



IHS Markit™

Prime Movers Research Package

Advance your competitive position by leveraging
IHS Markit's critical insight on the changing prime
mover markets

As prime mover technology advances, manufacturers must balance between the need to increase efficiency while managing costs to remain profitable. This along with heavy government legislation continues to drive the changes we see within the prime mover markets. This multi-database prime mover research package with commentary offers unparalleled coverage of existing and emerging technologies and geographic regions, enabling executives to make better business decisions and maximize growth opportunities.

Five databases are offered for individual or joint purchase:

- Gas Turbines
- Steam Turbines
- Hydro Turbines
- Gas Engines
- Turboexpanders

Each database in the research package provides an in-depth view into market sizing, market shares and forecasts with online data access.

BENEFITS	TIMELINE FOR DELIVERY
<ul style="list-style-type: none"> • Comprehensive market statistics by major region and country • Competitive world and regional market shares • In-depth analysis of various prime mover types and technologies • High number of technical segmentations for each prime mover type • Insight on the impact of product developments, government legislation, and economic climate 	<p>July 2015: Turboexpanders</p> <p>February 2017: Gas Turbines, Steam Turbines, Hydro Turbines</p> <p>April 2017: Gas Engines</p> <p>Deliverables for each database include: Excel based data sets, PDF trends analysis and access to analyst.</p>

MARKET SEGMENTATIONS

Gas Turbines Database

POWER RATING		FUEL TYPE	APPLICATION	FREQUENCY
1 – 10 MW	>80 – 120 MW	Natural Gas	Mechanical Drive	50 Hz
>10 – 20 MW	>120 – 160 MW	Liquefied Natural Gas (LNG)	Power Generation	60 Hz
>20 – 35 MW	>160 – 400 MW	Heavy Fuel Oil (HFO)	- Single Cycle	
>35 – 50 MW	>400 MW	Other Fuels	- Combined Cycle	
>50 – 80 MW				

EMEA		AMERICAS	APAC
Africa	Middle East	Brazil	China
Austria & Switzerland	Nordic Countries	Canada	India
Benelux	Poland	Mexico	Japan
Central & Eastern Europe	Russian Fed. & CIS	United States	Oceania
France	Spain & Portugal	Rest of Latin America	South Korea
Germany	Turkey		Rest of Asia
Italy	UK & Ireland		

INDUSTRY SECTOR	SALES CHANNEL
Marine	Direct to End-User
Oil & Gas	Direct to EPC
- Oil & Gas: Upstream	Direct to OEM
- Oil & Gas: Midstream	Direct to Systems Integrator
- Oil & Gas: Downstream	
Power	
Other Industries	

MARKET SEGMENTATIONS

Steam Turbines Database

POWER RATING		FUEL TYPE		DESIGN
1 – 10 MW	>80 – 120 MW	Fossil Fuels	Renewable	Subcritical
>10 – 20 MW	>120 – 160 MW	- Gas	- Biomass	Supercritical
>20 – 35 MW	>160 – 400 MW	- Coal	- Geothermal	Ultra-supercritical
>35 – 50 MW	>400 – 800 MW	- Oil	- Solar CSP	
>50 – 80 MW	>800 MW	Nuclear	- Waste Heat Recovery	

EMEA		AMERICAS	APAC
Africa	Middle East	Brazil	China
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France	Spain & Portugal	Rest of Latin America	South Korea
Germany	Turkey		Rest of Asia
Italy	UK & Ireland		

SALES CHANNEL	FREQUENCY
Direct to End-User	50 Hz
Direct to EPC	60 Hz
Direct to OEM	
Direct to Systems Integrator	

MARKET SEGMENTATIONS

Hydro Turbines Database

POWER RATING

1 – 10 MW	>80 – 120 MW
>10 – 20 MW	>120 – 160 MW
>20 – 35 MW	>160 – 400 MW
>35 – 50 MW	>400 – 800 MW
>50 – 80 MW	>800 MW

TURBINE TYPE

Bulb
Francis
Kaplan
Pelton
Pump
Other

HYDRAULIC HEAD

1 – 10 m
>10 – 50 m
>50 – 100 m
>100 – 500 m
>500 – 1,000 m
>1000 m

FLOW RATE

1 – 10 m³/s
>10 – 50 m³/s
>50 – 100 m³/s
>100 m³/s

EMEA

Africa	Middle East
Austria & Switzerland	Nordic Countries
Benelux	Poland
Central & Eastern Europe	Russian Fed. & CIS
France	Spain & Portugal
Germany	Turkey
Italy	UK & Ireland

AMERICAS

Brazil
Canada
Mexico
United States
Rest of Latin America

APAC

China
India
Japan
Oceania
South Korea
Rest of Asia

SALES CHANNEL

Direct to End-User
Direct to EPC
Direct to OEM
Direct to Systems Integrator

FREQUENCY

50 Hz
60 Hz

MARKET SEGMENTATIONS

Gas Engines Database

GAS ENGINES USED FOR ELECTRIC POWER GENERATION

POWER RATING BY MAJOR REGION

6 – 60 kW	451 – 560 kW
61 – 200 kW	561 – 800 kW
201 – 350 kW	801 – 1000 kW
351 – 450 kW	

FUEL TYPE BY MAJOR REGION

Natural Gas
 Dual Fuel (Excluding Direct Injection)
 Dual Fuel (Direct Injection)

EMEA

Africa	Middle East
Austria & Switzerland	Nordic Countries
Benelux	Poland
Central & Eastern Europe	Russian Fed. & CIS
France	Spain & Portugal
Germany	Turkey
Italy	UK & Ireland

AMERICAS

Brazil
 Canada
 Mexico
 United States
 Rest of Latin America

APAC

China
 India
 Japan
 Oceania
 South Korea
 Rest of Asia

2016 SPLITS BY POWER RATING

Residential vs. Commercial
 Standby vs. Prime Power vs. Peak Shaving
 Air Cooled vs. Water Cooled
 Natural Gas vs. Liquid Petroleum Gas vs. Bio-gases

MARKET SEGMENTATIONS

Radial Turboexpanders Database

GAS TEMPERATURE

Hot Gas
Cold Gas

GEAR DESIGN

Externally Geared
Integrally Geared

PRODUCT VS. SERVICES

Product Sales
Aftermarket Services

EMEA

Europe
Middle East & Africa
Russian Federation

AMERICAS

North America
South America

APAC

China
Rest of Asia

APPLICATION

Air Separation
LNG
Natural Gas Processing
Petrochemical Processing
Geothermal
Other Applications

LEAD ANALYST

Greg Johnson

Greg Johnson is a senior analyst in the Capital Equipment & Machinery group at IHS Markit. He joined IHS Markit in August 2011 and his research has been focused on capital equipment used in power generation including gas, steam, and hydro turbines, turbo-expanders, low, medium, and high power generators, wind generators, and generator sets. He has also worked on reports covering industrial fractional horsepower motors as well as numerous custom research and consulting projects.

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