

Global Turbine Generator Rotor Forging Market Growth 2026-2032

<https://marketpublishers.com/r/G745444C963FEN.html>

Date: July 2026

Pages: 129

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

ID: G745444C963FEN

Abstracts

The global Turbine Generator Rotor Forging market size is predicted to grow from US\$ 538 million in 2025 to US\$ 1019 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Turbine generator rotor forging refers to a high-end forging integrally formed from large alloy steel ingots via open-die forging, used to manufacture the core rotating components of turbine generators. It mainly consists of HP, IP and LP turbine rotors and the generator rotor itself. Under high-speed rotation at 1500-3000 r/min, the rotor withstands enormous centrifugal force, torque and bending stress, requiring high strength, high toughness, high magnetic permeability and high-temperature resistance (400-565°C). The material system primarily uses Ni-Cr-Mo-V series alloy steels, including grades 25Cr2Ni4MoV, 30Cr1Mo1V, and FB2 martensitic heat-resistant steel for ultra-supercritical units. As the 'heart' of power generation equipment, its manufacturing involves dozens of complex steps from smelting, ingot casting, open-die forging, heat treatment, precision machining to non-destructive testing, and its design and process complexity have long been a benchmark for a nation's heavy equipment industry.

Turbine generator rotor forging is one of the most technically demanding and value-added base components in heavy equipment manufacturing. It directly determines whether million-kilowatt thermal and nuclear power units can operate safely and stably for decades. Pricing: a million-kilowatt nuclear monoblock LP rotor can cost USD 5-8 million, while conventional 300-700 MW thermal rotors range from USD 0.5-1.2 million - heavily dependent on weight, material grade and supplier qualification. Margins are highly uneven: Japan Steel Works, with its global monopoly and extreme manufacturing capability, commands an estimated gross margin exceeding 40%;

Chinese leaders (CFHI, Sinomach Heavy) have achieved domestic breakthroughs in USC FB2 and nuclear rotors, with margins of 25?35%; newer entrants like Taiyuan Heavy face margins below 20% due to capacity ramp?up and prolonged customer certification. Downstream primary applications: coal?fired power accounts for 55?60% of rotor forging demand, nuclear power 25?30%, gas?steam combined cycle and industrial cogeneration 10?15%, others 5%. Incremental demand is driven by: (i) batch construction of China?s Hualong One reactors (peaking 2025?2028) and nuclear exports, boosting large?tonnage rotor demand; (ii) life extension and replacement of aging supercritical/ultra?supercritical units (620?C class) in China; (iii) increased flexibility requirements for gas power under the global energy transition, driving replacement of medium?small rotors. Landscape: the global high?end large?tonnage rotor market has long been dominated by Japan Steel Works (~80% of large nuclear forgings), with Doosan Enerbility, CFHI and Sinomach Heavy forming the second tier. Recent breakthroughs by CFHI and Sinomach Heavy in FB2 heat?resistant steel rotors and nuclear monoblock LP rotors are gradually breaking the overseas monopoly, but JSW still holds pricing power and process secrets. Taiyuan Heavy, Shanghai Electric and Dongfang Electric primarily serve the supporting and medium?small rotor segments, not yet in the global high?end core competition. Uncertainties include: new material challenges for ultra?supercritical units moving to 700?C+, which may render FB2 obsolete; pressure on new coal power projects from carbon?reduction policies, potentially shrinking the thermal rotor market in the long term; and tightened nuclear safety regulations extending certification cycles (often 3?5 years), hindering rapid capacity expansion for new entrants. Conclusion: Turbine generator rotor forging is an oligopolistic, high?barrier, high?value?added industry. Its growth is driven by batch nuclear construction, thermal unit refurbishment and domestic substitution. The structural features are extreme technical barriers, lengthy customer certification, and scarce extreme?scale manufacturing capacity. Over the next five years, Chinese leaders are likely to increase their global share in nuclear and USC rotors, but they will not unseat JSW from its dominant high?end position in the short term.

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

This Insight Report provides a comprehensive analysis of the global Turbine Generator

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

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

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

Segmentation by Type:

? 100 MW Class

100?300 MW Class

300?700 MW Class

700?1000 MW Class

> 1000 MW Class (incl. Nuclear)

Segmentation by Service Environment:

Subcritical / Supercritical (?566?) - NiCrMoV

Ultra?supercritical (600?620?) - FB2

Generator Rotor (Non?heat) - NiCrMoV / 26NiCrMoV

Low Pressure (LP) Rotor - NiCrMoV / Monobloc

Segmentation by Application:

Fossil Fuel Power (Coal, Gas)

Nuclear Power (PWR, CANDU)

Generator Rotor for Power Plant

Steam Turbine Retrofitting & Service

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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

Japan Steel Works (JSW)

Doosan Enerbility

China First Heavy Industries (CFHI)

Sinomach Heavy Equipment Group (SinoMach Heavy)

Taiyuan Heavy Industry (TZ)

Bharat Forge Limited

Larsen & Toubro Limited

Allegheny Technologies Incorporated (ATI)

Japan Casting & Forging (JCF)

Kobe Steel (KOBELCO)

Scot Forge

Arconic

Mitsubishi Heavy Industries (MHI)

Nippon Steel Corporation

Shanghai Electric (SEC)

Dongfang Electric

Bruck GmbH

Siempelkamp Giesserei

Key Questions Addressed in this Report

What is the 10-year outlook for the global Turbine Generator Rotor Forging market?

What factors are driving Turbine Generator Rotor Forging market growth, globally and by region?

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

How do Turbine Generator Rotor Forging market opportunities vary by end market size?

How does Turbine Generator Rotor Forging break out by Type, by Application?

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