

Global Turbine Cooler Market Growth 2026-2032

<https://marketpublishers.com/r/G0E6257FC8BCEN.html>

Date: July 2026

Pages: 88

Price: US\$ 3,660.00 (Single User License)

ID: G0E6257FC8BCEN

Abstracts

The global Turbine Cooler market size is predicted to grow from US\$ 1037 million in 2025 to US\$ 1555 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 2032.

An air-cycle turbine cooler, commonly referred to as an Air Cycle Machine, is a high-speed turbomachinery module that uses air as the working medium and an expansion turbine as the principal cooling element. In a typical configuration, compressed air is pre-cooled through heat exchangers and then expanded through a turbine to produce a low-temperature air stream for cabin conditioning, avionics cooling, mission-pod thermal control, unmanned aircraft environmental control, or industrial low-temperature refrigeration. The module may integrate a turbine, compressor, fan, bearings, seals, housings, sensors and control interfaces, depending on whether it is designed as a two-wheel, three-wheel or more advanced air-cycle architecture.

This research focuses on the turbine-cooling module and directly integrated air-cycle refrigeration hardware rather than the broader thermal-management ecosystem. Indicative transaction values vary materially by certification level, platform and integration scope; aerospace-grade ACM units are commonly assessed in the range of approximately USD 0.12?0.45 million per unit, while military or special-mission units can be higher, and industrial air-cycle refrigeration modules or systems may range broadly from roughly USD 0.15?1.20 million depending on capacity and temperature requirements.

Based on our research, the air-cycle turbine cooler market should be treated as a specialised turbomachinery and environmental-control segment rather than as a broad refrigeration or heat-exchanger market. The core product is the air-cycle machine or turbine-cooling module that generates cold air through expansion rather than through a conventional refrigerant cycle. This distinction is critical for market sizing because

aircraft environmental-control systems, general heat exchangers, liquid cooling modules and vapour-cycle air-conditioning systems are much broader categories and would materially overstate the addressable market. Under a narrow definition, the global supplier base is relatively small, with only a limited number of companies possessing the certification base, installed fleet exposure, rotating-machinery know-how and platform relationships required to supply aerospace-grade ACMs. The broader longlist is nevertheless wider than the core formal list because several companies participate in adjacent thermal-management, industrial air-cycle refrigeration, or regional aerospace supply-chain positions without sufficient evidence to be treated as leading ACM OEMs.

From a supply-side perspective, the market is structurally concentrated around North American and European aerospace system suppliers, complemented by specialised European and Japanese companies in air-cycle refrigeration and by a smaller number of emerging or regional suppliers. The most defensible formal list is led by companies with official evidence of aircraft air-management systems, air-cycle refrigeration modules, cooling turbines or ACM-related products. European suppliers have a comparatively diversified position because they cover not only aerospace but also rail HVAC and industrial low-GWP refrigeration applications. Japan's role is more visible in industrial air-cycle low-temperature refrigeration, while China shows meaningful technical and industrial clues in aviation environmental-control systems but has less transparent public product evidence. For this reason, selected Chinese entities are retained in the longlist and high-priority watchlist instead of being excluded merely because financial or product disclosures are incomplete.

Demand is anchored by aircraft production, the installed fleet aftermarket, defence and special-mission platforms, and selected industrial low-temperature applications. New aircraft deliveries support OEM linefit demand, but the aftermarket is structurally important because ACMs operate within certified aircraft platforms that require long-cycle maintenance, replacement and overhaul support. In parallel, higher-power avionics, electronic-warfare pods, unmanned aircraft and missionised platforms create additional cooling challenges that can favour compact air-cycle solutions in specific applications. The industrial growth case is different: it is driven by the need for natural refrigerants, ultra-low-temperature capability, regulatory pressure on high-GWP refrigerants and safety-sensitive cold-chain or process-cooling use cases. As a result, the sector's long-term growth profile is moderate in mature aerospace platforms but more dynamic in industrial and low-GWP niches.

Technologically, the sector is evolving toward higher reliability, more efficient turbomachinery, improved bearing systems, lower maintenance burden, digital health

monitoring and better integration with more-electric aircraft architectures. Air-cycle systems retain advantages in high-altitude applications, refrigerant-free operation and certain safety-critical environments, but they also face substitution pressure from advanced vapour-cycle systems, liquid cooling and hybrid thermal-management architectures. Future competition is therefore unlikely to be decided by a single cooling technology. Instead, the market will be shaped by platform-level trade-offs among reliability, weight, power consumption, certification cost, maintainability and environmental compliance. This favours established aerospace suppliers on major aircraft programmes while leaving room for specialised suppliers in UAVs, mission pods, industrial ultra-low-temperature systems and low-GWP transport HVAC.

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

This Insight Report provides a comprehensive analysis of the global Turbine Cooler 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 Turbine Cooler portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Turbine Cooler market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Turbine Cooler and breaks down the forecast by Product Architecture, 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 Turbine Cooler.

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

Segmentation by Product Architecture:

Simple Expansion Turbine Cooler

Two-wheel Air Cycle Machine

Three-wheel Air Cycle Machine

Four-wheel / Advanced ACM

Other

Segmentation by Drive Concept:

Pneumatic Shaft-driven ACM

Motorized / Electrically Assisted ACM

Air-bearing / Foil-bearing ACM

Other

Segmentation by Temperature Range:

Cabin and Equipment Cooling Range

Low-temperature Air-cycle Range

Ultra-low Temperature Range

Other

Segmentation by Sales Channel and Lifecycle:

OEM Linefit

Aftermarket Spares

Overhaul and Exchange Units

Retrofit and Upgrade Projects

Other

Segmentation by Application:

Commercial Aircraft

Military and Special Mission Aircraft

Rail and Public Transport HVAC

Industrial Low-temperature Refrigeration

Other

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.

RTX Corporation

Honeywell International Inc.

Liebherr-International AG

Safran S.A.

PBS GROUP

Anova

Mayekawa Mfg. Co., Ltd.

MIRAI INTEX s.r.o.

AVIC Airborne Systems

Parker Hannifin

Key Questions Addressed in this Report

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

What factors are driving Turbine Cooler market growth, globally and by region?

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

How do Turbine Cooler market opportunities vary by end market size?

How does Turbine Cooler break out by Product Architecture, 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 Turbine Cooler Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Turbine Cooler by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Turbine Cooler by Country/Region, 2021, 2025 & 2032
- 2.2 Turbine Cooler Segment by Product Architecture
 - 2.2.1 Simple Expansion Turbine Cooler
 - 2.2.2 Two-wheel Air Cycle Machine
 - 2.2.3 Three-wheel Air Cycle Machine
 - 2.2.4 Four-wheel / Advanced ACM
 - 2.2.5 Other
 - 2.2.6 Turbine Cooler Sales by Product Architecture
 - 2.2.6.1 Global Turbine Cooler Sales Market Share by Product Architecture (2021-2026)
 - 2.2.6.2 Global Turbine Cooler Revenue and Market Share by Product Architecture (2021-2026)
 - 2.2.6.3 Global Turbine Cooler Sale Price by Product Architecture (2021-2026)
- 2.3 Turbine Cooler Segment by Drive Concept
 - 2.3.1 Pneumatic Shaft-driven ACM
 - 2.3.2 Motorized / Electrically Assisted ACM
 - 2.3.3 Air-bearing / Foil-bearing ACM
 - 2.3.4 Other
 - 2.3.5 Turbine Cooler Sales by Drive Concept

- 2.3.5.1 Global Turbine Cooler Sales Market Share by Drive Concept (2021-2026)
- 2.3.5.2 Global Turbine Cooler Revenue and Market Share by Drive Concept (2021-2026)
- 2.3.5.3 Global Turbine Cooler Sale Price by Drive Concept (2021-2026)
- 2.4 Turbine Cooler Segment by Temperature Range
 - 2.4.1 Cabin and Equipment Cooling Range
 - 2.4.2 Low-temperature Air-cycle Range
 - 2.4.3 Ultra-low Temperature Range
 - 2.4.4 Other
 - 2.4.5 Turbine Cooler Sales by Temperature Range
 - 2.4.5.1 Global Turbine Cooler Sales Market Share by Temperature Range (2021-2026)
 - 2.4.5.2 Global Turbine Cooler Revenue and Market Share by Temperature Range (2021-2026)
 - 2.4.5.3 Global Turbine Cooler Sale Price by Temperature Range (2021-2026)
- 2.5 Turbine Cooler Segment by Sales Channel and Lifecycle
 - 2.5.1 OEM Linefit
 - 2.5.2 Aftermarket Spares
 - 2.5.3 Overhaul and Exchange Units
 - 2.5.4 Retrofit and Upgrade Projects
 - 2.5.5 Other
 - 2.5.6 Turbine Cooler Sales by Sales Channel and Lifecycle
 - 2.5.6.1 Global Turbine Cooler Sales Market Share by Sales Channel and Lifecycle (2021-2026)
 - 2.5.6.2 Global Turbine Cooler Revenue and Market Share by Sales Channel and Lifecycle (2021-2026)
 - 2.5.6.3 Global Turbine Cooler Sale Price by Sales Channel and Lifecycle (2021-2026)
- 2.6 Turbine Cooler Segment by Application
 - 2.6.1 Commercial Aircraft
 - 2.6.2 Military and Special Mission Aircraft
 - 2.6.3 Rail and Public Transport HVAC
 - 2.6.4 Industrial Low-temperature Refrigeration
 - 2.6.5 Other
 - 2.6.6 Turbine Cooler Sales by Application
 - 2.6.6.1 Global Turbine Cooler Sale Market Share by Application (2021-2026)
 - 2.6.6.2 Global Turbine Cooler Revenue and Market Share by Application (2021-2026)
 - 2.6.6.3 Global Turbine Cooler Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

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

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

5 AMERICAS

- 5.1 Americas Turbine Cooler Sales by Country
 - 5.1.1 Americas Turbine Cooler Sales by Country (2021-2026)
 - 5.1.2 Americas Turbine Cooler Revenue by Country (2021-2026)
- 5.2 Americas Turbine Cooler Sales by Product Architecture (2021-2026)
- 5.3 Americas Turbine Cooler Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Turbine Cooler Sales by Region

6.1.1 APAC Turbine Cooler Sales by Region (2021-2026)

6.1.2 APAC Turbine Cooler Revenue by Region (2021-2026)

6.2 APAC Turbine Cooler Sales by Product Architecture (2021-2026)

6.3 APAC Turbine Cooler 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 Turbine Cooler by Country

7.1.1 Europe Turbine Cooler Sales by Country (2021-2026)

7.1.2 Europe Turbine Cooler Revenue by Country (2021-2026)

7.2 Europe Turbine Cooler Sales by Product Architecture (2021-2026)

7.3 Europe Turbine Cooler 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 Turbine Cooler by Country

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

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

8.2 Middle East & Africa Turbine Cooler Sales by Product Architecture (2021-2026)

8.3 Middle East & Africa Turbine Cooler 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 Turbine Cooler

10.3 Manufacturing Process Analysis of Turbine Cooler

10.4 Industry Chain Structure of Turbine Cooler

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Turbine Cooler Distributors

11.3 Turbine Cooler Customer

12 WORLD FORECAST REVIEW FOR TURBINE COOLER BY GEOGRAPHIC REGION

12.1 Global Turbine Cooler Market Size Forecast by Region

12.1.1 Global Turbine Cooler Forecast by Region (2027-2032)

12.1.2 Global Turbine Cooler 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 Turbine Cooler Forecast by Product Architecture (2027-2032)

12.7 Global Turbine Cooler Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 RTX Corporation

13.1.1 RTX Corporation Company Information

13.1.2 RTX Corporation Turbine Cooler Product Portfolios and Specifications

13.1.3 RTX Corporation Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 RTX Corporation Main Business Overview

13.1.5 RTX Corporation Latest Developments

13.2 Honeywell International Inc.

13.2.1 Honeywell International Inc. Company Information

13.2.2 Honeywell International Inc. Turbine Cooler Product Portfolios and Specifications

13.2.3 Honeywell International Inc. Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Honeywell International Inc. Main Business Overview

13.2.5 Honeywell International Inc. Latest Developments

13.3 Liebherr-International AG

13.3.1 Liebherr-International AG Company Information

13.3.2 Liebherr-International AG Turbine Cooler Product Portfolios and Specifications

13.3.3 Liebherr-International AG Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Liebherr-International AG Main Business Overview

13.3.5 Liebherr-International AG Latest Developments

13.4 Safran S.A.

13.4.1 Safran S.A. Company Information

13.4.2 Safran S.A. Turbine Cooler Product Portfolios and Specifications

13.4.3 Safran S.A. Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Safran S.A. Main Business Overview

13.4.5 Safran S.A. Latest Developments

13.5 PBS GROUP

13.5.1 PBS GROUP Company Information

13.5.2 PBS GROUP Turbine Cooler Product Portfolios and Specifications

13.5.3 PBS GROUP Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 PBS GROUP Main Business Overview

13.5.5 PBS GROUP Latest Developments

13.6 Anova

13.6.1 Anova Company Information

13.6.2 Anova Turbine Cooler Product Portfolios and Specifications

13.6.3 Anova Turbine Cooler Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Anova Main Business Overview

13.6.5 Anova Latest Developments

13.7 Mayekawa Mfg. Co., Ltd.

13.7.1 Mayekawa Mfg. Co., Ltd. Company Information

13.7.2 Mayekawa Mfg. Co., Ltd. Turbine Cooler Product Portfolios and Specifications

13.7.3 Mayekawa Mfg. Co., Ltd. Turbine Cooler Sales, Revenue, Price and Gross

Margin (2021-2026)

13.7.4 Mayekawa Mfg. Co., Ltd. Main Business Overview

13.7.5 Mayekawa Mfg. Co., Ltd. Latest Developments

13.8 MIRAI INTEX s.r.o.

13.8.1 MIRAI INTEX s.r.o. Company Information

13.8.2 MIRAI INTEX s.r.o. Turbine Cooler Product Portfolios and Specifications

13.8.3 MIRAI INTEX s.r.o. Turbine Cooler Sales, Revenue, Price and Gross Margin

(2021-2026)

13.8.4 MIRAI INTEX s.r.o. Main Business Overview

13.8.5 MIRAI INTEX s.r.o. Latest Developments

13.9 AVIC Airborne Systems

13.9.1 AVIC Airborne Systems Company Information

13.9.2 AVIC Airborne Systems Turbine Cooler Product Portfolios and Specifications

13.9.3 AVIC Airborne Systems Turbine Cooler Sales, Revenue, Price and Gross

Margin (2021-2026)

13.9.4 AVIC Airborne Systems Main Business Overview

13.9.5 AVIC Airborne Systems Latest Developments

13.10 Parker Hannifin

13.10.1 Parker Hannifin Company Information

13.10.2 Parker Hannifin Turbine Cooler Product Portfolios and Specifications

13.10.3 Parker Hannifin Turbine Cooler Sales, Revenue, Price and Gross Margin

(2021-2026)

13.10.4 Parker Hannifin Main Business Overview

13.10.5 Parker Hannifin Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

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

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

Table 3. Major Players of Simple Expansion Turbine Cooler

Table 4. Major Players of Two-wheel Air Cycle Machine

Table 5. Major Players of Three-wheel Air Cycle Machine

Table 6. Major Players of Four-wheel / Advanced ACM

Table 7. Major Players of Other

Table 8. Global Turbine Cooler Sales by Product Architecture (2021-2026) & (Units)

Table 9. Global Turbine Cooler Sales Market Share by Product Architecture (2021-2026)

Table 10. Global Turbine Cooler Revenue by Product Architecture (2021-2026) & (\$ million)

Table 11. Global Turbine Cooler Revenue Market Share by Product Architecture (2021-2026)

Table 12. Global Turbine Cooler Sale Price by Product Architecture (2021-2026) & (K US\$/Unit)

Table 13. Major Players of Pneumatic Shaft-driven ACM

Table 14. Major Players of Motorized / Electrically Assisted ACM

Table 15. Major Players of Air-bearing / Foil-bearing ACM

Table 16. Major Players of Other

Table 17. Global Turbine Cooler Sales by Drive Concept (2021-2026) & (Units)

Table 18. Global Turbine Cooler Sales Market Share by Drive Concept (2021-2026)

Table 19. Global Turbine Cooler Revenue by Drive Concept (2021-2026) & (\$ million)

Table 20. Global Turbine Cooler Revenue Market Share by Drive Concept (2021-2026)

Table 21. Global Turbine Cooler Sale Price by Drive Concept (2021-2026) & (K US\$/Unit)

Table 22. Major Players of Cabin and Equipment Cooling Range

Table 23. Major Players of Low-temperature Air-cycle Range

Table 24. Major Players of Ultra-low Temperature Range

Table 25. Major Players of Other

Table 26. Global Turbine Cooler Sales by Temperature Range (2021-2026) & (Units)

Table 27. Global Turbine Cooler Sales Market Share by Temperature Range (2021-2026)

Table 28. Global Turbine Cooler Revenue by Temperature Range (2021-2026) & (\$ million)

Table 29. Global Turbine Cooler Revenue Market Share by Temperature Range (2021-2026)

Table 30. Global Turbine Cooler Sale Price by Temperature Range (2021-2026) & (K US\$/Unit)

Table 31. Major Players of OEM Linefit

Table 32. Major Players of Aftermarket Spares

Table 33. Major Players of Overhaul and Exchange Units

Table 34. Major Players of Retrofit and Upgrade Projects

Table 35. Major Players of Other

Table 36. Global Turbine Cooler Sales by Sales Channel and Lifecycle (2021-2026) & (Units)

Table 37. Global Turbine Cooler Sales Market Share by Sales Channel and Lifecycle (2021-2026)

Table 38. Global Turbine Cooler Revenue by Sales Channel and Lifecycle (2021-2026) & (\$ million)

Table 39. Global Turbine Cooler Revenue Market Share by Sales Channel and Lifecycle (2021-2026)

Table 40. Global Turbine Cooler Sale Price by Sales Channel and Lifecycle (2021-2026) & (K US\$/Unit)

Table 41. Global Turbine Cooler Sale by Application (2021-2026) & (Units)

Table 42. Global Turbine Cooler Sale Market Share by Application (2021-2026)

Table 43. Global Turbine Cooler Revenue by Application (2021-2026) & (\$ million)

Table 44. Global Turbine Cooler Revenue Market Share by Application (2021-2026)

Table 45. Global Turbine Cooler Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 46. Global Turbine Cooler Sales by Company (2021-2026) & (Units)

Table 47. Global Turbine Cooler Sales Market Share by Company (2021-2026)

Table 48. Global Turbine Cooler Revenue by Company (2021-2026) & (\$ millions)

Table 49. Global Turbine Cooler Revenue Market Share by Company (2021-2026)

Table 50. Global Turbine Cooler Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 51. Key Manufacturers Turbine Cooler Producing Area Distribution and Sales Area

Table 52. Players Turbine Cooler Products Offered

Table 53. Turbine Cooler Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 54. New Products and Potential Entrants

Table 55. Market M&A Activity & Strategy

Table 56. Global Turbine Cooler Sales by Geographic Region (2021-2026) & (Units)

Table 57. Global Turbine Cooler Sales Market Share Geographic Region (2021-2026)

Table 58. Global Turbine Cooler Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 59. Global Turbine Cooler Revenue Market Share by Geographic Region (2021-2026)

Table 60. Global Turbine Cooler Sales by Country/Region (2021-2026) & (Units)

Table 61. Global Turbine Cooler Sales Market Share by Country/Region (2021-2026)

Table 62. Global Turbine Cooler Revenue by Country/Region (2021-2026) & (\$ millions)

Table 63. Global Turbine Cooler Revenue Market Share by Country/Region (2021-2026)

Table 64. Americas Turbine Cooler Sales by Country (2021-2026) & (Units)

Table 65. Americas Turbine Cooler Sales Market Share by Country (2021-2026)

Table 66. Americas Turbine Cooler Revenue by Country (2021-2026) & (\$ millions)

Table 67. Americas Turbine Cooler Sales by Product Architecture (2021-2026) & (Units)

Table 68. Americas Turbine Cooler Sales by Application (2021-2026) & (Units)

Table 69. APAC Turbine Cooler Sales by Region (2021-2026) & (Units)

Table 70. APAC Turbine Cooler Sales Market Share by Region (2021-2026)

Table 71. APAC Turbine Cooler Revenue by Region (2021-2026) & (\$ millions)

Table 72. APAC Turbine Cooler Sales by Product Architecture (2021-2026) & (Units)

Table 73. APAC Turbine Cooler Sales by Application (2021-2026) & (Units)

Table 74. Europe Turbine Cooler Sales by Country (2021-2026) & (Units)

Table 75. Europe Turbine Cooler Revenue by Country (2021-2026) & (\$ millions)

Table 76. Europe Turbine Cooler Sales by Product Architecture (2021-2026) & (Units)

Table 77. Europe Turbine Cooler Sales by Application (2021-2026) & (Units)

Table 78. Middle East & Africa Turbine Cooler Sales by Country (2021-2026) & (Units)

Table 79. Middle East & Africa Turbine Cooler Revenue Market Share by Country (2021-2026)

Table 80. Middle East & Africa Turbine Cooler Sales by Product Architecture (2021-2026) & (Units)

Table 81. Middle East & Africa Turbine Cooler Sales by Application (2021-2026) & (Units)

Table 82. Key Market Drivers & Growth Opportunities of Turbine Cooler

Table 83. Key Market Challenges & Risks of Turbine Cooler

Table 84. Key Industry Trends of Turbine Cooler

Table 85. Turbine Cooler Raw Material

Table 86. Key Suppliers of Raw Materials

Table 87. Turbine Cooler Distributors List

Table 88. Turbine Cooler Customer List

Table 89. Global Turbine Cooler Sales Forecast by Region (2027-2032) & (Units)

Table 90. Global Turbine Cooler Revenue Forecast by Region (2027-2032) & (\$

millions)

Table 91. Americas Turbine Cooler Sales Forecast by Country (2027-2032) & (Units)

Table 92. Americas Turbine Cooler Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 93. APAC Turbine Cooler Sales Forecast by Region (2027-2032) & (Units)

Table 94. APAC Turbine Cooler Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 95. Europe Turbine Cooler Sales Forecast by Country (2027-2032) & (Units)

Table 96. Europe Turbine Cooler Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 97. Middle East & Africa Turbine Cooler Sales Forecast by Country (2027-2032) & (Units)

Table 98. Middle East & Africa Turbine Cooler Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 99. Global Turbine Cooler Sales Forecast by Product Architecture (2027-2032) & (Units)

Table 100. Global Turbine Cooler Revenue Forecast by Product Architecture (2027-2032) & (\$ millions)

Table 101. Global Turbine Cooler Sales Forecast by Application (2027-2032) & (Units)

Table 102. Global Turbine Cooler Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 103. RTX Corporation Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 104. RTX Corporation Turbine Cooler Product Portfolios and Specifications

Table 105. RTX Corporation Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 106. RTX Corporation Main Business

Table 107. RTX Corporation Latest Developments

Table 108. Honeywell International Inc. Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 109. Honeywell International Inc. Turbine Cooler Product Portfolios and Specifications

Table 110. Honeywell International Inc. Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 111. Honeywell International Inc. Main Business

Table 112. Honeywell International Inc. Latest Developments

Table 113. Liebherr-International AG Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 114. Liebherr-International AG Turbine Cooler Product Portfolios and

Specifications

Table 115. Liebherr-International AG Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 116. Liebherr-International AG Main Business

Table 117. Liebherr-International AG Latest Developments

Table 118. Safran S.A. Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 119. Safran S.A. Turbine Cooler Product Portfolios and Specifications

Table 120. Safran S.A. Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 121. Safran S.A. Main Business

Table 122. Safran S.A. Latest Developments

Table 123. PBS GROUP Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 124. PBS GROUP Turbine Cooler Product Portfolios and Specifications

Table 125. PBS GROUP Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 126. PBS GROUP Main Business

Table 127. PBS GROUP Latest Developments

Table 128. Anova Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 129. Anova Turbine Cooler Product Portfolios and Specifications

Table 130. Anova Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 131. Anova Main Business

Table 132. Anova Latest Developments

Table 133. Mayekawa Mfg. Co., Ltd. Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 134. Mayekawa Mfg. Co., Ltd. Turbine Cooler Product Portfolios and Specifications

Table 135. Mayekawa Mfg. Co., Ltd. Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 136. Mayekawa Mfg. Co., Ltd. Main Business

Table 137. Mayekawa Mfg. Co., Ltd. Latest Developments

Table 138. MIRAI INTEx s.r.o. Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 139. MIRAI INTEx s.r.o. Turbine Cooler Product Portfolios and Specifications

Table 140. MIRAI INTEx s.r.o. Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 141. MIRAI INTEX s.r.o. Main Business

Table 142. MIRAI INTEX s.r.o. Latest Developments

Table 143. AVIC Airborne Systems Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 144. AVIC Airborne Systems Turbine Cooler Product Portfolios and Specifications

Table 145. AVIC Airborne Systems Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 146. AVIC Airborne Systems Main Business

Table 147. AVIC Airborne Systems Latest Developments

Table 148. Parker Hannifin Basic Information, Turbine Cooler Manufacturing Base, Sales Area and Its Competitors

Table 149. Parker Hannifin Turbine Cooler Product Portfolios and Specifications

Table 150. Parker Hannifin Turbine Cooler Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 151. Parker Hannifin Main Business

Table 152. Parker Hannifin Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Turbine Cooler
- Figure 2. Turbine Cooler Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Turbine Cooler Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Turbine Cooler Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Turbine Cooler Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Turbine Cooler Sales Market Share by Country/Region (2025)
- Figure 10. Turbine Cooler Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Simple Expansion Turbine Cooler
- Figure 12. Product Picture of Two-wheel Air Cycle Machine
- Figure 13. Product Picture of Three-wheel Air Cycle Machine
- Figure 14. Product Picture of Four-wheel / Advanced ACM
- Figure 15. Product Picture of Other
- Figure 16. Global Turbine Cooler Sales Market Share by Product Architecture in 2026
- Figure 17. Global Turbine Cooler Revenue Market Share by Product Architecture (2021-2026)
- Figure 18. Product Picture of Pneumatic Shaft-driven ACM
- Figure 19. Product Picture of Motorized / Electrically Assisted ACM
- Figure 20. Product Picture of Air-bearing / Foil-bearing ACM
- Figure 21. Product Picture of Other
- Figure 22. Global Turbine Cooler Sales Market Share by Drive Concept in 2026
- Figure 23. Global Turbine Cooler Revenue Market Share by Drive Concept (2021-2026)
- Figure 24. Product Picture of Cabin and Equipment Cooling Range
- Figure 25. Product Picture of Low-temperature Air-cycle Range
- Figure 26. Product Picture of Ultra-low Temperature Range
- Figure 27. Product Picture of Other
- Figure 28. Global Turbine Cooler Sales Market Share by Temperature Range in 2026
- Figure 29. Global Turbine Cooler Revenue Market Share by Temperature Range (2021-2026)
- Figure 30. Product Picture of OEM Linefit
- Figure 31. Product Picture of Aftermarket Spares
- Figure 32. Product Picture of Overhaul and Exchange Units

Figure 33. Product Picture of Retrofit and Upgrade Projects

Figure 34. Product Picture of Other

Figure 35. Global Turbine Cooler Sales Market Share by Sales Channel and Lifecycle in 2026

Figure 36. Global Turbine Cooler Revenue Market Share by Sales Channel and Lifecycle (2021-2026)

Figure 37. Turbine Cooler Consumed in Commercial Aircraft

Figure 38. Global Turbine Cooler Market: Commercial Aircraft (2021-2026) & (Units)

Figure 39. Turbine Cooler Consumed in Military and Special Mission Aircraft

Figure 40. Global Turbine Cooler Market: Military and Special Mission Aircraft (2021-2026) & (Units)

Figure 41. Turbine Cooler Consumed in Rail and Public Transport HVAC

Figure 42. Global Turbine Cooler Market: Rail and Public Transport HVAC (2021-2026) & (Units)

Figure 43. Turbine Cooler Consumed in Industrial Low-temperature Refrigeration

Figure 44. Global Turbine Cooler Market: Industrial Low-temperature Refrigeration (2021-2026) & (Units)

Figure 45. Turbine Cooler Consumed in Other

Figure 46. Global Turbine Cooler Market: Other (2021-2026) & (Units)

Figure 47. Global Turbine Cooler Sale Market Share by Application (2025)

Figure 48. Global Turbine Cooler Revenue Market Share by Application in 2025

Figure 49. Turbine Cooler Sales by Company in 2025 (Units)

Figure 50. Global Turbine Cooler Sales Market Share by Company in 2025

Figure 51. Turbine Cooler Revenue by Company in 2025 (\$ millions)

Figure 52. Global Turbine Cooler Revenue Market Share by Company in 2025

Figure 53. Global Turbine Cooler Sales Market Share by Geographic Region (2021-2026)

Figure 54. Global Turbine Cooler Revenue Market Share by Geographic Region in 2025

Figure 55. Americas Turbine Cooler Sales 2021-2026 (Units)

Figure 56. Americas Turbine Cooler Revenue 2021-2026 (\$ millions)

Figure 57. APAC Turbine Cooler Sales 2021-2026 (Units)

Figure 58. APAC Turbine Cooler Revenue 2021-2026 (\$ millions)

Figure 59. Europe Turbine Cooler Sales 2021-2026 (Units)

Figure 60. Europe Turbine Cooler Revenue 2021-2026 (\$ millions)

Figure 61. Middle East & Africa Turbine Cooler Sales 2021-2026 (Units)

Figure 62. Middle East & Africa Turbine Cooler Revenue 2021-2026 (\$ millions)

Figure 63. Americas Turbine Cooler Sales Market Share by Country in 2025

Figure 64. Americas Turbine Cooler Revenue Market Share by Country (2021-2026)

Figure 65. Americas Turbine Cooler Sales Market Share by Product Architecture

(2021-2026)

Figure 66. Americas Turbine Cooler Sales Market Share by Application (2021-2026)

Figure 67. United States Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 68. Canada Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 69. Mexico Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 70. Brazil Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 71. APAC Turbine Cooler Sales Market Share by Region in 2025

Figure 72. APAC Turbine Cooler Revenue Market Share by Region (2021-2026)

Figure 73. APAC Turbine Cooler Sales Market Share by Product Architecture
(2021-2026)

Figure 74. APAC Turbine Cooler Sales Market Share by Application (2021-2026)

Figure 75. China Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 76. Japan Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 77. South Korea Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 78. Southeast Asia Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 79. India Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 80. Australia Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 81. China Taiwan Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 82. Europe Turbine Cooler Sales Market Share by Country in 2025

Figure 83. Europe Turbine Cooler Revenue Market Share by Country (2021-2026)

Figure 84. Europe Turbine Cooler Sales Market Share by Product Architecture
(2021-2026)

Figure 85. Europe Turbine Cooler Sales Market Share by Application (2021-2026)

Figure 86. Germany Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 87. France Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 88. UK Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 89. Italy Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 90. Russia Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 91. Middle East & Africa Turbine Cooler Sales Market Share by Country
(2021-2026)

Figure 92. Middle East & Africa Turbine Cooler Sales Market Share by Product
Architecture (2021-2026)

Figure 93. Middle East & Africa Turbine Cooler Sales Market Share by Application
(2021-2026)

Figure 94. Egypt Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 95. South Africa Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 96. Israel Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 97. Turkey Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

Figure 98. GCC Countries Turbine Cooler Revenue Growth 2021-2026 (\$ millions)

- Figure 99. Manufacturing Cost Structure Analysis of Turbine Cooler in 2026
- Figure 100. Manufacturing Process Analysis of Turbine Cooler
- Figure 101. Industry Chain Structure of Turbine Cooler
- Figure 102. Channels of Distribution
- Figure 103. Global Turbine Cooler Sales Market Forecast by Region (2027-2032)
- Figure 104. Global Turbine Cooler Revenue Market Share Forecast by Region (2027-2032)
- Figure 105. Global Turbine Cooler Sales Market Share Forecast by Product Architecture (2027-2032)
- Figure 106. Global Turbine Cooler Revenue Market Share Forecast by Product Architecture (2027-2032)
- Figure 107. Global Turbine Cooler Sales Market Share Forecast by Application (2027-2032)
- Figure 108. Global Turbine Cooler Revenue Market Share Forecast by Application (2027-2032)

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