-border projects, while domestic suppliers in China, India and South Korea increasingly participate in local procurement and manufacturing. Competitive advantage depends less on catalogue breadth than on proven reference projects, guaranteed hydraulic performance, manufacturing quality, delivery execution, local service capability and the ability to coordinate the hydraulic machine with motor-generator and control-system requirements.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Reversible Pump-Turbine 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 Reversible Pump-Turbine portfolios and capabilities, market entry strategies, market positions, and

geographic footprints, to better understand these firms' unique position in an accelerating global Reversible Pump-Turbine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Reversible Pump-Turbine and breaks down the forecast by Hydraulic Design, 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 Reversible Pump-Turbine.

This report presents a comprehensive overview, market shares, and growth opportunities of Reversible Pump-Turbine market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Hydraulic Design:

Reversible Francis Pump-Turbine

Reversible Deriaz Pump-Turbine

Reversible Axial-Flow Pump-Turbine

Others

Segmentation by Shaft Orientation:

Vertical-Shaft Pump-Turbine

Horizontal-Shaft Pump-Turbine

Others

Segmentation by Speed Arrangement:

Fixed-Speed Pump-Turbine

Variable-Speed Pump-Turbine

Segmentation by Rated Unit Output:

Up to 100 MW

Above 100 MW to 300 MW

Above 300 MW to 500 MW

Above 500 MW

Segmentation by Application:

New Large-Scale Pumped-Storage Plants

Distributed and Small-Scale Pumped Storage

Conversion of Conventional Hydropower Plants

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.

Voith GmbH & Co. KGaA

ANDRITZ AG

GE Vernova Inc.

Harbin Electric Corporation

Dongfang Electric Corporation

Toshiba Corporation

Hitachi Mitsubishi Hydro Corporation

Zhefu Holding Group Co., Ltd.

Wikov Industry a.s.

Power Machines PJSC

Bharat Heavy Electricals Limited

IMPSA S.A.

Doosan Enerbility Co., Ltd.

Aker Solutions ASA

Key Questions Addressed in this Report

What is the 10-year outlook for the global Reversible Pump-Turbine market?

What factors are driving Reversible Pump-Turbine market growth, globally and

by region?

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

How do Reversible Pump-Turbine market opportunities vary by end market size?

How does Reversible Pump-Turbine break out by Hydraulic Design, 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 Reversible Pump-Turbine Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Reversible Pump-Turbine by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Reversible Pump-Turbine by Country/Region, 2021, 2025 & 2032
- 2.2 Reversible Pump-Turbine Segment by Hydraulic Design
 - 2.2.1 Reversible Francis Pump-Turbine
 - 2.2.2 Reversible Deriaz Pump-Turbine
 - 2.2.3 Reversible Axial-Flow Pump-Turbine
 - 2.2.4 Others
 - 2.2.5 Reversible Pump-Turbine Sales by Hydraulic Design
 - 2.2.5.1 Global Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)
 - 2.2.5.2 Global Reversible Pump-Turbine Revenue and Market Share by Hydraulic Design (2021-2026)
 - 2.2.5.3 Global Reversible Pump-Turbine Sale Price by Hydraulic Design (2021-2026)
- 2.3 Reversible Pump-Turbine Segment by Shaft Orientation
 - 2.3.1 Vertical-Shaft Pump-Turbine
 - 2.3.2 Horizontal-Shaft Pump-Turbine
 - 2.3.3 Others
 - 2.3.4 Reversible Pump-Turbine Sales by Shaft Orientation
 - 2.3.4.1 Global Reversible Pump-Turbine Sales Market Share by Shaft Orientation (2021-2026)

2.3.4.2 Global Reversible Pump-Turbine Revenue and Market Share by Shaft Orientation (2021-2026)

2.3.4.3 Global Reversible Pump-Turbine Sale Price by Shaft Orientation (2021-2026)

2.4 Reversible Pump-Turbine Segment by Speed Arrangement

2.4.1 Fixed-Speed Pump-Turbine

2.4.2 Variable-Speed Pump-Turbine

2.4.3 Reversible Pump-Turbine Sales by Speed Arrangement

2.4.3.1 Global Reversible Pump-Turbine Sales Market Share by Speed Arrangement (2021-2026)

2.4.3.2 Global Reversible Pump-Turbine Revenue and Market Share by Speed Arrangement (2021-2026)

2.4.3.3 Global Reversible Pump-Turbine Sale Price by Speed Arrangement (2021-2026)

2.5 Reversible Pump-Turbine Segment by Rated Unit Output

2.5.1 Up to 100 MW

2.5.2 Above 100 MW to 300 MW

2.5.3 Above 300 MW to 500 MW

2.5.4 Above 500 MW

2.5.5 Reversible Pump-Turbine Sales by Rated Unit Output

2.5.5.1 Global Reversible Pump-Turbine Sales Market Share by Rated Unit Output (2021-2026)

2.5.5.2 Global Reversible Pump-Turbine Revenue and Market Share by Rated Unit Output (2021-2026)

2.5.5.3 Global Reversible Pump-Turbine Sale Price by Rated Unit Output (2021-2026)

2.6 Reversible Pump-Turbine Segment by Application

2.6.1 New Large-Scale Pumped-Storage Plants

2.6.2 Distributed and Small-Scale Pumped Storage

2.6.3 Conversion of Conventional Hydropower Plants

2.6.4 Others

2.6.5 Reversible Pump-Turbine Sales by Application

2.6.5.1 Global Reversible Pump-Turbine Sale Market Share by Application (2021-2026)

2.6.5.2 Global Reversible Pump-Turbine Revenue and Market Share by Application (2021-2026)

2.6.5.3 Global Reversible Pump-Turbine Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Reversible Pump-Turbine Breakdown Data by Company
 - 3.1.1 Global Reversible Pump-Turbine Annual Sales by Company (2021-2026)
 - 3.1.2 Global Reversible Pump-Turbine Sales Market Share by Company (2021-2026)
- 3.2 Global Reversible Pump-Turbine Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Reversible Pump-Turbine Revenue by Company (2021-2026)
 - 3.2.2 Global Reversible Pump-Turbine Revenue Market Share by Company (2021-2026)
- 3.3 Global Reversible Pump-Turbine Sale Price by Company
- 3.4 Key Manufacturers Reversible Pump-Turbine Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Reversible Pump-Turbine Product Location Distribution
 - 3.4.2 Players Reversible Pump-Turbine 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 REVERSIBLE PUMP-TURBINE BY GEOGRAPHIC REGION

- 4.1 World Historic Reversible Pump-Turbine Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Reversible Pump-Turbine Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Reversible Pump-Turbine Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Reversible Pump-Turbine Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Reversible Pump-Turbine Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Reversible Pump-Turbine Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Reversible Pump-Turbine Sales Growth
- 4.4 APAC Reversible Pump-Turbine Sales Growth
- 4.5 Europe Reversible Pump-Turbine Sales Growth
- 4.6 Middle East & Africa Reversible Pump-Turbine Sales Growth

5 AMERICAS

5.1 Americas Reversible Pump-Turbine Sales by Country

5.1.1 Americas Reversible Pump-Turbine Sales by Country (2021-2026)

5.1.2 Americas Reversible Pump-Turbine Revenue by Country (2021-2026)

5.2 Americas Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026)

5.3 Americas Reversible Pump-Turbine Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Reversible Pump-Turbine Sales by Region

6.1.1 APAC Reversible Pump-Turbine Sales by Region (2021-2026)

6.1.2 APAC Reversible Pump-Turbine Revenue by Region (2021-2026)

6.2 APAC Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026)

6.3 APAC Reversible Pump-Turbine 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 Reversible Pump-Turbine by Country

7.1.1 Europe Reversible Pump-Turbine Sales by Country (2021-2026)

7.1.2 Europe Reversible Pump-Turbine Revenue by Country (2021-2026)

7.2 Europe Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026)

7.3 Europe Reversible Pump-Turbine 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 Reversible Pump-Turbine by Country

8.1.1 Middle East & Africa Reversible Pump-Turbine Sales by Country (2021-2026)

8.1.2 Middle East & Africa Reversible Pump-Turbine Revenue by Country (2021-2026)

8.2 Middle East & Africa Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026)

8.3 Middle East & Africa Reversible Pump-Turbine 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 Reversible Pump-Turbine

10.3 Manufacturing Process Analysis of Reversible Pump-Turbine

10.4 Industry Chain Structure of Reversible Pump-Turbine

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Reversible Pump-Turbine Distributors

11.3 Reversible Pump-Turbine Customer

12 WORLD FORECAST REVIEW FOR REVERSIBLE PUMP-TURBINE BY GEOGRAPHIC REGION

12.1 Global Reversible Pump-Turbine Market Size Forecast by Region

12.1.1 Global Reversible Pump-Turbine Forecast by Region (2027-2032)

- 12.1.2 Global Reversible Pump-Turbine 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 Reversible Pump-Turbine Forecast by Hydraulic Design (2027-2032)
- 12.7 Global Reversible Pump-Turbine Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Voith GmbH & Co. KGaA

- 13.1.1 Voith GmbH & Co. KGaA Company Information
- 13.1.2 Voith GmbH & Co. KGaA Reversible Pump-Turbine Product Portfolios and Specifications
- 13.1.3 Voith GmbH & Co. KGaA Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Voith GmbH & Co. KGaA Main Business Overview
- 13.1.5 Voith GmbH & Co. KGaA Latest Developments

13.2 ANDRITZ AG

- 13.2.1 ANDRITZ AG Company Information
- 13.2.2 ANDRITZ AG Reversible Pump-Turbine Product Portfolios and Specifications
- 13.2.3 ANDRITZ AG Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 ANDRITZ AG Main Business Overview
- 13.2.5 ANDRITZ AG Latest Developments

13.3 GE Vernova Inc.

- 13.3.1 GE Vernova Inc. Company Information
- 13.3.2 GE Vernova Inc. Reversible Pump-Turbine Product Portfolios and Specifications
- 13.3.3 GE Vernova Inc. Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 GE Vernova Inc. Main Business Overview
- 13.3.5 GE Vernova Inc. Latest Developments

13.4 Harbin Electric Corporation

- 13.4.1 Harbin Electric Corporation Company Information
- 13.4.2 Harbin Electric Corporation Reversible Pump-Turbine Product Portfolios and Specifications
- 13.4.3 Harbin Electric Corporation Reversible Pump-Turbine Sales, Revenue, Price

and Gross Margin (2021-2026)

13.4.4 Harbin Electric Corporation Main Business Overview

13.4.5 Harbin Electric Corporation Latest Developments

13.5 Dongfang Electric Corporation

13.5.1 Dongfang Electric Corporation Company Information

13.5.2 Dongfang Electric Corporation Reversible Pump-Turbine Product Portfolios and Specifications

13.5.3 Dongfang Electric Corporation Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Dongfang Electric Corporation Main Business Overview

13.5.5 Dongfang Electric Corporation Latest Developments

13.6 Toshiba Corporation

13.6.1 Toshiba Corporation Company Information

13.6.2 Toshiba Corporation Reversible Pump-Turbine Product Portfolios and Specifications

13.6.3 Toshiba Corporation Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Toshiba Corporation Main Business Overview

13.6.5 Toshiba Corporation Latest Developments

13.7 Hitachi Mitsubishi Hydro Corporation

13.7.1 Hitachi Mitsubishi Hydro Corporation Company Information

13.7.2 Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Product Portfolios and Specifications

13.7.3 Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Hitachi Mitsubishi Hydro Corporation Main Business Overview

13.7.5 Hitachi Mitsubishi Hydro Corporation Latest Developments

13.8 Zhefu Holding Group Co., Ltd.

13.8.1 Zhefu Holding Group Co., Ltd. Company Information

13.8.2 Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Product Portfolios and Specifications

13.8.3 Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Zhefu Holding Group Co., Ltd. Main Business Overview

13.8.5 Zhefu Holding Group Co., Ltd. Latest Developments

13.9 Wikov Industry a.s.

13.9.1 Wikov Industry a.s. Company Information

13.9.2 Wikov Industry a.s. Reversible Pump-Turbine Product Portfolios and Specifications

13.9.3 Wikov Industry a.s. Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Wikov Industry a.s. Main Business Overview

13.9.5 Wikov Industry a.s. Latest Developments

13.10 Power Machines PJSC

13.10.1 Power Machines PJSC Company Information

13.10.2 Power Machines PJSC Reversible Pump-Turbine Product Portfolios and Specifications

13.10.3 Power Machines PJSC Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Power Machines PJSC Main Business Overview

13.10.5 Power Machines PJSC Latest Developments

13.11 Bharat Heavy Electricals Limited

13.11.1 Bharat Heavy Electricals Limited Company Information

13.11.2 Bharat Heavy Electricals Limited Reversible Pump-Turbine Product Portfolios and Specifications

13.11.3 Bharat Heavy Electricals Limited Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Bharat Heavy Electricals Limited Main Business Overview

13.11.5 Bharat Heavy Electricals Limited Latest Developments

13.12 IMPSA S.A.

13.12.1 IMPSA S.A. Company Information

13.12.2 IMPSA S.A. Reversible Pump-Turbine Product Portfolios and Specifications

13.12.3 IMPSA S.A. Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 IMPSA S.A. Main Business Overview

13.12.5 IMPSA S.A. Latest Developments

13.13 Doosan Enerbility Co., Ltd.

13.13.1 Doosan Enerbility Co., Ltd. Company Information

13.13.2 Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Product Portfolios and Specifications

13.13.3 Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Doosan Enerbility Co., Ltd. Main Business Overview

13.13.5 Doosan Enerbility Co., Ltd. Latest Developments

13.14 Aker Solutions ASA

13.14.1 Aker Solutions ASA Company Information

13.14.2 Aker Solutions ASA Reversible Pump-Turbine Product Portfolios and Specifications

13.14.3 Aker Solutions ASA Reversible Pump-Turbine Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Aker Solutions ASA Main Business Overview

13.14.5 Aker Solutions ASA Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Reversible Pump-Turbine Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Reversible Pump-Turbine Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Reversible Francis Pump-Turbine

Table 4. Major Players of Reversible Deriaz Pump-Turbine

Table 5. Major Players of Reversible Axial-Flow Pump-Turbine

Table 6. Major Players of Others

Table 7. Global Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026) & (Units)

Table 8. Global Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)

Table 9. Global Reversible Pump-Turbine Revenue by Hydraulic Design (2021-2026) & (\$ million)

Table 10. Global Reversible Pump-Turbine Revenue Market Share by Hydraulic Design (2021-2026)

Table 11. Global Reversible Pump-Turbine Sale Price by Hydraulic Design (2021-2026) & (K US\$/Unit)

Table 12. Major Players of Vertical-Shaft Pump-Turbine

Table 13. Major Players of Horizontal-Shaft Pump-Turbine

Table 14. Major Players of Others

Table 15. Global Reversible Pump-Turbine Sales by Shaft Orientation (2021-2026) & (Units)

Table 16. Global Reversible Pump-Turbine Sales Market Share by Shaft Orientation (2021-2026)

Table 17. Global Reversible Pump-Turbine Revenue by Shaft Orientation (2021-2026) & (\$ million)

Table 18. Global Reversible Pump-Turbine Revenue Market Share by Shaft Orientation (2021-2026)

Table 19. Global Reversible Pump-Turbine Sale Price by Shaft Orientation (2021-2026) & (K US\$/Unit)

Table 20. Major Players of Fixed-Speed Pump-Turbine

Table 21. Major Players of Variable-Speed Pump-Turbine

Table 22. Global Reversible Pump-Turbine Sales by Speed Arrangement (2021-2026) & (Units)

Table 23. Global Reversible Pump-Turbine Sales Market Share by Speed Arrangement (2021-2026)

Table 24. Global Reversible Pump-Turbine Revenue by Speed Arrangement (2021-2026) & (\$ million)

Table 25. Global Reversible Pump-Turbine Revenue Market Share by Speed Arrangement (2021-2026)

Table 26. Global Reversible Pump-Turbine Sale Price by Speed Arrangement (2021-2026) & (K US\$/Unit)

Table 27. Major Players of Up to 100 MW

Table 28. Major Players of Above 100 MW to 300 MW

Table 29. Major Players of Above 300 MW to 500 MW

Table 30. Major Players of Above 500 MW

Table 31. Global Reversible Pump-Turbine Sales by Rated Unit Output (2021-2026) & (Units)

Table 32. Global Reversible Pump-Turbine Sales Market Share by Rated Unit Output (2021-2026)

Table 33. Global Reversible Pump-Turbine Revenue by Rated Unit Output (2021-2026) & (\$ million)

Table 34. Global Reversible Pump-Turbine Revenue Market Share by Rated Unit Output (2021-2026)

Table 35. Global Reversible Pump-Turbine Sale Price by Rated Unit Output (2021-2026) & (K US\$/Unit)

Table 36. Global Reversible Pump-Turbine Sale by Application (2021-2026) & (Units)

Table 37. Global Reversible Pump-Turbine Sale Market Share by Application (2021-2026)

Table 38. Global Reversible Pump-Turbine Revenue by Application (2021-2026) & (\$ million)

Table 39. Global Reversible Pump-Turbine Revenue Market Share by Application (2021-2026)

Table 40. Global Reversible Pump-Turbine Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 41. Global Reversible Pump-Turbine Sales by Company (2021-2026) & (Units)

Table 42. Global Reversible Pump-Turbine Sales Market Share by Company (2021-2026)

Table 43. Global Reversible Pump-Turbine Revenue by Company (2021-2026) & (\$ millions)

Table 44. Global Reversible Pump-Turbine Revenue Market Share by Company (2021-2026)

Table 45. Global Reversible Pump-Turbine Sale Price by Company (2021-2026) & (K

US\$/Unit)

Table 46. Key Manufacturers Reversible Pump-Turbine Producing Area Distribution and Sales Area

Table 47. Players Reversible Pump-Turbine Products Offered

Table 48. Reversible Pump-Turbine Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 49. New Products and Potential Entrants

Table 50. Market M&A Activity & Strategy

Table 51. Global Reversible Pump-Turbine Sales by Geographic Region (2021-2026) & (Units)

Table 52. Global Reversible Pump-Turbine Sales Market Share Geographic Region (2021-2026)

Table 53. Global Reversible Pump-Turbine Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 54. Global Reversible Pump-Turbine Revenue Market Share by Geographic Region (2021-2026)

Table 55. Global Reversible Pump-Turbine Sales by Country/Region (2021-2026) & (Units)

Table 56. Global Reversible Pump-Turbine Sales Market Share by Country/Region (2021-2026)

Table 57. Global Reversible Pump-Turbine Revenue by Country/Region (2021-2026) & (\$ millions)

Table 58. Global Reversible Pump-Turbine Revenue Market Share by Country/Region (2021-2026)

Table 59. Americas Reversible Pump-Turbine Sales by Country (2021-2026) & (Units)

Table 60. Americas Reversible Pump-Turbine Sales Market Share by Country (2021-2026)

Table 61. Americas Reversible Pump-Turbine Revenue by Country (2021-2026) & (\$ millions)

Table 62. Americas Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026) & (Units)

Table 63. Americas Reversible Pump-Turbine Sales by Application (2021-2026) & (Units)

Table 64. APAC Reversible Pump-Turbine Sales by Region (2021-2026) & (Units)

Table 65. APAC Reversible Pump-Turbine Sales Market Share by Region (2021-2026)

Table 66. APAC Reversible Pump-Turbine Revenue by Region (2021-2026) & (\$ millions)

Table 67. APAC Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026) & (Units)

Table 68. APAC Reversible Pump-Turbine Sales by Application (2021-2026) & (Units)

Table 69. Europe Reversible Pump-Turbine Sales by Country (2021-2026) & (Units)

Table 70. Europe Reversible Pump-Turbine Revenue by Country (2021-2026) & (\$ millions)

Table 71. Europe Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026) & (Units)

Table 72. Europe Reversible Pump-Turbine Sales by Application (2021-2026) & (Units)

Table 73. Middle East & Africa Reversible Pump-Turbine Sales by Country (2021-2026) & (Units)

Table 74. Middle East & Africa Reversible Pump-Turbine Revenue Market Share by Country (2021-2026)

Table 75. Middle East & Africa Reversible Pump-Turbine Sales by Hydraulic Design (2021-2026) & (Units)

Table 76. Middle East & Africa Reversible Pump-Turbine Sales by Application (2021-2026) & (Units)

Table 77. Key Market Drivers & Growth Opportunities of Reversible Pump-Turbine

Table 78. Key Market Challenges & Risks of Reversible Pump-Turbine

Table 79. Key Industry Trends of Reversible Pump-Turbine

Table 80. Reversible Pump-Turbine Raw Material

Table 81. Key Suppliers of Raw Materials

Table 82. Reversible Pump-Turbine Distributors List

Table 83. Reversible Pump-Turbine Customer List

Table 84. Global Reversible Pump-Turbine Sales Forecast by Region (2027-2032) & (Units)

Table 85. Global Reversible Pump-Turbine Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 86. Americas Reversible Pump-Turbine Sales Forecast by Country (2027-2032) & (Units)

Table 87. Americas Reversible Pump-Turbine Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 88. APAC Reversible Pump-Turbine Sales Forecast by Region (2027-2032) & (Units)

Table 89. APAC Reversible Pump-Turbine Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 90. Europe Reversible Pump-Turbine Sales Forecast by Country (2027-2032) & (Units)

Table 91. Europe Reversible Pump-Turbine Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 92. Middle East & Africa Reversible Pump-Turbine Sales Forecast by Country

(2027-2032) & (Units)

Table 93. Middle East & Africa Reversible Pump-Turbine Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 94. Global Reversible Pump-Turbine Sales Forecast by Hydraulic Design (2027-2032) & (Units)

Table 95. Global Reversible Pump-Turbine Revenue Forecast by Hydraulic Design (2027-2032) & (\$ millions)

Table 96. Global Reversible Pump-Turbine Sales Forecast by Application (2027-2032) & (Units)

Table 97. Global Reversible Pump-Turbine Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 98. Voith GmbH & Co. KGaA Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 99. Voith GmbH & Co. KGaA Reversible Pump-Turbine Product Portfolios and Specifications

Table 100. Voith GmbH & Co. KGaA Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 101. Voith GmbH & Co. KGaA Main Business

Table 102. Voith GmbH & Co. KGaA Latest Developments

Table 103. ANDRITZ AG Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 104. ANDRITZ AG Reversible Pump-Turbine Product Portfolios and Specifications

Table 105. ANDRITZ AG Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 106. ANDRITZ AG Main Business

Table 107. ANDRITZ AG Latest Developments

Table 108. GE Vernova Inc. Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 109. GE Vernova Inc. Reversible Pump-Turbine Product Portfolios and Specifications

Table 110. GE Vernova Inc. Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 111. GE Vernova Inc. Main Business

Table 112. GE Vernova Inc. Latest Developments

Table 113. Harbin Electric Corporation Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 114. Harbin Electric Corporation Reversible Pump-Turbine Product Portfolios and Specifications

Table 115. Harbin Electric Corporation Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 116. Harbin Electric Corporation Main Business

Table 117. Harbin Electric Corporation Latest Developments

Table 118. Dongfang Electric Corporation Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 119. Dongfang Electric Corporation Reversible Pump-Turbine Product Portfolios and Specifications

Table 120. Dongfang Electric Corporation Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 121. Dongfang Electric Corporation Main Business

Table 122. Dongfang Electric Corporation Latest Developments

Table 123. Toshiba Corporation Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 124. Toshiba Corporation Reversible Pump-Turbine Product Portfolios and Specifications

Table 125. Toshiba Corporation Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 126. Toshiba Corporation Main Business

Table 127. Toshiba Corporation Latest Developments

Table 128. Hitachi Mitsubishi Hydro Corporation Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 129. Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Product Portfolios and Specifications

Table 130. Hitachi Mitsubishi Hydro Corporation Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 131. Hitachi Mitsubishi Hydro Corporation Main Business

Table 132. Hitachi Mitsubishi Hydro Corporation Latest Developments

Table 133. Zhefu Holding Group Co., Ltd. Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 134. Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Product Portfolios and Specifications

Table 135. Zhefu Holding Group Co., Ltd. Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 136. Zhefu Holding Group Co., Ltd. Main Business

Table 137. Zhefu Holding Group Co., Ltd. Latest Developments

Table 138. Wikov Industry a.s. Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 139. Wikov Industry a.s. Reversible Pump-Turbine Product Portfolios and

Specifications

Table 140. Wikov Industry a.s. Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 141. Wikov Industry a.s. Main Business

Table 142. Wikov Industry a.s. Latest Developments

Table 143. Power Machines PJSC Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 144. Power Machines PJSC Reversible Pump-Turbine Product Portfolios and Specifications

Table 145. Power Machines PJSC Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 146. Power Machines PJSC Main Business

Table 147. Power Machines PJSC Latest Developments

Table 148. Bharat Heavy Electricals Limited Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 149. Bharat Heavy Electricals Limited Reversible Pump-Turbine Product Portfolios and Specifications

Table 150. Bharat Heavy Electricals Limited Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 151. Bharat Heavy Electricals Limited Main Business

Table 152. Bharat Heavy Electricals Limited Latest Developments

Table 153. IMPSA S.A. Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 154. IMPSA S.A. Reversible Pump-Turbine Product Portfolios and Specifications

Table 155. IMPSA S.A. Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 156. IMPSA S.A. Main Business

Table 157. IMPSA S.A. Latest Developments

Table 158. Doosan Enerbility Co., Ltd. Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 159. Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Product Portfolios and Specifications

Table 160. Doosan Enerbility Co., Ltd. Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 161. Doosan Enerbility Co., Ltd. Main Business

Table 162. Doosan Enerbility Co., Ltd. Latest Developments

Table 163. Aker Solutions ASA Basic Information, Reversible Pump-Turbine Manufacturing Base, Sales Area and Its Competitors

Table 164. Aker Solutions ASA Reversible Pump-Turbine Product Portfolios and

Specifications

Table 165. Aker Solutions ASA Reversible Pump-Turbine Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 166. Aker Solutions ASA Main Business

Table 167. Aker Solutions ASA Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Reversible Pump-Turbine
- Figure 2. Reversible Pump-Turbine Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Reversible Pump-Turbine Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Reversible Pump-Turbine Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Reversible Pump-Turbine Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Reversible Pump-Turbine Sales Market Share by Country/Region (2025)
- Figure 10. Reversible Pump-Turbine Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Reversible Francis Pump-Turbine
- Figure 12. Product Picture of Reversible Deriaz Pump-Turbine
- Figure 13. Product Picture of Reversible Axial-Flow Pump-Turbine
- Figure 14. Product Picture of Others
- Figure 15. Global Reversible Pump-Turbine Sales Market Share by Hydraulic Design in 2026
- Figure 16. Global Reversible Pump-Turbine Revenue Market Share by Hydraulic Design (2021-2026)
- Figure 17. Product Picture of Vertical-Shaft Pump-Turbine
- Figure 18. Product Picture of Horizontal-Shaft Pump-Turbine
- Figure 19. Product Picture of Others
- Figure 20. Global Reversible Pump-Turbine Sales Market Share by Shaft Orientation in 2026
- Figure 21. Global Reversible Pump-Turbine Revenue Market Share by Shaft Orientation (2021-2026)
- Figure 22. Product Picture of Fixed-Speed Pump-Turbine
- Figure 23. Product Picture of Variable-Speed Pump-Turbine
- Figure 24. Global Reversible Pump-Turbine Sales Market Share by Speed Arrangement in 2026
- Figure 25. Global Reversible Pump-Turbine Revenue Market Share by Speed Arrangement (2021-2026)
- Figure 26. Product Picture of Up to 100 MW

Figure 27. Product Picture of Above 100 MW to 300 MW

Figure 28. Product Picture of Above 300 MW to 500 MW

Figure 29. Product Picture of Above 500 MW

Figure 30. Global Reversible Pump-Turbine Sales Market Share by Rated Unit Output in 2026

Figure 31. Global Reversible Pump-Turbine Revenue Market Share by Rated Unit Output (2021-2026)

Figure 32. Reversible Pump-Turbine Consumed in New Large-Scale Pumped-Storage Plants

Figure 33. Global Reversible Pump-Turbine Market: New Large-Scale Pumped-Storage Plants (2021-2026) & (Units)

Figure 34. Reversible Pump-Turbine Consumed in Distributed and Small-Scale Pumped Storage

Figure 35. Global Reversible Pump-Turbine Market: Distributed and Small-Scale Pumped Storage (2021-2026) & (Units)

Figure 36. Reversible Pump-Turbine Consumed in Conversion of Conventional Hydropower Plants

Figure 37. Global Reversible Pump-Turbine Market: Conversion of Conventional Hydropower Plants (2021-2026) & (Units)

Figure 38. Reversible Pump-Turbine Consumed in Others

Figure 39. Global Reversible Pump-Turbine Market: Others (2021-2026) & (Units)

Figure 40. Global Reversible Pump-Turbine Sale Market Share by Application (2025)

Figure 41. Global Reversible Pump-Turbine Revenue Market Share by Application in 2025

Figure 42. Reversible Pump-Turbine Sales by Company in 2025 (Units)

Figure 43. Global Reversible Pump-Turbine Sales Market Share by Company in 2025

Figure 44. Reversible Pump-Turbine Revenue by Company in 2025 (\$ millions)

Figure 45. Global Reversible Pump-Turbine Revenue Market Share by Company in 2025

Figure 46. Global Reversible Pump-Turbine Sales Market Share by Geographic Region (2021-2026)

Figure 47. Global Reversible Pump-Turbine Revenue Market Share by Geographic Region in 2025

Figure 48. Americas Reversible Pump-Turbine Sales 2021-2026 (Units)

Figure 49. Americas Reversible Pump-Turbine Revenue 2021-2026 (\$ millions)

Figure 50. APAC Reversible Pump-Turbine Sales 2021-2026 (Units)

Figure 51. APAC Reversible Pump-Turbine Revenue 2021-2026 (\$ millions)

Figure 52. Europe Reversible Pump-Turbine Sales 2021-2026 (Units)

Figure 53. Europe Reversible Pump-Turbine Revenue 2021-2026 (\$ millions)

Figure 54. Middle East & Africa Reversible Pump-Turbine Sales 2021-2026 (Units)

Figure 55. Middle East & Africa Reversible Pump-Turbine Revenue 2021-2026 (\$ millions)

Figure 56. Americas Reversible Pump-Turbine Sales Market Share by Country in 2025

Figure 57. Americas Reversible Pump-Turbine Revenue Market Share by Country (2021-2026)

Figure 58. Americas Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)

Figure 59. Americas Reversible Pump-Turbine Sales Market Share by Application (2021-2026)

Figure 60. United States Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 61. Canada Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 62. Mexico Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 63. Brazil Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 64. APAC Reversible Pump-Turbine Sales Market Share by Region in 2025

Figure 65. APAC Reversible Pump-Turbine Revenue Market Share by Region (2021-2026)

Figure 66. APAC Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)

Figure 67. APAC Reversible Pump-Turbine Sales Market Share by Application (2021-2026)

Figure 68. China Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 69. Japan Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 70. South Korea Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 71. Southeast Asia Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 72. India Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 73. Australia Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 74. China Taiwan Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)

Figure 75. Europe Reversible Pump-Turbine Sales Market Share by Country in 2025

Figure 76. Europe Reversible Pump-Turbine Revenue Market Share by Country (2021-2026)

Figure 77. Europe Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)

Figure 78. Europe Reversible Pump-Turbine Sales Market Share by Application (2021-2026)

- Figure 79. Germany Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 80. France Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 81. UK Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 82. Italy Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 83. Russia Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 84. Middle East & Africa Reversible Pump-Turbine Sales Market Share by Country (2021-2026)
- Figure 85. Middle East & Africa Reversible Pump-Turbine Sales Market Share by Hydraulic Design (2021-2026)
- Figure 86. Middle East & Africa Reversible Pump-Turbine Sales Market Share by Application (2021-2026)
- Figure 87. Egypt Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 88. South Africa Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 89. Israel Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 90. Turkey Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 91. GCC Countries Reversible Pump-Turbine Revenue Growth 2021-2026 (\$ millions)
- Figure 92. Manufacturing Cost Structure Analysis of Reversible Pump-Turbine in 2026
- Figure 93. Manufacturing Process Analysis of Reversible Pump-Turbine
- Figure 94. Industry Chain Structure of Reversible Pump-Turbine
- Figure 95. Channels of Distribution
- Figure 96. Global Reversible Pump-Turbine Sales Market Forecast by Region (2027-2032)
- Figure 97. Global Reversible Pump-Turbine Revenue Market Share Forecast by Region (2027-2032)
- Figure 98. Global Reversible Pump-Turbine Sales Market Share Forecast by Hydraulic Design (2027-2032)
- Figure 99. Global Reversible Pump-Turbine Revenue Market Share Forecast by Hydraulic Design (2027-2032)
- Figure 100. Global Reversible Pump-Turbine Sales Market Share Forecast by Application (2027-2032)
- Figure 101. Global Reversible Pump-Turbine Revenue Market Share Forecast by Application (2027-2032)

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