



Competitor Landscape of the Turbine Services Market

Case Study

Client	Leading gas and steam turbine manufacturer
Industry	Power
Products	Steam and gas turbines

Context

- The client wanted to understand the market opportunity for servicing of gas and steam turbines and identify key competitors based on their product portfolios and geographic presence.

Key Business Questions

- What is the total global market size and opportunity for services in gas and steam turbines?
- Who are the key service providers and what is their market share?

Engagement Scope

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Market Analysis

- What is the value chain for rotating equipment services?
- What are the various maintenance practices for equipment services?
- What is the total market size for turbine services?
- What is the split between in-house servicing and OEM/third-party services?
- What is the split between servicing for gas turbines and steam turbines for OEM/third-party services?

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Competitor Landscape

- What are the types of service offerings provided by key players? (Field service providers vs. component repair companies vs. complete solution providers)
 - Field services include technical assistance and manpower
 - Component services include reconditioning and refurbishment, static component repair, and rotating component repair
- Who are the key players and what is their market share in turbine services?

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Key Findings and Conclusions

- What is the market potential for servicing across different end-use industries, such as process industry, oil and gas, and power utilities?
- Who are the client's key competitors and what are their main focus areas in terms of servicing capabilities?
- What is the total market for the client in terms of servicing opportunities based on OEM sales versus services offered by a third-party for its products?

Research Methodology

Secondary Research

- Conducted desk research by referring to annual reports of key players to understand the overall market and company revenues

Primary Research

- Conducted interviews of OEMs, third-party service providers, and end users

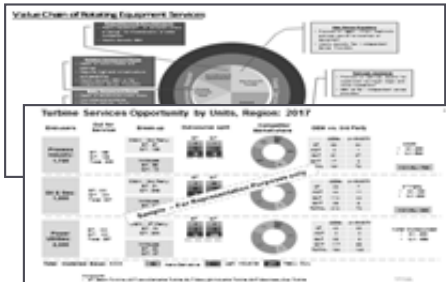
Benefits to Client

- Based on the study and recommendations, the client was able to gauge the market for services for steam and gas turbines and map key players based on the type of services provided by them.
- The client was also able to understand the total market opportunity available for servicing and analyze the quantum of servicing opportunity for its products versus services provided by other players in the market.

Sample Analysis

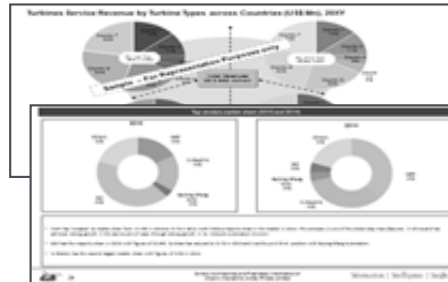
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Market Analysis



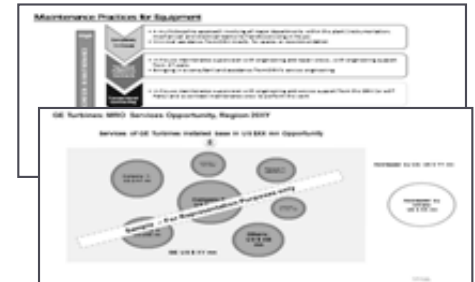
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Competitor Landscape



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Key Findings and Conclusions



Thank you

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