

# **Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Application (Turbine Controls and Compressor Controls), By End-user Industry (Power, Oil and Gas, Chemicals, Metals and Mining, Others), By Service Type (New Turbo-machinery Control System, Retrofit Turbo-machinery Control System and Ancillary System), By Region, By Competition**

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## **Abstracts**

Global Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market has valued at USD 2.57 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.09% through 2028.

The Turbomachinery Control Systems, Retrofitting, and Ancillary Services market refer to a dynamic and multifaceted sector within the industrial and energy industries. This market encompasses a range of products and services dedicated to the optimization, maintenance, and enhancement of turbomachinery systems, which include turbines, compressors, and related equipment.

**Turbomachinery Control Systems:** This segment involves the design, development, and production of advanced control systems that regulate the operation of turbomachinery. These systems encompass automation, monitoring, data analytics, and safety features, allowing for precise control, efficiency, and reliability in various industrial applications.

**Retrofitting Services:** Retrofitting services entail the modification or upgrade of existing

turbomachinery equipment with modern control systems and technologies. This process aims to enhance the performance, energy efficiency, and lifespan of aging turbomachinery, aligning them with contemporary industry standards and environmental regulations.

**Ancillary Services:** Ancillary services encompass a broad array of support offerings related to turbomachinery control systems and retrofitting. This includes maintenance, technical support, spare parts provisioning, training, and consultancy services. Ancillary services ensure the seamless operation, reliability, and longevity of turbomachinery systems, reducing downtime and optimizing overall industrial processes.

The Turbomachinery Control Systems, Retrofitting, and Ancillary Services market is essential for diverse sectors such as power generation, oil and gas, petrochemicals, aviation, and manufacturing, where turbomachinery plays a pivotal role. This market thrives on innovation, technological advancements, regulatory compliance, and the growing demand for energy-efficient and sustainable industrial solutions. It addresses the critical need for optimizing turbomachinery performance, reducing operational costs, and ensuring the safety and reliability of industrial processes across the globe.

## Key Market Drivers

### Increasing Energy Demand and Infrastructure Development

The global Turbomachinery Control Systems, Retrofitting, and Ancillary Services market are significantly influenced by the ever-increasing demand for energy worldwide, coupled with extensive infrastructure development initiatives across various industries. As economies expand and populations grow, the requirement for energy continues to surge. This surge, in turn, escalates the demand for turbomachinery, which includes turbines and compressors, playing a pivotal role in sectors such as power generation, oil and gas, and petrochemicals. Infrastructure development projects, ranging from the construction of power plants to industrial facilities, require advanced turbomachinery control systems to ensure efficient operation. Turbomachinery plays a vital role in these infrastructural developments, making the market for control systems, retrofitting, and ancillary services an essential component of global energy expansion efforts.

### Focus on Energy Efficiency and Sustainability

In today's world, the global emphasis on environmental sustainability and energy efficiency has become increasingly pronounced. This focus on sustainability is a key

driver for the Turbomachinery Control Systems market. Turbomachinery, including turbines and compressors, often consumes substantial amounts of energy in various industrial applications. To address climate change concerns and reduce carbon footprints, industries are actively seeking energy-efficient technologies. Modern turbomachinery control systems are designed to optimize processes, reduce energy consumption, and minimize harmful emissions. Retrofitting existing equipment with advanced control systems can significantly enhance their energy efficiency and sustainability, aligning with the global commitment to reducing environmental impact while maintaining high operational efficiency.

### Aging Turbomachinery Infrastructure

Many industrial facilities worldwide rely on aging turbomachinery equipment. Over time, these machines may become outdated and less efficient due to advancements in control system technology. This aging infrastructure presents a significant driver for the Turbomachinery Control Systems, Retrofitting, and Ancillary Services market. The retrofitting and upgrading of older turbomachinery systems with the latest control technology can extend their operational lifespan and improve overall performance. This is particularly critical for industries where replacing entire systems may be cost-prohibitive. Thus, the demand for ancillary services related to retrofitting and modernizing existing infrastructure remains robust, further fueling the market's growth.

### Technological Advancements

Continual technological advancements are a cornerstone of the Turbomachinery Control Systems market's growth. The development of innovative control system technologies, such as automation, remote monitoring, and predictive maintenance, has transformed how turbomachinery operates in industrial settings. Modern control systems enable real-time monitoring, data analytics, and predictive maintenance capabilities. These advancements empower operators to optimize turbomachinery performance, reduce downtime, and enhance overall operational efficiency. The allure of staying at the cutting edge of technology motivates end-users to invest in these advanced control systems, making technological innovation a significant driver of market growth.

### Expansion of the Oil and Gas Industry

The oil and gas industry remains a dominant consumer of turbomachinery equipment, and its continued expansion plays a pivotal role in driving the Turbomachinery Control

Systems, Retrofitting, and Ancillary Services market. As the global demand for oil and gas persists, exploration and production activities continue unabated. This includes unconventional resources like shale oil and gas, which often require specialized turbomachinery. Moreover, the transportation and storage of natural gas, including compression and liquefaction processes, rely heavily on turbomachinery. Consequently, the growing oil and gas sector fuels the demand for efficient turbomachinery control systems, retrofitting services, and ancillary solutions, thereby bolstering the market's expansion.

### Increasing Focus on Reliability and Safety

Safety and reliability are paramount considerations in industries where turbomachinery operates, such as refining, petrochemicals, and power generation. The reliability of these systems is not only vital for continuous operations but also to prevent catastrophic failures that can have severe consequences. Turbomachinery control systems play a critical role in ensuring safe operations and enhancing reliability. By providing real-time monitoring, fault detection, and emergency shutdown capabilities, these systems contribute significantly to industrial safety standards. The increasing emphasis on safety and reliability in industrial settings drives the demand for advanced control systems and retrofitting services that enhance the integrity and performance of turbomachinery, further underscoring their importance in the market.

### Government Policies are Likely to Propel the Market

#### Energy Efficiency Standards and Incentives

Energy efficiency policies are instrumental in shaping the global Turbomachinery Control Systems, Retrofitting, and Ancillary Services market. Governments can establish stringent energy efficiency standards for industrial equipment, including turbomachinery control systems. These standards would require manufacturers to produce more efficient control systems, reducing energy consumption and emissions. To incentivize compliance with these standards and promote the adoption of advanced control technology, governments can offer financial incentives and tax credits to businesses that invest in energy-efficient retrofitting and control systems. Such policies encourage industrial facilities to upgrade their existing turbomachinery infrastructure with modern, eco-friendly control systems, fostering growth in the market. Moreover, governments can establish certification programs to verify the energy efficiency of control systems, providing transparency and assurance to buyers, further driving demand for compliant products and services.

## Research and Development Grants

Governments can play a pivotal role in advancing technology within the Turbomachinery Control Systems market through research and development (R&D) grants. By providing funding to both public and private sector entities engaged in developing cutting-edge control systems and retrofitting solutions, governments can accelerate innovation in the industry. These grants can support projects aimed at enhancing the performance, safety, and environmental sustainability of turbomachinery control systems. Funding R&D initiatives can lead to breakthroughs in automation, remote monitoring, predictive maintenance, and other advanced technologies that benefit the market. Governments may also collaborate with research institutions, industry associations, and businesses to create a robust ecosystem for R&D, driving not only market growth but also the emergence of global leaders in control system technology.

## Environmental Regulations and Emissions Control

Environmental policies and regulations can have a profound impact on the Turbomachinery Control Systems market. Governments can enact stringent emissions control measures, requiring industrial facilities to reduce their carbon footprint. This necessitates the adoption of cleaner technologies, including advanced control systems for turbomachinery. To enforce these regulations, governments can establish emissions trading schemes, carbon pricing mechanisms, and penalties for non-compliance. These measures create a strong economic incentive for industries to invest in control systems that minimize emissions, driving demand for retrofitting and ancillary services in the market. Additionally, governments can promote the development of control systems that facilitate emissions monitoring and reporting, ensuring transparency and accountability within industrial sectors.

## Export Promotion and Trade Policies

Governments can facilitate the global expansion of the Turbomachinery Control Systems, Retrofitting, and Ancillary Services market by implementing export promotion and trade policies. These policies can include trade agreements, export incentives, and support for international market access. Trade agreements that reduce trade barriers and tariffs can help control system manufacturers access new markets more easily. Export incentives such as financial support for marketing and export training can aid businesses in penetrating foreign markets and competing effectively. Furthermore, governments can establish export financing programs to assist control system

manufacturers in securing financing for international sales. These policies promote market growth by allowing businesses to expand their reach and capitalize on global demand.

### Infrastructure Investment and Public-Private Partnerships

Governments can stimulate the Turbomachinery Control Systems market by investing in infrastructure development and promoting public-private partnerships (PPPs). Infrastructure projects, including power generation facilities, petrochemical plants, and industrial complexes, rely on turbomachinery control systems. Through PPPs, governments can collaborate with private sector companies to finance and implement large-scale infrastructure projects. This not only boosts demand for control systems but also encourages the integration of advanced technologies into these projects. To further incentivize PPPs, governments can offer tax breaks, grants, and guarantees to private sector partners. Such policies attract private investment, foster innovation, and promote the growth of the Turbomachinery Control Systems market.

### Cybersecurity and Data Protection Regulations

In an increasingly digitized world, governments can enact cybersecurity and data protection regulations that impact the Turbomachinery Control Systems market. As control systems become more connected and data-driven, governments can impose strict cybersecurity requirements on manufacturers and operators. These regulations can mandate the implementation of robust cybersecurity measures to protect control systems from cyber threats. Compliance can involve regular security audits, penetration testing, and the use of encryption technologies. To encourage compliance, governments can establish penalties for data breaches and cyberattacks. This motivates businesses to invest in secure control systems and ancillary services that safeguard critical infrastructure. Moreover, governments can promote industry collaboration on cybersecurity best practices and standards, fostering a culture of cybersecurity readiness within the Turbomachinery Control Systems market.

In conclusion, government policies have a significant impact on the global Turbomachinery Control Systems, Retrofitting, and Ancillary Services market. Policies related to energy efficiency, R&D grants, environmental regulations, export promotion, infrastructure investment, public-private partnerships, and cybersecurity can shape the industry's growth and development, influencing market dynamics and the adoption of advanced technologies.

## Key Market Challenges

### Technological Complexity and Integration Challenges

The Turbomachinery Control Systems, Retrofitting, and Ancillary Services market face a formidable challenge in dealing with the increasing technological complexity of control systems and the integration hurdles that come with it. While technological advancements offer numerous benefits, they also introduce complexities that can be daunting for manufacturers, service providers, and end-users alike.

#### Technological Complexity:

Turbomachinery control systems have evolved significantly over the years. They now incorporate advanced features such as automation, remote monitoring, predictive maintenance, and real-time data analytics. While these capabilities enhance performance and efficiency, they also demand a higher level of technical expertise for design, manufacturing, installation, and maintenance. Moreover, control systems must meet stringent safety and environmental standards, further complicating their design and integration. Achieving this level of complexity often requires specialized skills and resources, leading to increased development costs.

#### Integration Challenges:

One of the most significant challenges in the Turbomachinery Control Systems market is integrating advanced control systems into existing infrastructure seamlessly. Many industrial facilities operate aging turbomachinery equipment that may not be inherently compatible with modern control technology. Retrofitting these systems with new controls often involves intricate engineering solutions and can lead to operational disruptions. Additionally, interoperability with other systems within an industrial facility, such as data management platforms and enterprise resource planning (ERP) systems, can pose integration challenges. Achieving a holistic and efficient data flow between control systems and these other components is essential for optimizing operations and achieving the desired outcomes.

#### Addressing the Challenges:

To overcome these challenges, the industry must invest in research and development efforts focused on simplifying control system design, making them more user-friendly, and streamlining integration processes. Collaboration between control system

manufacturers, engineering firms, and end-users can lead to standardized solutions that reduce complexity and enhance interoperability. Training and education programs are also crucial to equip the workforce with the necessary skills to navigate the complexities of modern control systems effectively. Governments and industry associations can play a role in facilitating these programs and providing incentives for continuous learning and skill development. Furthermore, the use of simulation and virtualization technologies can help mitigate integration risks by allowing for thorough testing and validation of control system designs before implementation. This approach minimizes operational disruptions and reduces the cost of addressing compatibility issues.

In summary, the technological complexity of modern Turbomachinery Control Systems and the challenges related to their integration into existing infrastructure are significant hurdles for the industry. However, with concerted efforts in research, development, training, and collaboration, these challenges can be effectively addressed, ensuring that the market continues to evolve and provide efficient, sustainable, and reliable solutions for various industrial applications.

### Regulatory Compliance and Environmental Sustainability

The Turbomachinery Control Systems, Retrofitting, and Ancillary Services market face ongoing challenges related to regulatory compliance and the imperative to promote environmental sustainability. While these challenges are vital for the long-term health of the industry and the planet, they also introduce complexities and costs that must be navigated effectively.

#### Regulatory Compliance:

Governments worldwide have introduced stringent regulations aimed at enhancing safety, emissions control, and operational standards across various industries that use turbomachinery. These regulations, which often evolve over time, require manufacturers and end-users to adhere to strict compliance standards. Meeting these compliance requirements can be challenging due to the diversity of industries and applications using turbomachinery. Different sectors may have unique regulatory frameworks and standards, necessitating adaptable control system designs that can accommodate various compliance needs.

#### Environmental Sustainability:

Growing concerns about climate change and environmental sustainability have led to



increased scrutiny of industrial operations, including those that rely on turbomachinery. Businesses are under pressure to reduce their carbon footprints, minimize emissions, and adopt more eco-friendly technologies. While modern control systems can contribute to energy efficiency and emissions reduction, the retrofitting of existing equipment with these systems can be capital-intensive. Additionally, the transition to cleaner energy sources often involves substantial upfront costs.

#### Addressing the Challenges:

To navigate the challenges of regulatory compliance and environmental sustainability, the Turbomachinery Control Systems market must take a proactive approach. This includes:

**Continuous Regulatory Monitoring:** Manufacturers and service providers must stay updated on evolving regulations in the industries they serve. This proactive approach allows for the development of control systems that align with current and future compliance requirements.

**Flexible Design Solutions:** Control system manufacturers should design products that can be customized to meet various regulatory needs. This flexibility ensures that control systems can adapt to the specific requirements of different industrial sectors.

**Investment in Green Technologies:** The industry should invest in research and development to create more energy-efficient and environmentally friendly control systems. Governments and industry associations can provide incentives and funding for eco-friendly technology development.

**Lifecycle Analysis:** Businesses should conduct lifecycle assessments to evaluate the environmental impact of retrofitting turbomachinery with advanced control systems. This analysis can help justify the upfront costs by highlighting long-term environmental and financial benefits.

**Collaboration and Knowledge Sharing:** Industry associations and governments can facilitate collaboration and knowledge sharing among stakeholders to develop best practices for compliance and sustainability. This collective effort can streamline efforts to meet regulatory requirements and reduce the industry's environmental footprint.

In conclusion, the challenges of regulatory compliance and environmental sustainability in the Turbomachinery Control Systems, Retrofitting, and Ancillary Services market are

complex but essential to address. By staying informed, adopting flexible solutions, investing in green technologies, conducting lifecycle analyses, and fostering collaboration, the industry can meet these challenges while contributing to a more sustainable and compliant future for turbomachinery applications across various sectors.

## Segmental Insights

### Oil & Gas Insights

The oil & gas segment had the largest market share in 2022 & expected to maintain it in the forecast period. The oil and gas sector heavily relies on turbomachinery, including compressors, turbines, and pumps, for various critical processes such as extraction, transportation, refining, and distribution. These turbomachines require precise control systems to ensure safe and efficient operation. Many oil and gas facilities worldwide operate with aging turbomachinery equipment that requires modernization. Retrofitting these systems with advanced control technology is a cost-effective way to extend their operational lifespan and improve efficiency while complying with stringent industry standards. Oil and gas operations are often complex and demand precise control and monitoring to ensure safety, reliability, and optimal performance. Turbomachinery control systems play a crucial role in managing these operations, including gas compression, gas liquefaction, and power generation. The oil and gas industry is under pressure to reduce energy consumption and greenhouse gas emissions. Advanced turbomachinery control systems contribute significantly to improving energy efficiency and minimizing environmental impacts, making them a top choice for the sector. The oil and gas industry is subject to rigorous safety regulations due to the potentially hazardous nature of its operations. Turbomachinery control systems are essential for maintaining safe operations and adhering to safety standards. The oil and gas sector represents substantial investments in infrastructure. Companies in this industry are more inclined to invest in cutting-edge control systems, retrofitting, and ancillary services to protect their significant capital investments and ensure operational excellence. The global demand for oil and gas remains high, with these resources continuing to be primary energy sources for transportation, heating, and electricity generation. This sustained demand fuels investments in oil and gas infrastructure, including turbomachinery control systems. The oil and gas industry has been at the forefront of technological innovation, including the development of advanced control systems, remote monitoring, and predictive maintenance solutions for turbomachinery. These innovations drive the growth of the Turbomachinery Control Systems market.

## Compressor Controls Insights

The Compressor Controls segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Compressors are versatile and find application in a wide array of industries, including oil and gas, petrochemicals, chemicals, manufacturing, and even HVAC (heating, ventilation, and air conditioning). This broad industrial presence ensures a consistent demand for compressor control systems, making them a staple in the Turbomachinery Control Systems market. Compressors are fundamental to energy-related processes, especially in the oil and gas sector. They are used for gas compression, which is crucial for transporting natural gas through pipelines, gas storage, and liquefied natural gas (LNG) production. The energy sector's substantial investments and continuous operations drive the demand for robust compressor controls. Efficiency is a paramount concern in today's industrial landscape. Compressor control systems play a pivotal role in optimizing energy efficiency by regulating and fine-tuning the compression process. With the growing emphasis on reducing energy consumption and minimizing environmental impact, industries seek advanced compressor controls to achieve these goals. The petrochemical and chemical industries rely heavily on compressors for a variety of applications, including gas separation, petrochemical refining, and chemical processing. These sectors prioritize the safety, reliability, and efficiency of their operations, necessitating sophisticated control systems. Compressors come in various types, such as centrifugal, reciprocating, and rotary screw compressors, each with specific control requirements. This diversity in compressor types contributes to a robust market for compressor control systems, as each type demands specialized control solutions. Stringent regulatory requirements in industries like oil and gas and chemicals necessitate advanced control systems to meet safety and environmental standards. Compressor controls are vital for ensuring compliance with these regulations, which is a top priority for many companies. The expansion of industrial infrastructure, particularly in emerging economies, leads to the installation of new compressors and the retrofitting of older equipment. As industries expand and modernize, there is a continuous demand for compressor control systems and retrofitting services. The global demand for energy, including natural gas, remains high. Compressors play a critical role in meeting this demand by facilitating the transportation and storage of energy resources. Consequently, the demand for compressor controls is closely tied to global energy consumption trends.

## Regional Insights

Asia-Pacific is expected to be the fastest-growing market during the forecast period. This is due to the increasing demand for energy in the region, as well as the growing focus on energy efficiency and emission reduction. China, India, and Japan are the major drivers of the market in this region.

North America is another major market for turbomachinery control systems, retrofitting, and ancillary services. The United States is the largest market in this region, followed by Canada. The growth of the market in this region is driven by the increasing demand for energy efficiency and emission reduction in the power generation and oil and gas industries.

Europe is the third-largest market for turbomachinery control systems, retrofitting, and ancillary services. Germany, France, and the United Kingdom are the major markets in this region. The growth of the market in this region is driven by the increasing demand for energy efficiency and emission reduction in the power generation, oil and gas, and chemical industries.

### Key Market Players

ABB Ltd

Siemens Energy AG

Rockwell Automation Inc.

Emerson Electric Co.

General Electric Company

Schneider Electric SE

Honeywell International Inc.

Metso Outotec Oyj

Proserv plc

Flowserve Corporation

## Report Scope:

In this report, the Global Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market,  
By Application:

Turbine Controls

Compressor Controls

Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market,  
By End-user Industry:

Power

Oil and Gas

Chemicals

Metals and Mining

Others

Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market,  
By Service Type:

New Turbo-machinery Control System

Retrofit Turbo-machinery Control System

Ancillary System

Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market,  
By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Turbomachinery Control Systems, Retrofitting, and Ancillary Services Market.

### Available Customizations:

Global Turbomachinery Control Systems, Retrofitting, and Ancillary Services 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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