

Industrial Centrifugal Compressor Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

EXECUTIVE SUMMARY AND INDUSTRY INTRODUCTION

The global industrial landscape is undergoing a profound transformation driven by the dual mandates of macroeconomic expansion and aggressive decarbonization. At the core of this transition lies the industrial centrifugal compressor, a critical piece of turbomachinery designed to manage large volumes of gas with high efficiency and reliability. As an essential component across multiple heavy industries, the industrial centrifugal compressor market is experiencing shifting dynamics characterized by rigorous environmental regulations, complex supply chain realignments, and the rapid emergence of novel energy applications.

Technologically, a centrifugal compressor is a dynamic turbocompressor in which the gas flows radially through the impeller channels. The direction of gas flow is perpendicular to the axis of rotation. The equipment operates by utilizing a high-speed rotating impeller to exert work on the gas, applying centrifugal force to accelerate the fluid and subsequently converting this kinetic energy into static pressure energy within a diffuser and volute. This continuous flow mechanism allows for large capacity handling, oil-free gas delivery, and extended operational lifespans with minimal vibration, making it the preferred choice for mission-critical industrial processes.

The demand for these highly engineered machines is fundamentally tied to industrial scale expansion, the relentless pursuit of energy conversion efficiency, and continuous technological innovation. As global energy demands escalate, industries increasingly require equipment that ensures continuous, high-efficiency operation while simultaneously lowering overall energy consumption and operational expenditures. Furthermore, the tightening of global environmental legislation has forced industrial

operators to prioritize energy efficiency, strict emission controls, and long-term operational stability. Owing to their high performance and relatively low emission profiles, centrifugal compressors have emerged as the premier equipment for capacity upgrades and greenfield projects across both traditional and emerging sectors.

MARKET SIZING AND FORECAST

Reflecting the sustained industrial demand and the necessary capital expenditures required for the global energy transition, the global industrial centrifugal compressor market is projected to reach a valuation ranging between 7.5 billion USD and 12.5 billion USD by the year 2026.

Moving forward into the medium to long term, the market is expected to exhibit steady, resilient growth. Between 2026 and 2031, the compound annual growth rate is estimated to range from 3 percent to 5 percent. This growth trajectory is underpinned by a dual-engine dynamic: the continuous baseline demand for replacement and optimization in traditional process industries, coupled with an accelerated surge in capital expenditures directed toward clean energy infrastructure, carbon capture technologies, and next-generation energy storage solutions.

SEGMENTATION ANALYSIS BY TYPE

The industrial centrifugal compressor market is distinctly segmented based on power output, tonnage, and application complexity, dividing broadly into large heavy-duty and small light-duty classifications.

LARGE HEAVY-DUTY CENTRIFUGAL COMPRESSORS

Large heavy-duty centrifugal compressors represent the most technologically advanced and capital-intensive segment of the market. These machines are typically defined by power ratings exceeding 2,000 kW, with common operational ranges stretching from 2,000 kW up to a massive 150,000 kW. Physically, these units are monumental, with weights ranging from 20 tons to upwards of 500 tons.

Compared to their lighter counterparts, heavy-duty compressors are characterized by an extreme degree of customization, immense technological complexity, and large-scale manufacturing requirements. Each unit is bespoke, engineered to meet the precise thermodynamic and aerodynamic parameters of the specific industrial plant it

will serve. The engineering tolerances are microscopic, despite the massive scale of the rotating components. These heavy-duty machines form the beating heart of large-scale operations including petroleum refining, petrochemical complexes, long-distance natural gas pipeline transport, coal chemical processing, utility-scale air separation units, and modern compressed air energy storage facilities. The barrier to entry in this segment is exceptionally high, requiring decades of proprietary aerodynamic data, advanced metallurgy, and massive precision-machining infrastructure.

SMALL LIGHT-DUTY CENTRIFUGAL COMPRESSORS

Small light-duty centrifugal compressors operate at power ratings below 2,000 kW and typically weigh less than 20 tons. While less massive, these machines require high levels of precision and reliability. They are widely deployed in sectors where clean, oil-free, and reliable compressed air or gas is required at lower volumes. Primary end-user industries include food and beverage processing, pharmaceutical manufacturing, textile production, and various environmental protection applications such as wastewater aeration. This segment benefits from a higher degree of standardization and modularity, allowing for faster production cycles, easier installation, and more predictable maintenance schedules.

SEGMENTATION ANALYSIS BY APPLICATION

The end-use applications for industrial centrifugal compressors are broad, reflecting the equipment's versatility. The market can be divided into four primary verticals: Oil and Gas, Energy and Storage, Process Industry, and Others.

OIL AND GAS

The oil and gas sector remains a foundational pillar for heavy-duty centrifugal compressors. In upstream operations, they are utilized for gas gathering, gas lift, and reinjection to maintain reservoir pressure. In midstream applications, they are essential for pipeline boosting stations, ensuring the flow of natural gas over vast continental distances, as well as serving as the primary refrigeration compressors in liquefied natural gas facilities. Downstream, modern refineries rely heavily on centrifugal compressors for fluid catalytic cracking, hydrocracking, and various desulfurization processes.

ENERGY AND STORAGE

This application segment represents the highest growth potential over the forecast period, driven entirely by the global mandate for a low-carbon economy. As the penetration of intermittent renewable energy sources like wind and solar increases, the need for grid-scale energy storage has become critical. Compressed Air Energy Storage utilizes surplus renewable electricity to drive massive centrifugal compressors, storing high-pressure air in underground caverns. During peak demand, this air is released to generate power.

Additionally, the burgeoning hydrogen economy requires specialized centrifugal compressors to handle the exceptionally low molecular weight of hydrogen gas, necessitating advanced aerodynamic designs and specialized materials to prevent hydrogen embrittlement. Similarly, the scaling up of Carbon Capture, Utilization, and Storage networks requires massive centrifugal compressors to compress captured carbon dioxide to supercritical states for pipeline transport and deep geologic sequestration. The production of green synthetic fuels, including green ammonia and green methanol, also requires intensive, high-pressure centrifugal compression.

PROCESS INDUSTRY

The process industry encompasses traditional heavy manufacturing sectors, notably chemicals, petrochemicals, metallurgy, and air separation. In petrochemicals, massive multi-stage centrifugal compressors are the core of ethylene cracking plants, compressing cracked gas through complex refrigeration cycles. Air separation units rely on these machines to compress ambient air before cryogenic distillation, producing industrial quantities of oxygen, nitrogen, and argon essential for steelmaking, electronics manufacturing, and healthcare.

OTHERS

Other applications include industrial utilities, large-scale commercial HVAC systems, the pharmaceutical sector, food processing, textile manufacturing, and municipal environmental services. In these domains, the focus is largely on energy-efficient, light-duty centrifugal compressors capable of delivering ultra-pure, oil-free air to prevent product contamination and ensure compliance with stringent health and safety

regulations.

REGIONAL MARKET ANALYSIS

The geographic distribution of the industrial centrifugal compressor market reflects underlying shifts in global manufacturing, capital deployment, and energy policy.

ASIA-PACIFIC

The Asia-Pacific region stands as the largest market globally for industrial centrifugal compressors. Within this region, China represents the largest single market globally. The demand in China is propelled by a combination of massive petrochemical capacity expansions, heavy investments in domestic natural gas infrastructure, and an aggressive push toward its dual-carbon goals, which has triggered widespread investments in compressed air energy storage and green hydrogen projects. Beyond China, rapid industrialization and urbanization in India are driving the construction of new refineries, fertilizer plants, and city gas distribution networks. Advanced manufacturing hubs in Japan, South Korea, and Taiwan, China also contribute to continuous demand, particularly for highly specialized, ultra-reliable compressors used in semiconductor fabrication, advanced electronics, and specialized chemical production. The region benefits from both high domestic demand and a rapidly maturing local manufacturing base.

NORTH AMERICA

North America represents the second-largest market globally. The United States dominates this regional market, accounting for more than 85 percent of North American demand. The US market is fundamentally driven by its position as a global leader in natural gas production and LNG exports. Massive infrastructure projects along the Gulf Coast, including LNG liquefaction trains and petrochemical expansions, require heavy-duty centrifugal compressors. Furthermore, landmark legislation such as the Inflation Reduction Act is fundamentally altering the market landscape. The generous tax credits provided for carbon capture and clean hydrogen production are triggering a wave of greenfield projects, generating substantial new demand for advanced compression technologies.

EUROPE

Europe is the third-largest regional market. The dynamics in Europe are heavily influenced by stringent environmental regulations, aggressive decarbonization targets under the European Green Deal, and recent geopolitical imperatives to re-engineer energy supply chains. Following the curtailment of Russian pipeline gas, Europe has heavily invested in LNG import terminals and interconnecting pipelines, driving localized compressor demand. Moreover, European industrial operators lead the world in upgrading legacy equipment to high-efficiency, variable-speed centrifugal compressors to minimize energy consumption and comply with strict emission mandates. Europe is also a primary testing ground for advanced hydrogen networks and green steel initiatives, further stimulating demand for highly customized compression solutions.

MIDDLE EAST AND AFRICA

The Middle East and Africa represent the fourth-largest market. The region is dominated by national oil companies in the Gulf Cooperation Council states, particularly Saudi Arabia, the United Arab Emirates, and Qatar. While immense capital is still being deployed into traditional upstream oil capacity and massive LNG expansion projects (such as Qatar's North Field expansion), these nations are also aggressively diversifying. They are investing heavily in blue hydrogen, green hydrogen, and massive carbon capture facilities to future-proof their economies. This dual investment strategy in both fossil and low-carbon infrastructure ensures robust, sustained demand for heavy-duty centrifugal compressors in the region.

SOUTH AMERICA

South America is the fifth-largest market. Demand here is highly concentrated in a few key nations and sectors. Brazil leads the region, driven predominantly by its deepwater pre-salt offshore oil and gas developments. The proliferation of Floating Production Storage and Offloading vessels necessitates highly compact, incredibly reliable centrifugal compressors capable of operating in harsh marine environments. Argentina also presents growth opportunities tied to the development of the Vaca Muerta shale play, which requires significant midstream gas gathering and processing infrastructure. Additionally, the massive mining sectors in Chile and Peru provide a steady base of demand for process and utility air compressors.

SUPPLY CHAIN AND VALUE CHAIN ANALYSIS

The value chain of the industrial centrifugal compressor industry is highly complex, globalized, and deeply interdependent.

UPSTREAM

The upstream segment of the value chain consists of the supply of raw materials and critical proprietary components. Raw materials include high-grade metallic alloys such as cast iron, advanced aluminum alloys, carbon steel, duplex stainless steel, and occasionally titanium for highly corrosive environments. These metals are used to cast, forge, and machine the heavy casings, impellers, and rotor shafts. Additionally, advanced plastics and synthetic rubbers are required for dynamic and static seals, while complex electronic components are utilized in programmable logic controllers, vibration monitors, and variable frequency drives.

Raw material price volatility, driven by global commodity market fluctuations, directly impacts the manufacturing cost base and competitive pricing strategies of compressor OEMs. A sudden spike in stainless steel or nickel prices can significantly compress margins if not mitigated by strategic procurement contracts.

Beyond raw materials, the upstream chain includes suppliers of specialized ancillary equipment. A complete centrifugal compressor train requires a prime mover—either a high-voltage electric motor, a steam turbine, or a gas turbine. Furthermore, complex lube oil stations, dry gas seal panels, advanced aerodynamic valves, and cooling arrays are required. The performance of these ancillary systems is inseparable from the performance of the compressor itself, demanding that suppliers possess high-precision manufacturing capabilities and rigorous quality control processes.

MIDSTREAM

The midstream encompasses the core Original Equipment Manufacturers. The manufacturing of centrifugal compressors—especially large heavy-duty units—is characterized by extreme precision engineering. The core components consist of the rotating elements (impellers and main shafts), the stationary elements (casings and aerodynamic diffusers), the bearing and dry gas seal systems, the drive mechanisms, and the auxiliary control and lubrication systems.

The manufacturing process involves highly advanced 5-axis computer numerical control machining to create complex, three-dimensional aerodynamic impeller blades. Following assembly, these machines must undergo rigorous mechanical running tests and aerodynamic performance tests to ensure they meet stringent international standards, such as those set by the American Petroleum Institute. System integration is a critical value-add in this stage, where the OEM ensures the seamless mechanical and digital interaction between the prime mover, the compressor, and the plant control system.

DOWNSTREAM

The downstream segment involves Engineering, Procurement, and Construction contractors and the final industrial end-users. The relationship between OEMs and end-users has evolved from simple equipment provision to lifecycle partnership. The Total Cost of Ownership—which includes initial capital expenditure, ongoing energy costs, and maintenance over a lifespan of 20 to 30 years—is the primary metric for procurement. Consequently, aftermarket services, including predictive maintenance utilizing industrial internet of things sensors, spare parts provisioning, and aerodynamic rerating of older machines, constitute a highly lucrative and stable revenue stream for compressor manufacturers.

COMPANY PROFILES

The competitive landscape of the industrial centrifugal compressor market features a mix of globally diversified heavy engineering conglomerates and specialized turbomachinery manufacturers.

EVERLLENCE: Positioned as a specialized player, Everllence focuses on delivering highly engineered, customized compression solutions. The company competes by offering agile engineering services, rapid prototyping, and specialized aerodynamic designs tailored to niche process gas applications.

SIEMENS ENERGY: A titan in the global turbomachinery landscape, Siemens Energy boasts an immense installed base worldwide. The company offers a comprehensive portfolio spanning both traditional fossil fuel applications and cutting-edge energy transition technologies. Siemens Energy is at the forefront of developing zero-emission compression solutions, integrating advanced

variable frequency drives, and pioneering large-scale hydrogen and carbon capture compression trains.

BAKER HUGHES: Operating at the pinnacle of the oil and gas turbomachinery sector, Baker Hughes commands significant market share in LNG refrigeration and offshore compression. The company's heavy-duty centrifugal compressors are globally recognized for their rugged reliability in extreme environments. Baker Hughes is actively leveraging its deep heritage in natural gas to transition into CCUS and hydrogen infrastructure.

CHART INDUSTRIES: Known globally for its expertise in cryogenic engineering and gas processing, Chart Industries plays a critical role in the air separation and LNG value chains. Their compression solutions are highly synergistic with their broader portfolio of heat exchangers and cryogenic storage tanks, allowing them to offer highly integrated gas processing packages.

ATLAS COPCO: Operating with a relentless focus on energy efficiency and lifecycle cost reduction, Atlas Copco is a dominant force in both the light-duty and medium-duty centrifugal compressor segments. The company is a pioneer in integrating advanced variable speed drive technologies and highly efficient aerodynamic designs, making them a preferred supplier for process industries focused on reducing their carbon footprint.

INGERSOLL RAND: A globally recognized brand with a vast and diversified product portfolio. Ingersoll Rand excels in providing robust, reliable centrifugal compressors for a wide array of industrial applications, from air separation to manufacturing utilities. Their extensive global service network and focus on aftermarket solutions provide strong competitive advantages.

KOBELCO: Representing Japanese engineering excellence, Kobelco has a deeply entrenched position in the process gas compressor market. They are highly regarded for their bespoke engineering capabilities, particularly in the chemical, petrochemical, and metallurgy sectors, providing highly reliable centrifugal machines capable of handling complex, corrosive gas mixtures.

HYUNDAI HEAVY INDUSTRIES TURBOMACHINERY: Leveraging the massive industrial and shipbuilding footprint of its parent conglomerate, Hyundai Heavy Industries Turbomachinery excels in delivering large-scale, heavy-duty compressors. They are particularly strong in the Asian and Middle Eastern

markets, often providing integrated EPC and equipment packages for refineries, offshore platforms, and petrochemical complexes.

HITACHI INDUSTRIAL PRODUCTS LTD.: Hitachi brings profound expertise in fluid dynamics and materials science to the centrifugal compressor market. The company is recognized for pushing the boundaries of high-pressure and high-flow applications, catering primarily to massive downstream oil and gas facilities, natural gas pipelines, and large-scale industrial chemical processes.

SHENGU GROUP: A pivotal player in the domestic Chinese market, ShenGu Group has developed formidable capabilities in manufacturing large-scale, heavy-duty centrifugal compressors. They are a primary supplier for mega-scale air separation units, domestic pipeline projects, and massive petrochemical expansions within China, increasingly competing on the global stage through steady technological maturation.

XI'AN SHAANGU POWER CO.LTD.: A leading Chinese enterprise specializing in distributed energy systems and heavy turbomachinery. Shaangu Power holds a dominant position in the metallurgical and chemical sectors within the Asia-Pacific region. The company has aggressively expanded its capabilities into energy recovery and high-efficiency axial-centrifugal combined compressor trains, capturing significant market share in the industrial energy transition space.

MARKET OPPORTUNITIES AND CHALLENGES

OPPORTUNITIES

The industrial centrifugal compressor market is currently navigating a period of unprecedented opportunity, almost entirely underwritten by the global mandate to mitigate climate change. The global energy transition and the pursuit of low-carbon economies have catalyzed the emergence of entirely new industrial sectors.

The rapid commercialization of Compressed Air Energy Storage systems presents a massive growth vector. Because CAES relies on compressing vast volumes of air to high pressures to store grid-scale renewable energy, it demands the largest, most advanced heavy-duty centrifugal compressors available.

Similarly, the hydrogen economy represents a frontier of immense potential. The transportation, storage, and utilization of hydrogen—whether blue or green—require sophisticated centrifugal compressors designed with advanced metallurgy to prevent hydrogen embrittlement at high operational speeds.

Carbon Capture, Utilization, and Storage networks also present a structural shift in demand. Capturing carbon dioxide from industrial flue gases and compressing it to a supercritical fluid state for transport requires immense kinetic energy, positioning heavy-duty centrifugal compressors as the critical enabling technology for global decarbonization efforts.

Furthermore, as governments worldwide ratify international climate agreements, there is a unified consensus to penalize carbon emissions and subsidize green infrastructure. This regulatory environment accelerates the retirement of outdated, inefficient equipment, forcing industrial operators to retrofit their facilities with state-of-the-art, high-efficiency centrifugal compressors.

CHALLENGES

Despite the robust growth trajectory, the market faces several formidable challenges. The foremost restraint is the inherently high initial capital expenditure associated with heavy-duty centrifugal compressors. These machines require massive upfront investments in engineering, specialized materials, and rigorous testing. In an environment of elevated global interest rates and macroeconomic uncertainty, industrial operators may delay final investment decisions on large greenfield projects.

Furthermore, the volatility of raw material prices poses a constant threat to OEM profit margins. Because centrifugal compressors are often ordered with lead times extending from 12 to 24 months, sudden fluctuations in the cost of high-grade steel, advanced alloys, and specialized electronic components can severely impact the profitability of fixed-price contracts.

Technologically, as industries push towards more extreme environments—such as higher pressures, ultra-low cryogenic temperatures, and highly corrosive or volatile gas mixtures—manufacturers are forced to constantly escalate their research and development budgets. The metallurgical and aerodynamic barriers to developing cost-effective hydrogen and supercritical CO₂ compressors remain significant, requiring

ongoing, capital-intensive innovation to maintain competitive market positions. Finally, the growing complexity of international trade regulations and geopolitical friction can disrupt the highly globalized supply chains required to source the precision components necessary for these advanced machines.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Industrial Centrifugal Compressor Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Industrial Centrifugal Compressor by Region
- 8.2 Import of Industrial Centrifugal Compressor by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET IN NORTH AMERICA (2021-2031)

- 9.1 Industrial Centrifugal Compressor Market Size
- 9.2 Industrial Centrifugal Compressor Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET IN SOUTH AMERICA (2021-2031)

- 10.1 Industrial Centrifugal Compressor Market Size
- 10.2 Industrial Centrifugal Compressor Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET IN ASIA & PACIFIC (2021-2031)

- 11.1 Industrial Centrifugal Compressor Market Size
- 11.2 Industrial Centrifugal Compressor Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia & New Zealand

CHAPTER 12 HISTORICAL AND FORECAST INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET IN EUROPE (2021-2031)

- 12.1 Industrial Centrifugal Compressor Market Size
- 12.2 Industrial Centrifugal Compressor Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 North Europe

CHAPTER 13 HISTORICAL AND FORECAST INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET IN MEA (2021-2031)

- 13.1 Industrial Centrifugal Compressor Market Size
- 13.2 Industrial Centrifugal Compressor Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET (2021-2026)

- 14.1 Industrial Centrifugal Compressor Market Size
- 14.2 Industrial Centrifugal Compressor Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL INDUSTRIAL CENTRIFUGAL COMPRESSOR MARKET FORECAST (2026-2031)

- 15.1 Industrial Centrifugal Compressor Market Size Forecast
- 15.2 Industrial Centrifugal Compressor Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Everllence
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.1.3 SWOT Analysis of Everllence
 - 16.1.4 Everllence Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.2 Siemens Energy
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.2.3 SWOT Analysis of Siemens Energy
 - 16.2.4 Siemens Energy Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.3 Baker Hughes
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Industrial Centrifugal Compressor Information

- 16.3.3 SWOT Analysis of Baker Hughes
- 16.3.4 Baker Hughes Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.4 Chart Industries
 - 16.4.1 Company Profile
 - 16.4.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.4.3 SWOT Analysis of Chart Industries
 - 16.4.4 Chart Industries Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.5 Atlas Copco
 - 16.5.1 Company Profile
 - 16.5.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.5.3 SWOT Analysis of Atlas Copco
 - 16.5.4 Atlas Copco Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.6 Ingersoll Rand
 - 16.6.1 Company Profile
 - 16.6.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.6.3 SWOT Analysis of Ingersoll Rand
 - 16.6.4 Ingersoll Rand Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.7 Kobelco
 - 16.7.1 Company Profile
 - 16.7.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.7.3 SWOT Analysis of Kobelco
 - 16.7.4 Kobelco Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.8 Hyundai Heavy Industries Turbomachinery
 - 16.8.1 Company Profile
 - 16.8.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.8.3 SWOT Analysis of Hyundai Heavy Industries Turbomachinery
 - 16.8.4 Hyundai Heavy Industries Turbomachinery Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.9 Hitachi Industrial Products Ltd.
 - 16.9.1 Company Profile
 - 16.9.2 Main Business and Industrial Centrifugal Compressor Information
 - 16.9.3 SWOT Analysis of Hitachi Industrial Products Ltd.
 - 16.9.4 Hitachi Industrial Products Ltd. Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)

16.10 ShenGu Group

16.10.1 Company Profile

16.10.2 Main Business and Industrial Centrifugal Compressor Information

16.10.3 SWOT Analysis of ShenGu Group

16.10.4 ShenGu Group Industrial Centrifugal Compressor Sales, Revenue, Price and Gross Margin (2021-2026)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List

Table Research Scope of Industrial Centrifugal Compressor Report

Table Data Sources of Industrial Centrifugal Compressor Report

Table Major Assumptions of Industrial Centrifugal Compressor Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Industrial Centrifugal Compressor Picture

Table Industrial Centrifugal Compressor Classification

Table Industrial Centrifugal Compressor Applications List

Table Drivers of Industrial Centrifugal Compressor Market

Table Restraints of Industrial Centrifugal Compressor Market

Table Opportunities of Industrial Centrifugal Compressor Market

Table Threats of Industrial Centrifugal Compressor Market

Table Raw Materials Suppliers List

Table Different Production Methods of Industrial Centrifugal Compressor

Table Cost Structure Analysis of Industrial Centrifugal Compressor

Table Key End Users List

Table Latest News of Industrial Centrifugal Compressor Market

Table Merger and Acquisition List

Table Planned/Future Project of Industrial Centrifugal Compressor Market

Table Policy of Industrial Centrifugal Compressor Market

Table 2021-2031 Regional Export of Industrial Centrifugal Compressor

Table 2021-2031 Regional Import of Industrial Centrifugal Compressor

Table 2021-2031 Regional Trade Balance

Figure 2021-2031 Regional Trade Balance

Table 2021-2031 North America Industrial Centrifugal Compressor Market Size and Market Volume List

Figure 2021-2031 North America Industrial Centrifugal Compressor Market Size and CAGR

Figure 2021-2031 North America Industrial Centrifugal Compressor Market Volume and CAGR

Table 2021-2031 North America Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 North America Industrial Centrifugal Compressor Key Players Sales List

Table 2021-2026 North America Industrial Centrifugal Compressor Key Players Market Share List

Table 2021-2031 North America Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 North America Industrial Centrifugal Compressor Price List by Type

Table 2021-2031 United States Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 United States Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Canada Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Canada Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Mexico Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Mexico Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 South America Industrial Centrifugal Compressor Market Size and Market Volume List

Figure 2021-2031 South America Industrial Centrifugal Compressor Market Size and CAGR

Figure 2021-2031 South America Industrial Centrifugal Compressor Market Volume and CAGR

Table 2021-2031 South America Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 South America Industrial Centrifugal Compressor Key Players Sales List

Table 2021-2026 South America Industrial Centrifugal Compressor Key Players Market Share List

Table 2021-2031 South America Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 South America Industrial Centrifugal Compressor Price List by Type

Table 2021-2031 Brazil Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Brazil Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Argentina Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Argentina Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Chile Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Chile Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Peru Industrial Centrifugal Compressor Market Size and Market

Volume List

Table 2021-2031 Peru Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Asia & Pacific Industrial Centrifugal Compressor Market Size and Market Volume List

Figure 2021-2031 Asia & Pacific Industrial Centrifugal Compressor Market Size and CAGR

Figure 2021-2031 Asia & Pacific Industrial Centrifugal Compressor Market Volume and CAGR

Table 2021-2031 Asia & Pacific Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 Asia & Pacific Industrial Centrifugal Compressor Key Players Sales List

Table 2021-2026 Asia & Pacific Industrial Centrifugal Compressor Key Players Market Share List

Table 2021-2031 Asia & Pacific Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 Asia & Pacific Industrial Centrifugal Compressor Price List by Type

Table 2021-2031 China Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 China Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 India Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 India Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Japan Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Japan Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 South Korea Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 South Korea Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Southeast Asia Industrial Centrifugal Compressor Market Size List

Table 2021-2031 Southeast Asia Industrial Centrifugal Compressor Market Volume List

Table 2021-2031 Southeast Asia Industrial Centrifugal Compressor Import List

Table 2021-2031 Southeast Asia Industrial Centrifugal Compressor Export List

Table 2021-2031 Australia & New Zealand Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Australia & New Zealand Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Europe Industrial Centrifugal Compressor Market Size and Market Volume List

Figure 2021-2031 Europe Industrial Centrifugal Compressor Market Size and CAGR

Figure 2021-2031 Europe Industrial Centrifugal Compressor Market Volume and CAGR

Table 2021-2031 Europe Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 Europe Industrial Centrifugal Compressor Key Players Sales List

Table 2021-2026 Europe Industrial Centrifugal Compressor Key Players Market Share List

Table 2021-2031 Europe Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 Europe Industrial Centrifugal Compressor Price List by Type

Table 2021-2031 Germany Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Germany Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 France Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 France Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 United Kingdom Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 United Kingdom Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Italy Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Italy Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Spain Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Spain Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Belgium Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Belgium Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Netherlands Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Netherlands Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Austria Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Austria Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Poland Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Poland Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 North Europe Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 North Europe Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 MEA Industrial Centrifugal Compressor Market Size and Market

Volume List

Figure 2021-2031 MEA Industrial Centrifugal Compressor Market Size and CAGR

Figure 2021-2031 MEA Industrial Centrifugal Compressor Market Volume and CAGR

Table 2021-2031 MEA Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 MEA Industrial Centrifugal Compressor Key Players Sales List

Table 2021-2026 MEA Industrial Centrifugal Compressor Key Players Market Share List

Table 2021-2031 MEA Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 MEA Industrial Centrifugal Compressor Price List by Type

Table 2021-2031 Egypt Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Egypt Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Israel Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Israel Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 South Africa Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 South Africa Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Gulf Cooperation Council Countries Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Gulf Cooperation Council Countries Industrial Centrifugal Compressor Import & Export List

Table 2021-2031 Turkey Industrial Centrifugal Compressor Market Size and Market Volume List

Table 2021-2031 Turkey Industrial Centrifugal Compressor Import & Export List

Table 2021-2026 Global Industrial Centrifugal Compressor Market Size List by Region

Table 2021-2026 Global Industrial Centrifugal Compressor Market Size Share List by Region

Table 2021-2026 Global Industrial Centrifugal Compressor Market Volume List by Region

Table 2021-2026 Global Industrial Centrifugal Compressor Market Volume Share List by Region

Table 2021-2026 Global Industrial Centrifugal Compressor Demand List by Application

Table 2021-2026 Global Industrial Centrifugal Compressor Demand Market Share List by Application

Table 2021-2026 Global Industrial Centrifugal Compressor Key Vendors Sales List

Table 2021-2026 Global Industrial Centrifugal Compressor Key Vendors Sales Share List

Figure 2021-2026 Global Industrial Centrifugal Compressor Market Volume and Growth Rate

Table 2021-2026 Global Industrial Centrifugal Compressor Key Vendors Revenue List
Figure 2021-2026 Global Industrial Centrifugal Compressor Market Size and Growth Rate

Table 2021-2026 Global Industrial Centrifugal Compressor Key Vendors Revenue Share List

Table 2021-2026 Global Industrial Centrifugal Compressor Demand List by Type

Table 2021-2026 Global Industrial Centrifugal Compressor Demand Market Share List by Type

Table 2021-2026 Regional Industrial Centrifugal Compressor Price List

Table 2026-2031 Global Industrial Centrifugal Compressor Market Size List by Region

Table 2026-2031 Global Industrial Centrifugal Compressor Market Size Share List by Region

Table 2026-2031 Global Industrial Centrifugal Compressor Market Volume List by Region

Table 2026-2031 Global Industrial Centrifugal Compressor Market Volume Share List by Region

Table 2026-2031 Global Industrial Centrifugal Compressor Demand List by Application

Table 2026-2031 Global Industrial Centrifugal Compressor Demand Market Share List by Application

Table 2026-2031 Global Industrial Centrifugal Compressor Key Vendors Sales List

Table 2026-2031 Global Industrial Centrifugal Compressor Key Vendors Sales Share List

Figure 2026-2031 Global Industrial Centrifugal Compressor Market Volume and Growth Rate

Table 2026-2031 Global Industrial Centrifugal Compressor Key Vendors Revenue List

Figure 2026-2031 Global Industrial Centrifugal Compressor Market Size and Growth Rate

Table 2026-2031 Global Industrial Centrifugal Compressor Key Vendors Revenue Share List

Table 2026-2031 Global Industrial Centrifugal Compressor Demand List by Type

Table 2026-2031 Global Industrial Centrifugal Compressor Demand Market Share List by Type

Table 2026-2031 Industrial Centrifugal Compressor Regional Price List

Table Everllence Information

Table SWOT Analysis of Everllence

Table 2021-2026 Everllence Industrial Centrifugal Compressor Sale Volume Price Cost Revenue

Figure 2021-2026 Everllence Industrial Centrifugal Compressor Sale Volume and Growth Rate

Figure 2021-2026 Everllence Industrial Centrifugal Compressor Market Share
Table Siemens Energy Information
Table SWOT Analysis of Siemens Energy
Table 2021-2026 Siemens Energy Industrial Centrifugal Compressor Sale Volume Price
Cost Revenue
Figure 2021-2026 Siemens Energy Industrial Centrifugal Compressor Sale Volume and
Growth Rate
Figure 2021-2026 Siemens Energy Industrial Centrifugal Compressor Market Share
Table Baker Hughes Information
Table SWOT Analysis of Baker Hughes
Table 2021-2026 Baker Hughes Industrial Centrifugal Compressor Sale Volume Price
Cost Revenue
Figure 2021-2026 Baker Hughes Industrial Centrifugal Compressor Sale Volume and
Growth Rate
Figure 2021-2026 Baker Hughes Industrial Centrifugal Compressor Market Share
Table Chart Industries Information
Table SWOT Analysis of Chart Industries
Table 2021-2026 Chart Industries Industrial Centrifugal Compressor Sale Volume Price
Cost Revenue
Figure 2021-2026 Chart Industries Industrial Centrifugal Compressor Sale Volume and
Growth Rate
Figure 2021-2026 Chart Industries Industrial Centrifugal Compressor Market Share
Table Atlas Copco Information
Table SWOT Analysis of Atlas Copco
Table 2021-2026 Atlas Copco Industrial Centrifugal Compressor Sale Volume Price
Cost Revenue
Figure 2021-2026 Atlas Copco Industrial Centrifugal Compressor Sale Volume and
Growth Rate
Figure 2021-2026 Atlas Copco Industrial Centrifugal Compressor Market Share
Table Ingersoll Rand Information
Table SWOT Analysis of Ingersoll Rand
Table 2021-2026 Ingersoll Rand Industrial Centrifugal Compressor Sale Volume Price
Cost Revenue
Figure 2021-2026 Ingersoll Rand Industrial Centrifugal Compressor Sale Volume and
Growth Rate
Figure 2021-2026 Ingersoll Rand Industrial Centrifugal Compressor Market Share
Table Kobelco Information
Table SWOT Analysis of Kobelco
Table 2021-2026 Kobelco Industrial Centrifugal Compressor Sale Volume Price Cost

Revenue

Figure 2021-2026 Kobelco Industrial Centrifugal Compressor Sale Volume and Growth Rate

Figure 2021-2026 Kobelco Industrial Centrifugal Compressor Market Share

Table Hyundai Heavy Industries Turbomachinery Information

Table SWOT Analysis of Hyundai Heavy Industries Turbomachinery

Table 2021-2026 Hyundai Heavy Industries Turbomachinery Industrial Centrifugal Compressor Sale Volume Price Cost Revenue

Figure 2021-2026 Hyundai Heavy Industries Turbomachinery Industrial Centrifugal Compressor Sale Volume and Growth Rate

Figure 2021-2026 Hyundai Heavy Industries Turbomachinery Industrial Centrifugal Compressor Market Share

Table Hitachi Industrial Products Ltd. Information

Table SWOT Analysis of Hitachi Industrial Products Ltd.

Table 2021-2026 Hitachi Industrial Products Ltd. Industrial Centrifugal Compressor Sale Volume Price Cost Revenue

Figure 2021-2026 Hitachi Industrial Products Ltd. Industrial Centrifugal Compressor Sale Volume and Growth Rate

Figure 2021-2026 Hitachi Industrial Products Ltd. Industrial Centrifugal Compressor Market Share

Table ShenGu Group Information

Table SWOT Analysis of ShenGu Group

Table 2021-2026 ShenGu Group Industrial Centrifugal Compressor Sale Volume Price Cost Revenue

Figure 2021-2026 ShenGu Group Industrial Centrifugal Compressor Sale Volume and Growth Rate

Figure 2021-2026 ShenGu Group Industrial Centrifugal Compressor Market Share

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