

Steam Turbines Market by Type (Steam Cycle, Combined Cycle and Cogeneration), by Rated Capacity (1-120 MW, 121-350 MW, 351-750 MW and Above 750 MW), by Exhaust Type (Condensing and Noncondensing), by Application (Coal, Nuclear, Biomass and Others) and by Region (Americas, Asia-Pacific, Europe and Middle East & Africa) - Global Trends and Forecasts to 2020

<https://marketpublishers.com/r/SF13705F53CEN.html>

Date: November 2015

Pages: 167

Price: US\$ 5,650.00 (Single User License)

ID: SF13705F53CEN

Abstracts

Steam turbines market to grow at a CAGR of 4.4% during the forecast period 2015-2020

The steam turbines market is expected to reach a market size of USD 19,292 million by 2020, at a CAGR of 4.4% from 2015 to 2020. Growing investment in thermal power generation infrastructure, particularly in emerging economies, is driving the demand for steam turbines across the globe. Utilities across Asia-Pacific and the Middle East & Africa are expanding generation capacity to meet growing domestic electricity demand.

Steam turbines find important application in gas-fired combined cycle plants, as well as Combined Heat and Power (CHP/Cogeneration) plants. The increasing number of natural gas based combined cycle plants in the Americas and the Middle East, where natural gas prices have been very affordable over the past decade, is also increasing the demand for steam turbines.

Application in coal dominates the global market:

Coal application of steam turbine held the largest market share in terms of value, across all regions of the world, except Europe, where nuclear application was ahead by a wide margin. Asia-Pacific in particular was heavily dominated by coal application, and the region is expected to witness the highest growth for this application during the forecast period. However, growth will be subdued in the Americas and especially Europe, as policy measures by authorities make it tougher to build new fossil fuel fired power plants.

Asia-Pacific: The fastest growing region for steam turbine market

Asia-Pacific is home to some of the fastest growing emerging economies in the world and has the largest share of human population among all regions. Increasing demand for electricity in the region coupled with the intent of respective countries to plug the demand and supply gap has led to large scale plans for capacity expansion. China and India, two of the largest economies in the region, are together expected to add close to 60% of all new thermal power generation capacity in the world in the next five years. These infrastructure investments are projected to drive demand for steam turbines at a healthy pace.

Leading players of this market have been profiled with their recent developments and other strategic activities. These include Alstom SA (France), Siemens AG (Germany), General Electric (U.S.), Mitsubishi Hitachi Power Systems (Japan), and Toshiba Corporation (Japan) among others.

The report provides a comprehensive view about the steam turbines market. The factors that are driving demand, restraining growth, creating opportunities, and posing challenges to the market have been analyzed, while the leading players that hold the most competitive advantage have been profiled. Stakeholders such as steam turbine manufacturers, component suppliers, industry associations, policy think tanks, government planning departments, and independent market observers can utilize this information to understand the market and leverage the information to their business advantage.

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