

Global Ultra-heavy Steam Turbine Rotor Forgings for Generators above 1000MW Market Growth 2026-2032

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Abstracts

The global Ultra-heavy Steam Turbine Rotor Forgings for Generators above 1000MW market size is predicted to grow from US\$ 342 million in 2025 to US\$ 683 million in 2032; it is expected to grow at a CAGR of 8.8% from 2026 to 2032.

Ultra-heavy steam turbine rotor forgings for generators above 1000MW refer to integral rotor blanks manufactured from vacuum-melted ingots of 600 metric tons or above, forged under a press of at least 10,000 metric tons, and intended for constructing 1000MW-class ultra-supercritical thermal turbine generators (full-speed units at 3000/3600 rpm). These forgings must operate continuously for decades under extreme conditions: temperatures up to 620°, pressures up to 35MPa, and centrifugal forces at 3000 rpm. They are typically made from advanced martensitic or modified ferritic heat-resistant steels (e.g., FB2, G115), requiring exceptional creep-rupture strength, low ductile-brittle transition temperature, excellent high-cycle fatigue resistance, and rigorous center soundness. This product category represents a pinnacle of global heavy-duty extreme manufacturing, as its domestic production capability directly determines a country's ability to independently build ultra-supercritical coal plants and large nuclear stations, and serves as the ultimate yardstick for a nation's heavy forging industry.

Ultra-heavy rotor forgings for 1000MW and above thermal turbine generators represent the pinnacle of extreme manufacturing, characterized by high unit prices and extremely long lead times. In 2025-2026, imported FB2 HP/IP rotor forgings are priced at 3.0 to 4.0 million US dollars per unit, while domestic equivalents range from 2.0 to 2.5 million US dollars per unit; LP rotor forgings (70 to 110 tons) command 3.5 to 5.0 million US dollars each. Gross margins diverge sharply: Japan Steel Works, with its long-standing monopoly and mature process database, maintains margins of 35% to 45%; China's

First Heavy Industries and Erzhong Equipment, still in import substitution ramp up, achieve 20% to 25% but with room for improvement as batch orders and process stabilization progress. Cost structures are dominated by ingot melting (including specialty alloys and vacuum treatment), accounting for 40% to 50% of total cost; heavy forging and heat treatment account for 25% to 30%; NDT and rough machining account for 15% to 20%. Downstream, new 1000MW+ ultra-supercritical coal units absorb about 85% of annual rotor forging consumption, life extension and efficiency upgrades (HP/IP rotor replacement) account for 10%, and strategic reserves and exports for 5%. The core driver of incremental demand is the baseload power necessity for AI data centers: in 2026, 104 coal projects are scheduled for commissioning globally (85 in China alone); GE Vernova's heavy-duty gas turbine order book is sold out through 2031 with a 20% price hike; Siemens Energy's backlog stands at 60 billion US dollars. These directly boost procurement of 1000MW class turbine generators, cascading to rotor forgings. Supply-side rigidities are stark: only five companies globally have proven capacity – Japan Steel Works, CFHI, Erzhong Equipment, France's Creusot Forge, and Doosan Enerbility – but the latter two have significantly reduced influence. JSW plans to raise capacity to 1.5 times by fiscal year 2028, but this will take years to materialize, leaving a supply gap throughout. The competitive landscape features a 'one superpower, two challengers' structure: JSW remains the high-end monopolist thanks to its decades-long process database; CFHI and Erzhong are rapidly catching up, having achieved full import substitution for FB2 series forgings. In the first quarter of 2026, Erzhong secured batch orders for both thermal and nuclear rotor forgings, while CFHI completed its first 620°C FB2 forging for Shanghai Electric, and G115 novel martensitic steel saw engineering application in the world's first 630°C double-reheat unit – signaling Chinese firms taking early lead in next-generation material grades. Key uncertainties include: first, the speed of yield learning curve for CFHI and Erzhong from prototype to stable mass production; second, whether AI data center build-out accelerates beyond current projections, widening the supply-demand imbalance; third, the pace of commercialization of materials for 630°C+ advanced ultra-supercritical units, which will determine the timeline for next-generation material transition. In summary, rotor forgings above 1000MW will face sustained supply shortages over the next five years, with pricing power shifting upward. The pace of import substitution will determine downstream turbine manufacturers' bargaining power and supply chain security, while the inherently time-consuming nature of extreme manufacturing process accumulation (not replicable by short-term capital investment) will keep strategic value persistently high.

LP Information, Inc. (LPI) ' newest research report, the 'Ultra-heavy Steam Turbine Rotor Forgings for Generators above 1000MW Industry Forecast' looks at past sales

and reviews total world Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW sales in 2025, providing a comprehensive analysis by region and market sector of projected Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW sales for 2026 through 2032. With Ultra?heavy Steam Turbine Rotor Forgings for 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 Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW industry.

This Insight Report provides a comprehensive analysis of the global Ultra?heavy Steam Turbine Rotor Forgings for 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 Ultra?heavy Steam Turbine Rotor Forgings for 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 Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Ultra?heavy Steam Turbine Rotor Forgings for 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 Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW.

This report presents a comprehensive overview, market shares, and growth opportunities of Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Traditional Ferritic Steel (30Cr1Mo1V, max service temp 535-566°C, 10?h creep strength 80-120 MPa)

Advanced Ferritic Steel (FB2, 10%Cr, max service temp 600-620°C, 10?h creep strength 130-160 MPa)

Novel Martensitic Steel (G115, MarBN, max service temp 630-650°C, 10⁵h creep strength ≥180 MPa)

Segmentation by Ultrasonic Testing Acceptance Levels:

Class 1 (single flat-bottom hole equivalent ≤1.0mm, no clustered indications, no cracks)

Class 2 (equivalent flat-bottom hole ≤2.0mm, isolated indications allowed, no cracks)

Class 3 (equivalent flat-bottom hole ≤3.0mm, limited cluster allowed, no linear defects)

Segmentation by Application:

New Ultra-supercritical Coal Power (1000MW+)

Existing Unit Life Extension & Efficiency Upgrade

Nuclear Half-speed Turbine Generators

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

China First Heavy Industries

China Erzhong Equipment (DEC)

France Creusot Forge (ex?Areva/Le Creusot)

Doosan Enerbility

Key Questions Addressed in this Report

What is the 10-year outlook for the global Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW market?

What factors are driving Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW market growth, globally and by region?

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

How do Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW market opportunities vary by end market size?

How does Ultra?heavy Steam Turbine Rotor Forgings for Generators above 1000MW break out by Type, by Application?

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