

# Global Turbine Generators Above 1000MW Market Growth 2026-2032

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## Abstracts

The global Turbine Generators Above 1000MW market size is predicted to grow from US\$ 1296 million in 2025 to US\$ 2185 million in 2032; it is expected to grow at a CAGR of 7.8% from 2026 to 2032.

Turbine generator above 1000MW refers to a non-salient pole three-phase synchronous generator with rated power not less than 1000 megawatts, directly coupled to a steam turbine for converting mechanical energy into electrical energy. Its main components include stator (frame, core, winding), rotor (shaft, winding, retaining rings, fan), excitation system (brushless rotating or static excitation), and cooling system (water-hydrogen-hydrogen or full hydrogen cooling). This product category serves as the energy conversion terminal in ultra-supercritical coal-fired plants, large gas-steam combined cycle plants, and conventional islands of nuclear stations. At 50Hz grid frequency the rated speed is 3000 rpm, at 60Hz 3600 rpm (for nuclear half-speed units 1500/1800 rpm), with design efficiency no less than 98.5% and design life no less than 30 years. The 1000MW-class turbine generator carries the dual mission of base-load operation and deep peak regulation in large power grids. Each 100MW increase in single-unit capacity reduces specific coal consumption by approximately 2-3 g/kWh, while substantially lowering plant footprint and operating costs. Against the backdrop of global energy transition, this category is a critical flexibility resource enabling high penetration of renewable energy, and serves as a hallmark product that demonstrates a nation's comprehensive capability in heavy power equipment design, precision manufacturing, and intelligent operation & maintenance.

Turbine generators above 1000MW represent the premium segment of heavy power equipment, with high unit prices and gross margins closely tied to project customization. In 2025, China's 'Big Three' (Shanghai Electric, Dongfang Electric, Harbin Electric)

dominate the 1000MW class thermal generator market, achieving gross margins of 20%-28% for thermal units and 30%-35% for half-speed nuclear units, the latter due to stricter safety and qualification requirements. Foreign players (GE, Siemens Energy, Mitsubishi, Toshiba) largely rely on technology licensing and joint manufacturing, with their direct share in new coal-fired orders continuing to shrink, though they maintain a strong presence in gas combined cycle and nuclear islands. Downstream, ultra-supercritical coal-fired plants account for about 80% of annual deliveries, nuclear conventional islands for 15%, and large gas combined cycle with industrial cogeneration for the remaining 5%. Emerging markets (India, Indonesia, Vietnam, Bangladesh, Middle East) have become key growth drivers for new orders, while domestic projects are shifting toward double-reheat, high-efficiency, low-carbon designs, demanding deeper leading-phase capability and greater peak-regulation flexibility from generators. Incremental demand comes from three sources: first, power-short regions in Southeast and South Asia are still expanding 1000MW coal-fired capacity, with export orders rising about 15% year-on-year in 2025; second, domestic life-extension and upgrade projects for early-2000s 1000MW units (rotor replacement, stator rewinds) are entering a busy cycle; third, batch construction of nuclear units in China, India and Korea creates steady demand for half-speed turbine generators. The competitive landscape follows a dual-track structure: China's 'Big Three' lead in new thermal generator deliveries (over 70% of global volume), while GE, Siemens and Mitsubishi retain core technology and supply of key materials (high-strength rotor forgings, insulation systems) for large nuclear half-speed units, advanced synchronous condensers, and high-value engineering services. Key uncertainties include: first, long-term pressure on coal-fired generator exports from global coal phase-down policies and the EU Carbon Border Adjustment Mechanism; second, the impact of gas combined-cycle unit dynamics and potential carbon capture (CCUS) retrofits on conventional condensing generator operating regimes; third, supply stability of rotor forgings and high-grade electrical steel, along with certification barriers for Chinese equipment in overseas high-end tenders. In summary, the turbine generator market above 1000MW will see moderate single-digit growth, with peak new installation volumes behind us; however, aftermarket services, nuclear incremental capacity and emerging-market exports provide structural support. Local OEMs must shift from pure equipment supply to 'equipment + service + upgrades' to sustain profitability.

LP Information, Inc. (LPI)' newest research report, the 'Turbine Generators Above 1000MW Industry Forecast' looks at past sales and reviews total world Turbine Generators Above 1000MW sales in 2025, providing a comprehensive analysis by region and market sector of projected Turbine Generators Above 1000MW sales for

2026 through 2032. With Turbine Generators Above 1000MW sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Turbine Generators Above 1000MW industry.

This Insight Report provides a comprehensive analysis of the global Turbine Generators Above 1000MW 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 Generators Above 1000MW portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Turbine Generators Above 1000MW market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Turbine Generators Above 1000MW 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 Generators Above 1000MW.

This report presents a comprehensive overview, market shares, and growth opportunities of Turbine Generators Above 1000MW market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

1000MW Class

1100MW Class

1200MW Class and above

#### Segmentation by Cooling Technology:

Water?Hydrogen?Hydrogen Cooling (W?H?H)

Full Hydrogen Cooling

Air Cooling (TEWAC)

Segmentation by Application:

Ultra?supercritical Coal?fired Power

Nuclear Power (Conventional Island)

Large Combined Cycle Gas Plant

Industrial Cogeneration

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.

Shanghai Electric Power Generation Equipment

Dongfang Electric Machinery

Harbin Electric Machinery

GE Steam Power

Siemens Energy

Mitsubishi Heavy Industries

Toshiba Energy Systems

Doosan Enerbility

Hitachi

Russian Power Machines (Elektrosila)

Ansaldo Energia

Bharat Heavy Electricals

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global Turbine Generators Above 1000MW market?

What factors are driving Turbine Generators Above 1000MW market growth, globally and by region?

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

How do Turbine Generators Above 1000MW market opportunities vary by end market size?

How does Turbine Generators Above 1000MW break out by Type, by Application?

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