

Gas Turbines Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Design Type (Heavy Duty and Aeroderivative), By Backing Material (Power Generation, Oil & Gas and Others), By Technology (Open Cycle and Combined Cycle), By Rated Capacity (1–40 MW, 40–120 MW, 120–300 MW and Above 300 MW), By Region, and By Competition 2018-2028

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Abstracts

Global Gas Turbines Market was valued at USD 15.68 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.17% through 2028. The global push to reduce carbon emissions and combat climate change is driving the adoption of gas turbines. Gas turbines, especially those using natural gas, produce lower emissions compared to some traditional forms of power generation, aligning with environmental regulations and sustainability goals.

Key Market Drivers

Increasing Demand for Power Generation Efficiency

The global gas turbines market is experiencing a significant boost due to the growing demand for enhanced power generation efficiency. As the world grapples with the challenges of a rapidly expanding population and urbanization, the need for reliable and efficient energy sources has become paramount. Gas turbines, known for their efficiency and versatility, have emerged as a key solution for power generation across various sectors.

One of the primary drivers behind the increasing demand for gas turbines is their ability to deliver high thermal efficiency in power plants. Gas turbines convert a significant portion of the fuel's energy into electricity, resulting in a more efficient and cleaner power generation process compared to traditional methods. This efficiency is particularly crucial in addressing the global push towards sustainable and environmentally friendly energy solutions. Governments and industries alike are increasingly recognizing the importance of adopting technologies that minimize environmental impact, making gas turbines a preferred choice for power generation.

Furthermore, advancements in gas turbine technology, such as combined cycle power plants, contribute to higher overall efficiency. These systems harness both gas and steam turbines to extract maximum energy from the fuel, providing a dual benefit of increased power output and reduced fuel consumption. The pursuit of improved energy efficiency and the desire to meet stringent environmental regulations are driving investments in research and development within the gas turbines market, ensuring a continuous evolution of more efficient and environmentally friendly technologies.

In summary, the increasing demand for power generation efficiency is a key driver propelling the growth of the global gas turbines market. As nations strive to meet rising energy needs while minimizing environmental impact, gas turbines offer a compelling solution with their ability to deliver higher thermal efficiency and contribute to sustainable power generation.

Growing Industrialization and Infrastructure Development

The global gas turbines market is witnessing substantial growth driven by the rapid pace of industrialization and infrastructure development across the globe. As emerging economies expand their manufacturing capabilities and established economies invest in upgrading existing infrastructure, the demand for reliable and efficient power generation solutions, such as gas turbines, has surged.

In the context of industrial applications, gas turbines play a pivotal role in providing a continuous and stable power supply for various processes. Industries such as petrochemicals, manufacturing, and oil and gas heavily rely on the consistent and high-energy output offered by gas turbines. The flexibility of gas turbines to operate in diverse conditions and their quick start-up capabilities make them well-suited for meeting the dynamic energy demands of industrial operations.

Moreover, the increasing need for decentralized power generation in remote or off-grid industrial locations further propels the demand for gas turbines. These turbines provide a reliable source of energy without the need for extensive grid infrastructure, making them ideal for supporting industrial facilities in diverse geographical settings.

In the realm of infrastructure development, gas turbines are a preferred choice for power generation in large-scale projects such as airports, hospitals, and commercial complexes. The ability of gas turbines to deliver high power output with relatively low emissions aligns with the sustainability goals of modern infrastructure projects. Governments and private entities investing in these developments see gas turbines as a reliable and efficient means of meeting the escalating energy demands associated with urbanization and infrastructure expansion.

In conclusion, the growing wave of industrialization and infrastructure development globally is a significant driver fueling the expansion of the gas turbines market. The adaptability and reliability of gas turbines make them indispensable for industries and projects seeking efficient power generation solutions.

Rising Focus on Renewable Energy Integration

A key driver influencing the global gas turbines market is the rising focus on integrating renewable energy sources into the power generation mix. While the world is transitioning towards a more sustainable energy future, the intermittent nature of renewable sources such as wind and solar presents challenges in maintaining a stable and consistent power supply. Gas turbines are emerging as a crucial component in addressing these challenges by providing flexible and reliable backup power.

As countries aim to increase the share of renewable energy in their overall energy portfolios, the need for effective energy storage and backup solutions becomes evident. Gas turbines, particularly those used in peaking power plants, offer a rapid response to fluctuations in renewable energy generation. They can quickly ramp up or down to compensate for variations in wind or solar power output, ensuring a stable grid and reliable electricity supply.

Another aspect driving the integration of gas turbines with renewable energy is the concept of hybrid power plants. These facilities combine the strengths of both renewable sources and gas turbines, creating a synergistic approach to power generation. Gas turbines can efficiently balance the intermittent nature of renewable energy, providing continuous power during periods of low renewable generation.

Furthermore, advancements in gas turbine technology, including enhanced combustion systems and improved operational flexibility, make them well-suited for integration with renewable energy sources. Governments and energy providers are increasingly recognizing the importance of a diversified and flexible energy mix, where gas turbines act as a crucial enabler for a smooth transition towards a sustainable and resilient power grid.

In summary, the rising focus on renewable energy integration is a significant driver propelling the growth of the global gas turbines market. Gas turbines' ability to complement and stabilize the fluctuations in renewable energy generation positions them as a key player in the ongoing global energy transition.

Key Market Challenges

Environmental Concerns and Emissions Control

One of the foremost challenges facing the global gas turbines market is the increasing scrutiny and concern regarding environmental impact and emissions control. While gas turbines are known for their efficiency, they still emit greenhouse gases and pollutants during the combustion process. The combustion of natural gas, a common fuel for gas turbines, releases carbon dioxide (CO₂), a major contributor to climate change.

As the global community intensifies its focus on mitigating climate change and reducing carbon footprints, the gas turbines industry faces the challenge of aligning with stringent environmental regulations. Governments worldwide are imposing stricter emissions standards, pushing manufacturers to develop gas turbines with lower emissions profiles. This necessitates significant investments in research and development to enhance combustion technologies, improve fuel efficiency, and implement advanced emissions control mechanisms.

The challenge is two-fold: not only must gas turbine manufacturers innovate to minimize emissions from their products, but end-users, particularly power plants and industrial facilities, must also invest in emissions control technologies to meet regulatory requirements. Balancing the need for reliable and efficient energy with environmental sustainability poses a complex challenge for the gas turbines market, requiring a collaborative effort across the industry to address and overcome.

In summary, environmental concerns and emissions control present a substantial

challenge for the global gas turbines market, requiring ongoing innovation and investment to develop cleaner and more sustainable technologies.

Intermittency and Grid Integration with Renewables

The increasing integration of renewable energy sources, such as wind and solar, into the power grid poses a significant challenge for the global gas turbines market. Unlike traditional baseload power plants, renewable sources are intermittent, varying with weather conditions and time of day. Gas turbines, often used for peaking power or backup generation, face the challenge of efficiently integrating with these intermittent energy sources to ensure grid stability.

The challenge lies in the need for gas turbines to respond rapidly to fluctuations in renewable energy output, providing backup power when renewable sources are unable to meet demand. While gas turbines excel at flexibility and quick start-ups, achieving seamless integration with variable renewable energy poses technical and operational challenges. Advanced control systems and grid management technologies must be implemented to coordinate the dynamic interaction between gas turbines and renewables, ensuring a reliable power supply under varying conditions.

Moreover, as the share of renewables in the energy mix continues to grow, gas turbines must adapt to operate in hybrid power plants that combine renewable sources with gas-fired generation. This requires a comprehensive understanding of the technical, regulatory, and economic aspects of hybrid systems, presenting a complex challenge for both gas turbine manufacturers and energy planners.

In conclusion, addressing the intermittency and enhancing grid integration with renewable energy sources is a key challenge for the global gas turbines market, necessitating collaborative efforts to develop innovative solutions and foster a more resilient energy infrastructure.

Competition from Alternative Technologies

The global gas turbines market faces a formidable challenge from the rise of alternative technologies and energy sources. With the ongoing advancements in energy storage, fuel cells, and renewable energy technologies, the landscape of power generation is evolving rapidly. These alternatives present a compelling case for cleaner, more sustainable, and decentralized energy solutions, posing a competitive threat to traditional gas turbines.

Energy storage technologies, such as batteries, are becoming increasingly efficient and cost-effective, offering a means to store excess energy from renewable sources for later use. This reduces the reliance on gas turbines for peaking power and backup generation, as stored energy can be deployed when needed without the need for combustion-based systems.

Additionally, advancements in fuel cell technology, especially in hydrogen fuel cells, present an alternative avenue for power generation with minimal emissions. As the world explores hydrogen as a clean energy carrier, gas turbines may face competition in applications where fuel cells prove to be a viable and environmentally friendly option.

To remain competitive, the gas turbines market must navigate these challenges by continuing to innovate and adapt to changing market dynamics. This includes exploring synergies with alternative technologies, such as hybrid power systems, and addressing the evolving preferences of consumers and industries seeking sustainable and cost-effective energy solutions.

In summary, the competition from alternative technologies poses a significant challenge for the global gas turbines market, necessitating continuous innovation and strategic adaptation to stay relevant in a rapidly transforming energy landscape.

Key Market Trends

Transition Towards Hydrogen as a Clean Fuel

A prominent trend in the global gas turbines market is the accelerating shift towards using hydrogen as a clean and sustainable fuel. As the world intensifies its efforts to reduce carbon emissions and combat climate change, hydrogen has emerged as a promising alternative to traditional hydrocarbon fuels. Gas turbines, known for their adaptability to different fuels, are at the forefront of this transition, with manufacturers and operators exploring the integration of hydrogen into gas turbine systems.

Hydrogen offers the advantage of being a clean-burning fuel, producing only water vapor when combusted. This aligns with global efforts to decarbonize industries and power generation, making hydrogen a key player in the transition to a low-carbon economy. Gas turbines can be retrofitted or designed to run on hydrogen, leveraging existing infrastructure and expertise in gas turbine technology.

One of the driving factors behind the hydrogen trend in the gas turbines market is the increasing availability of green hydrogen, produced through electrolysis powered by renewable energy sources. Green hydrogen addresses the environmental concerns associated with traditional hydrogen production methods, which often rely on fossil fuels. Gas turbines running on green hydrogen contribute to a more sustainable and environmentally friendly energy ecosystem, supporting the goals of countries and industries aiming for carbon neutrality.

As the hydrogen economy continues to gain momentum, the gas turbines market is witnessing a trend of research and development focused on optimizing combustion processes, enhancing turbine materials, and addressing technical challenges associated with hydrogen combustion. This trend reflects the industry's commitment to aligning with global sustainability goals and embracing cleaner energy sources.

In conclusion, the transition towards hydrogen as a clean fuel represents a significant trend in the global gas turbines market, with implications for both environmental sustainability and the long-term viability of gas turbine technology in a rapidly evolving energy landscape.

Digitalization and Industry 4.0 Integration

The global gas turbines market is experiencing a transformative trend driven by the increasing integration of digitalization and Industry 4.0 technologies. As industries worldwide embrace the era of digital transformation, gas turbine manufacturers and operators are leveraging advanced technologies to enhance efficiency, reliability, and overall performance.

One key aspect of this trend is the adoption of smart sensors, data analytics, and real-time monitoring systems in gas turbine operations. These technologies enable continuous monitoring of turbine health, performance optimization, and predictive maintenance. By collecting and analyzing data in real-time, operators can detect potential issues before they escalate, reducing downtime and enhancing the overall reliability of gas turbine systems.

The implementation of digital twin technology is another significant aspect of this trend. Digital twins create virtual replicas of physical gas turbines, allowing for in-depth simulations, performance analysis, and scenario testing. This capability enhances the design and engineering processes, accelerates product development, and facilitates better decision-making throughout the entire lifecycle of gas turbines.

Furthermore, the trend towards Industry 4.0 integration extends beyond individual turbines to the creation of interconnected and intelligent power plants. Integrating gas turbines with advanced control systems, artificial intelligence, and communication technologies enables the seamless coordination of power generation, distribution, and consumption. This interconnected approach optimizes the overall efficiency of power generation facilities and supports the integration of renewable energy sources into the grid.

In conclusion, the trend towards digitalization and Industry 4.0 integration is reshaping the global gas turbines market, ushering in an era of smarter, more efficient, and interconnected power generation. This trend not only improves the performance and reliability of gas turbines but also positions them as essential components in the evolving landscape of intelligent and sustainable energy systems.

Segmental Insights

Backing Material Insights

The Power Generation segment emerged as the dominating segment in 2022. The global gas turbines market for power generation is segmented based on capacity ranges, spanning from small-scale distributed generation to large utility-scale power plants. Different capacity segments cater to various applications, with smaller turbines often employed for decentralized power generation and larger turbines for utility-scale projects.

Combined Cycle Power Plants: The adoption of combined cycle power plants, where gas turbines are integrated with steam turbines for increased efficiency, continues to be a significant trend in the power generation segment. This configuration allows for the utilization of exhaust heat to generate additional electricity, enhancing overall plant efficiency. **Advanced Combustion Technologies:** Gas turbine manufacturers are investing in research and development to improve combustion technologies, aiming for higher efficiency, lower emissions, and better fuel flexibility. Innovations in combustion systems contribute to the environmental sustainability of gas turbines.

Gas turbines play a crucial role in supporting the integration of renewable energy sources into the power grid. They provide fast-start capabilities and flexible operation, compensating for the intermittency of renewable sources like wind and solar. Gas turbines are often used for peaking power and grid stabilization, ensuring a reliable

power supply during periods of low renewable energy generation.

Rated Capacity Insights

The Above 300 MW segment is projected to experience rapid growth during the forecast period. The above 300 MW segment in the global gas turbines market is typically associated with large-scale power generation projects, such as utility-scale power plants and industrial applications with significant energy requirements. The demand for gas turbines in this segment is often driven by the need for high-capacity, reliable, and efficient power generation. Industries like petrochemicals, refining, and large-scale manufacturing facilities may prefer gas turbines in this power range to meet their substantial energy demands.

In the above 300 MW segment, efficiency becomes a critical factor. High-capacity gas turbines are expected to operate with optimal efficiency to maximize power output while minimizing fuel consumption and emissions. Manufacturers in this segment focus on advanced technologies, such as combined cycle configurations, to enhance overall efficiency and reduce environmental impact. As environmental regulations become more stringent, the development of gas turbines that meet or exceed emission standards is a key consideration.

The market for gas turbines above 300 MW is likely to witness ongoing technological advancements. This includes innovations in materials, combustion systems, and turbine design to improve performance, reliability, and operational flexibility. Research and development efforts are expected to focus on achieving higher efficiency levels, faster start-up times, and increased operational resilience in response to the evolving needs of large-scale power generation projects.

Regional Insights

Asia Pacific emerged as the dominating region in 2022, holding the largest market share. Gas turbines in the Asia Pacific region find applications across various sectors, including power generation, oil and gas, aviation, and industrial manufacturing. The versatility of gas turbines makes them suitable for diverse environments, from powering large utility plants to serving as backup generators for critical facilities.

Governments in the Asia Pacific region are increasingly focused on sustainable and cleaner energy solutions to address environmental concerns. Gas turbines are adapting to this trend by incorporating technologies for lower emissions, fuel flexibility, and the

integration of alternative fuels. The transition to cleaner energy sources, including natural gas and, in the future, potentially hydrogen, is influencing the gas turbines market in the region.

The region is witnessing significant investments in infrastructure development, including the construction of new power plants, airports, and industrial facilities. Gas turbines are often chosen for their reliability and ability to provide large-scale power generation quickly. Projects such as combined cycle power plants contribute to enhancing overall energy efficiency in the Asia Pacific region.

Gas turbine manufacturers in the Asia Pacific are investing in research and development to incorporate advanced technologies into their products. This includes improvements in combustion systems, materials, and digitalization. The adoption of digital twin technology and smart solutions for monitoring and maintenance is becoming more prevalent in the region, contributing to operational efficiency.

The availability and accessibility of natural gas infrastructure play a significant role in the adoption of gas turbines. Countries in the Asia Pacific region with well-established natural gas infrastructure tend to favor gas turbines for power generation. The energy mix, including the share of natural gas in the overall power generation portfolio, varies among countries, influencing the demand for gas turbines.

Geopolitical and economic factors influence the gas turbines market in the Asia Pacific region. Trade relationships, geopolitical stability, and economic growth impact the investment climate for energy projects. Countries with stable political environments and robust economic growth are more likely to witness increased investments in gas turbine-based power generation.

Key Market Players

Kawasaki Heavy Industries, Ltd.

Siemens Energy

Capstone Green Energy Corporation

General Electric

Ansaldo Energia

Mitsubishi Heavy Industries, Ltd.

United Engine Corporation

Rolls-Royce plc

Harbin Electric Machinery Company Limited

OPRA Turbines

Report Scope:

In this report, the Global Gas Turbines Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Gas Turbines Market, By Design Type:

Heavy Duty

Aeroderivative Duty

Gas Turbines Market, By Backing Material:

Power Generation

Oil & Gas

Others

Gas Turbines Market, By Technology:

Open Cycle

Combined Cycle

Gas Turbines Market, By Rated Capacity:

1–40 MW

40–120 MW

120–300 MW

Above 300 MW

Gas Turbines Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Netherlands

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Thailand

Malaysia

South America

Brazil

Argentina

Colombia

Chile

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Gas Turbines Market.

Available Customizations:

Global Gas Turbines Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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