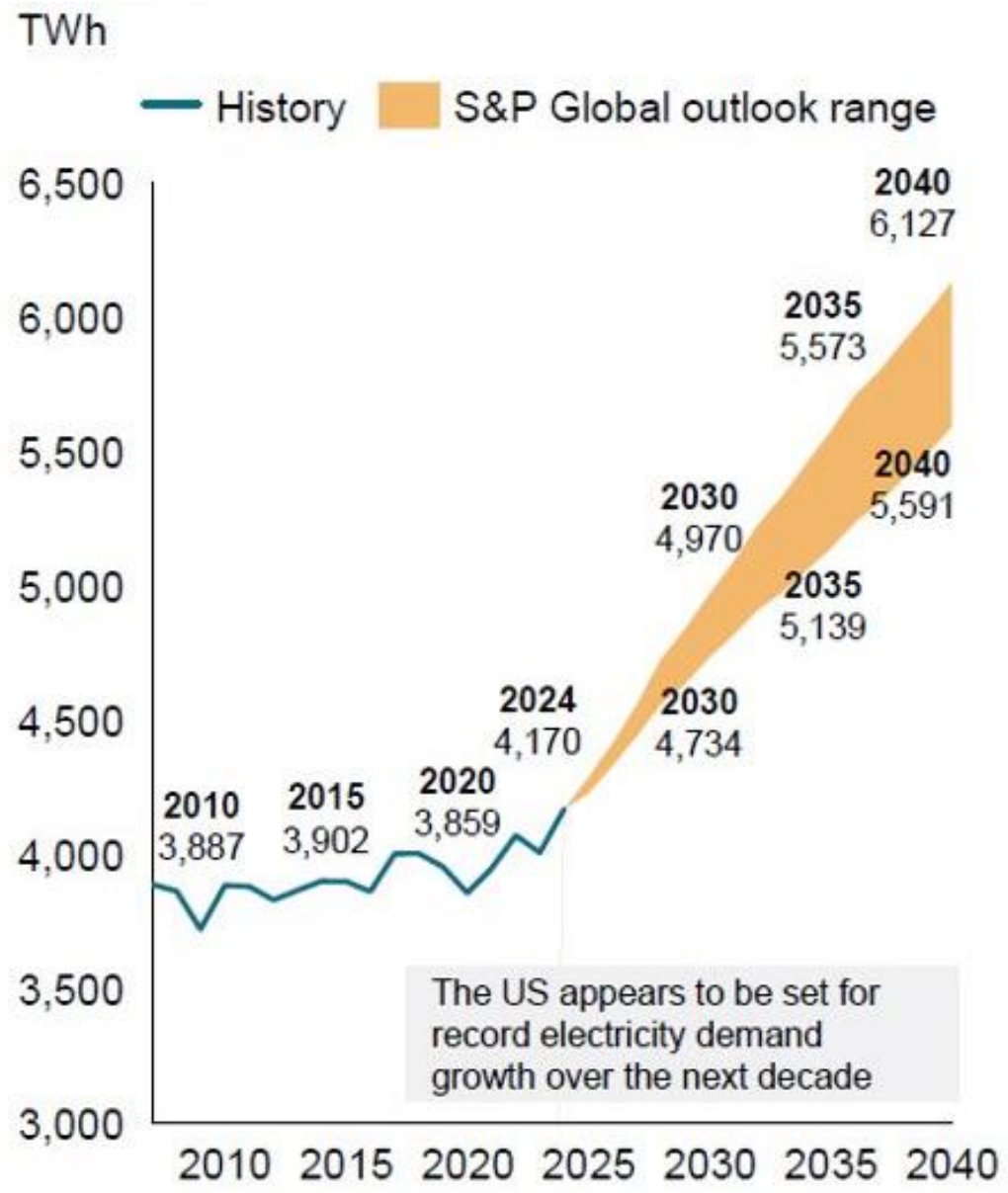
PULSE ON GAS GENERATION

Ready, GO, Set

George Ransom
Sr. Business Development Manager

pulse on the power market
2025 GENERATION SYMPOSIUM

US Lower 48 Net On-Grid Electricity Demand



Source: S&P Global Commodity Insights

Current BMcD Gas Projects

- RESERVE MARGINS
- LOAD GROWTH
- RENEWABLE LOAD FOLLOWING
- COAL RETIREMENTS
- DATA CENTERS
- CHIPS ACT

Mitsubishi to double production of gas turbines as po
plant expenses rise

Story by Cole Lauterbach • 3d • 3 min read

IN THIS ARTICLE

AI-DRIVEN DEMAND FOR GAS TURBINES RISKS A NEW ENERGY CRUNCH

Bloomberg Green

Orders for turbines to power natural gas plants are vastly outpacing supply, threatening the world's ability to

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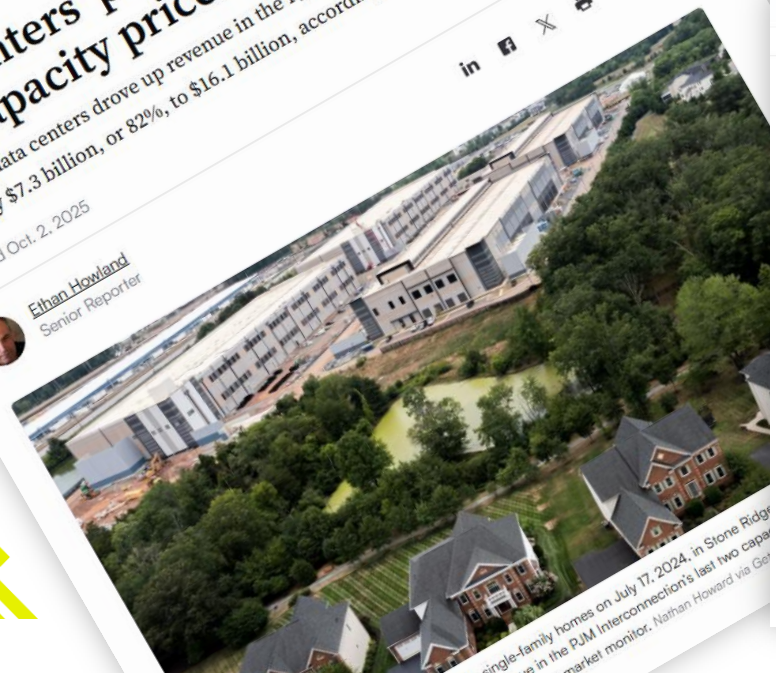
E BRIEF

Data centers 'primary reason' for high PJM capacity prices: market monitor

Load from data centers drove up revenue in the PJM Interconnection's last capacity auction by $7.3 billion, or 82%, to $16.1 billion, according to Monitoring Analytics.

Published Oct. 2, 2025

Ethan Howland
Senior Reporter



ingle-family homes on July 17, 2024, in Stone Ridge
in the PJM Interconnection's last two capac
market monitor. Nathan Howard via Ge

enel

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July 24, 2025

PJM's 2026/2027 Base Residual Auction results
demand response pricing hits the cap, up 22%
from last year

g in PJM Interconnection's 2026/2027 Base Residual Auction (BRA) cleared at the highest possible leve
highs, marking a 22% increase from last year's auction and reinforcing ongoing concerns around re

Bloomberg

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Mitsubishi Heavy to Double Turbine Capacity as Demand Soars

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GAS

Gas Power's Boom Sparks a Turbine Supply Crunch

Sonal Patel

Tuesday, April 1, 2025

SHARE:

Gas power is experiencing a stunning resurgence, driven by soaring electricity demand. But as utilities scramble to secure new capacity, a turbine supply crunch is unfolding, forcing urgent procurement strategies, strategic collaborations, and a rethink of long-term generation planning.

AP The Associated Press + Follow

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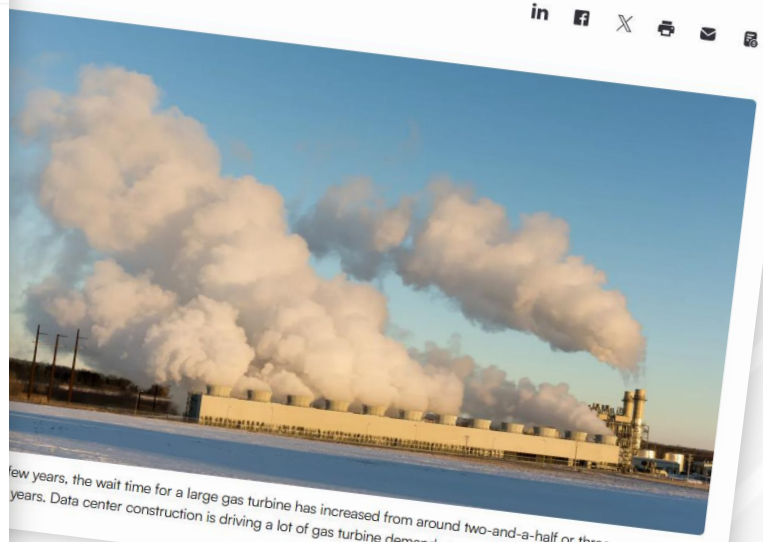
DIVE BRIEF

Gas turbine manufacturers expand capacity, but order backlog could prove stubborn

One expert said the industry moves are unlikely to "drastically reduce" wait times, which can stretch as long as seven years.

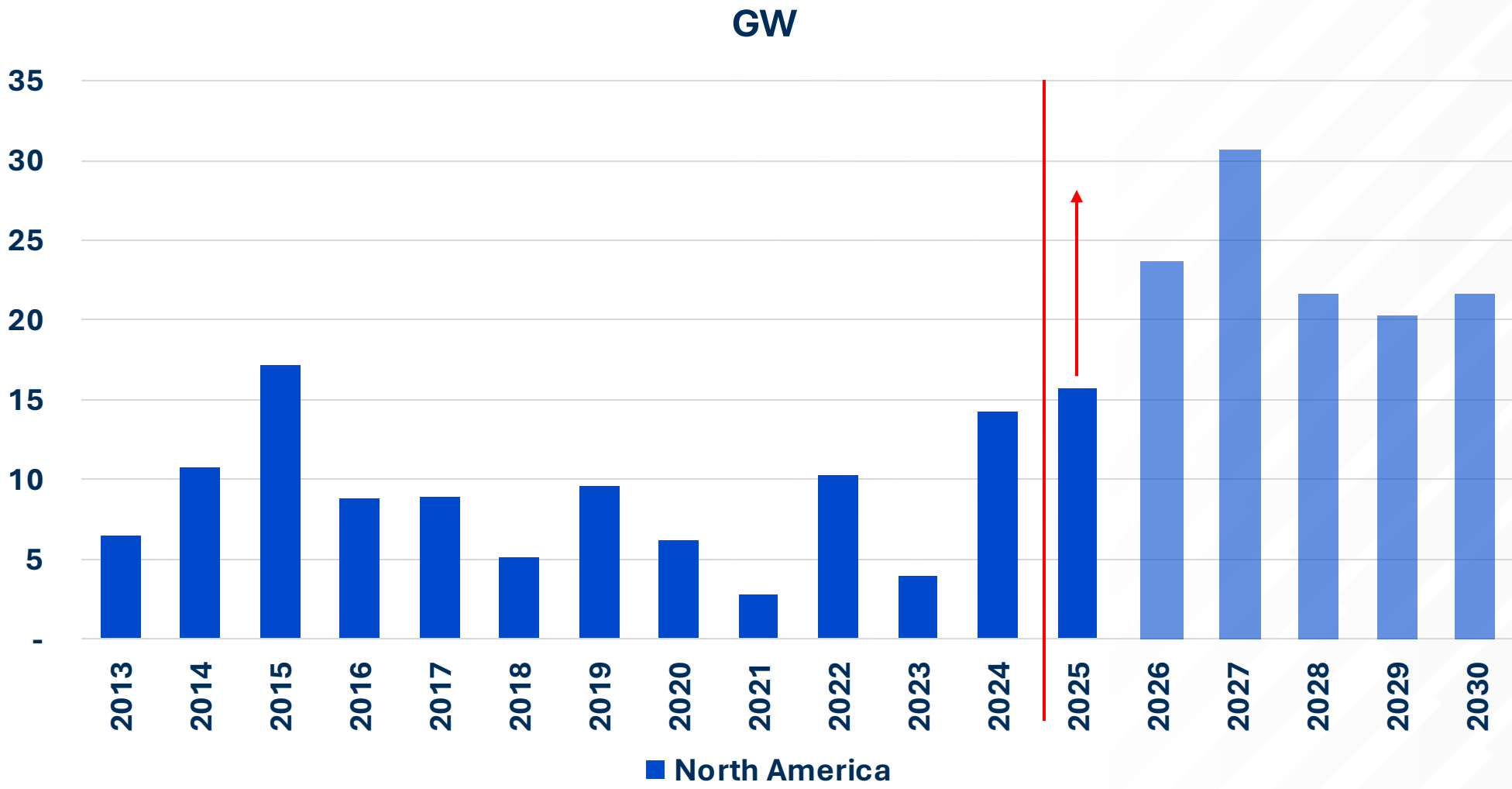
Published Sept. 5, 2025

Diana DiGangi
Reporter



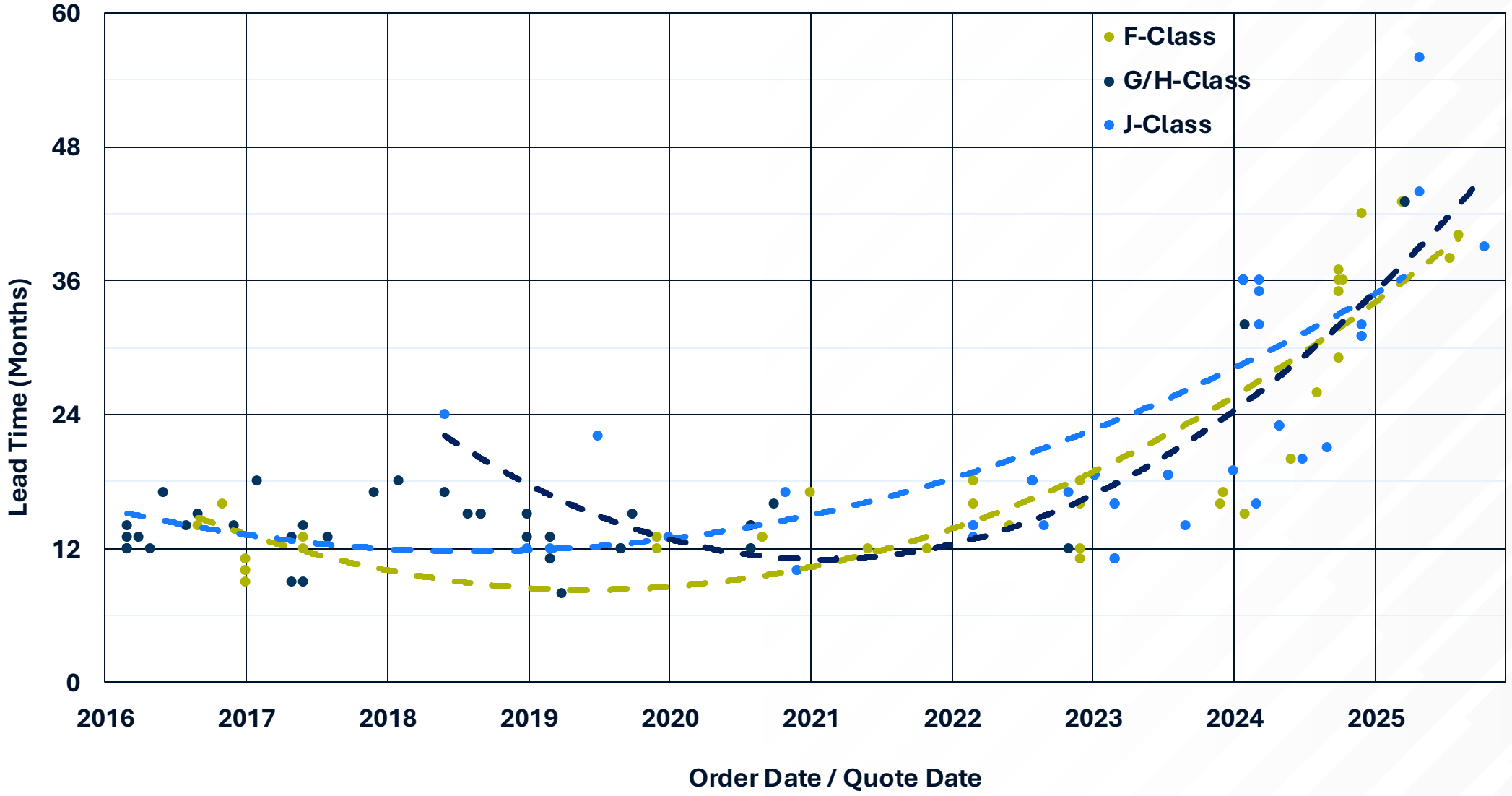
ew years, the wait time for a large gas turbine has increased from around two-and-a-half or three years to as years. Data center construction is driving a lot of gas turbine demand. James Pintar via Getty Images

Gas Turbine Sales



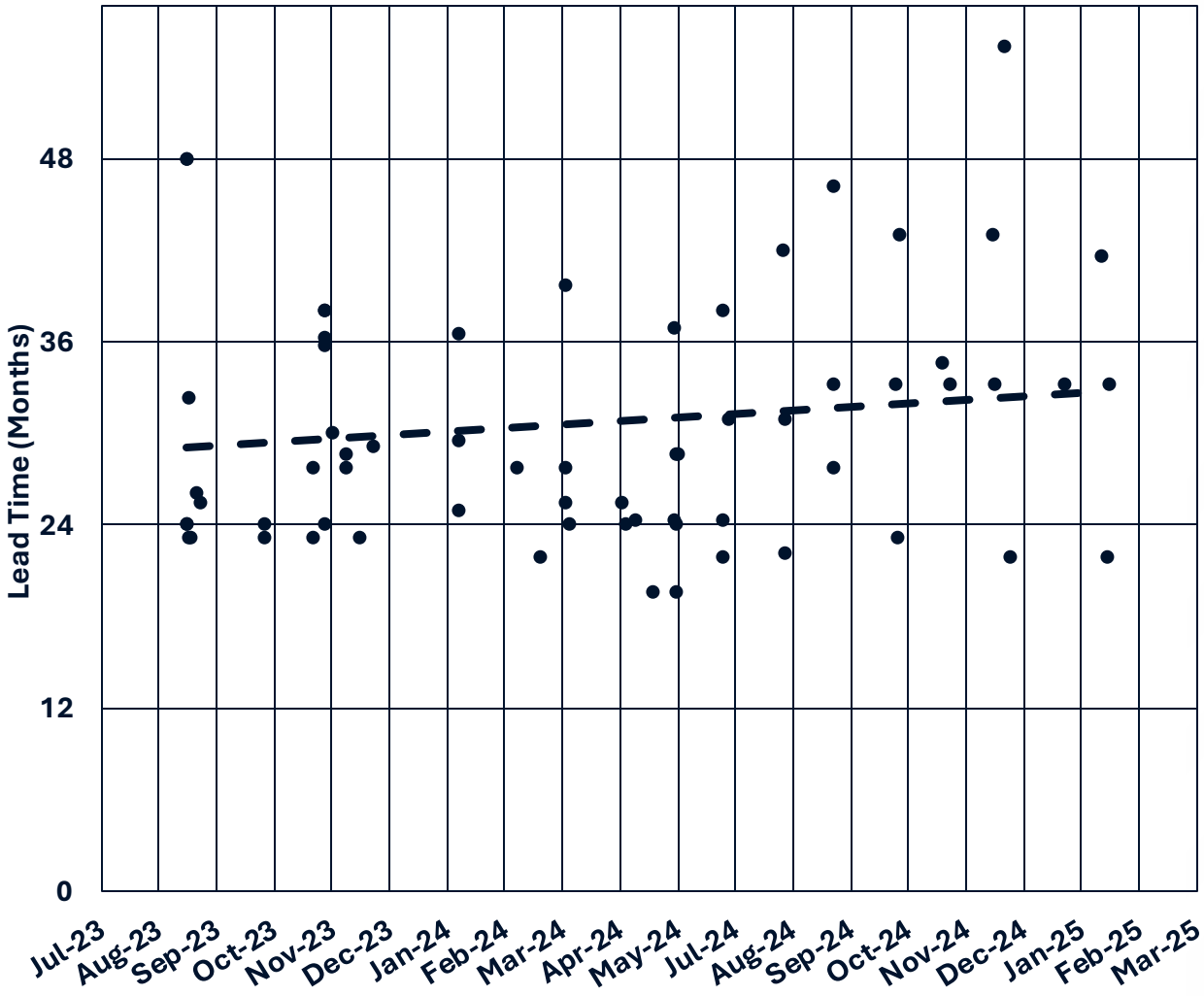
Source: McCoy, BofA Global Research

Gas Turbine Lead Times – Large Frame

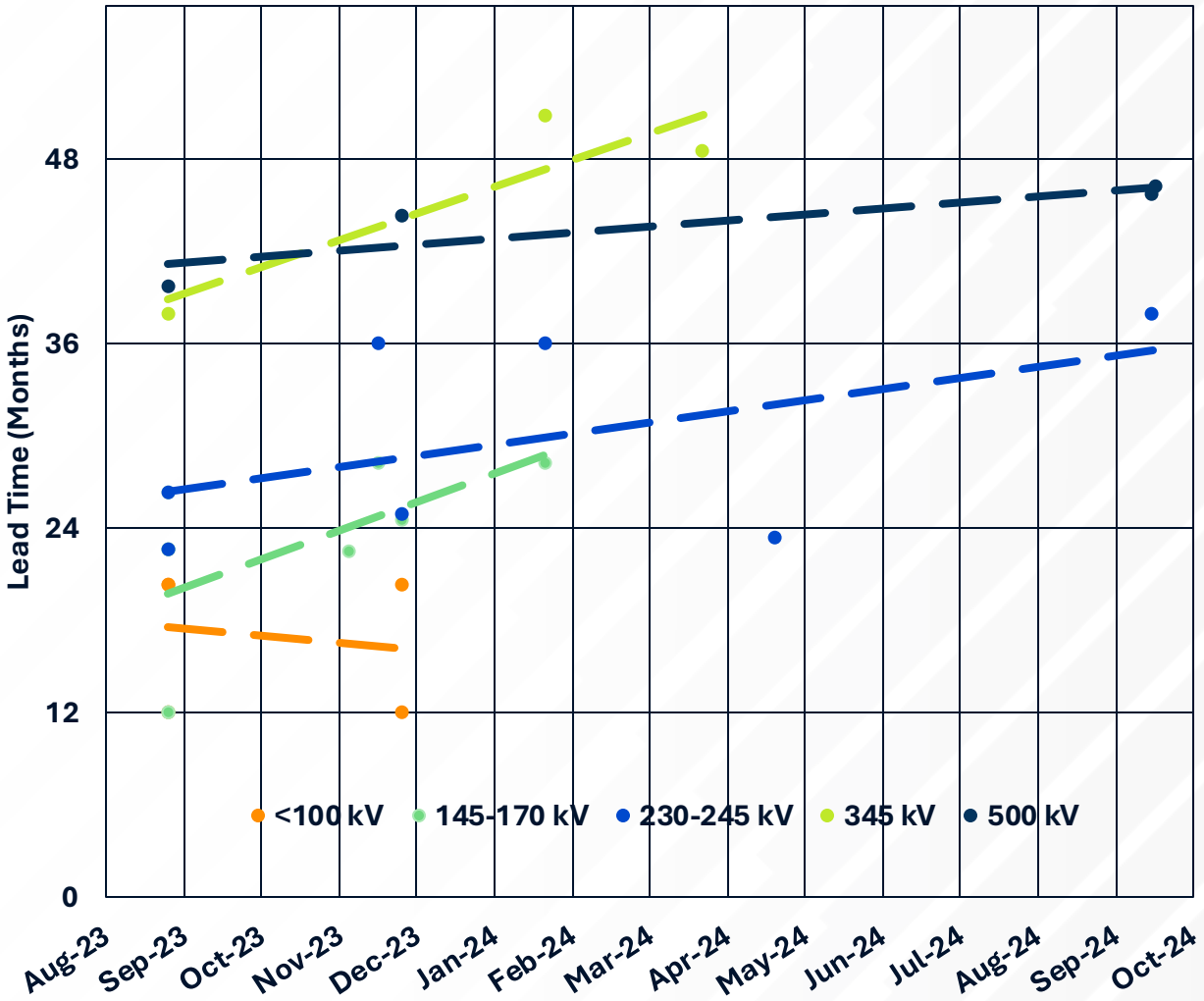


Source: McCoy, In-House Data

Large Transformers

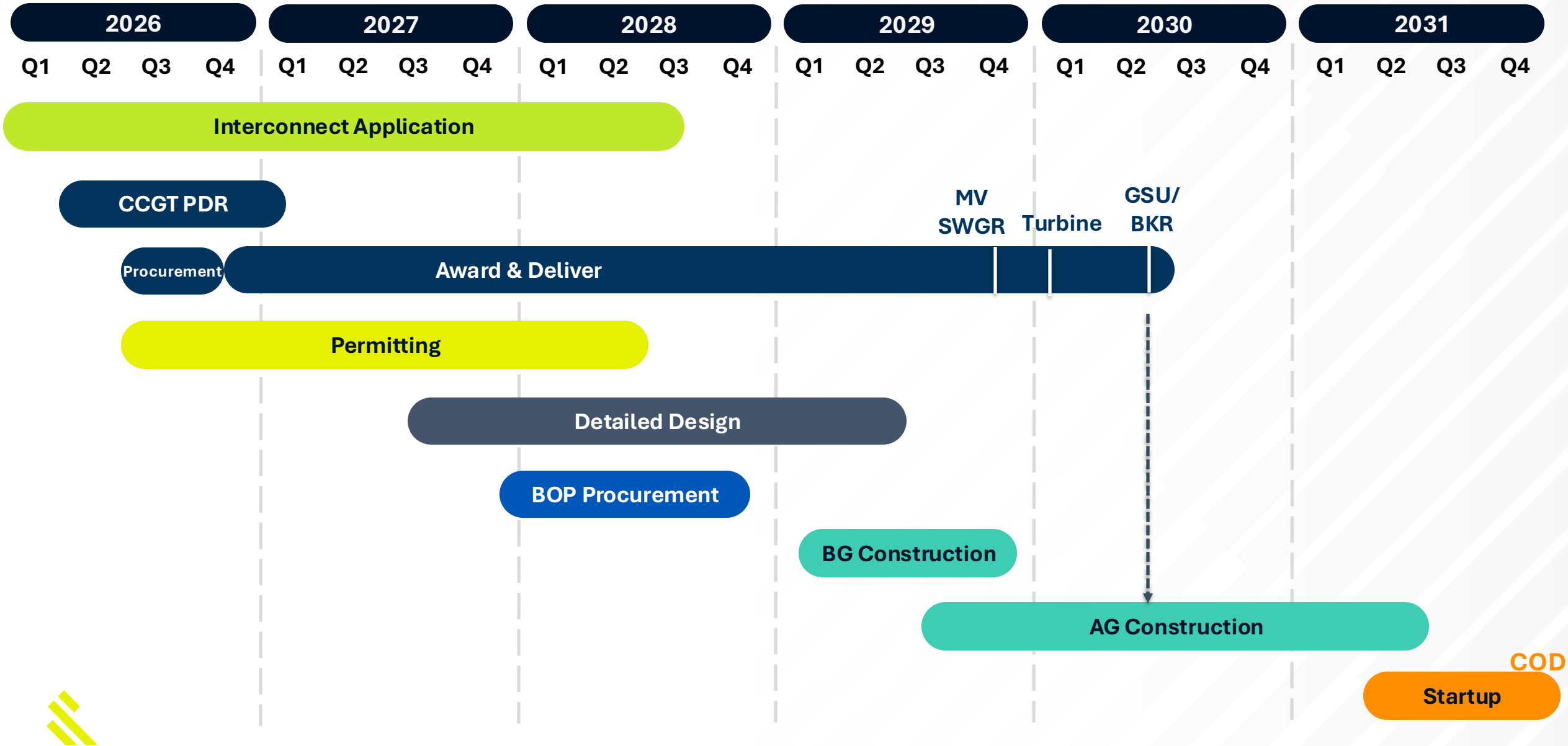


HV Breakers



Combined Cycle Sequence

600MW CCGT



When Is It Available?

Category	Historical Lead Time (months)	Current Lead Time (months)
F-Class Turbines	16-22	38-42
Advanced Class Turbines	16-24	40-56
HRSGs	16-18	18-36
GSUs	18-24	48-54
MV Switchgear	20-40 weeks	50-60 weeks

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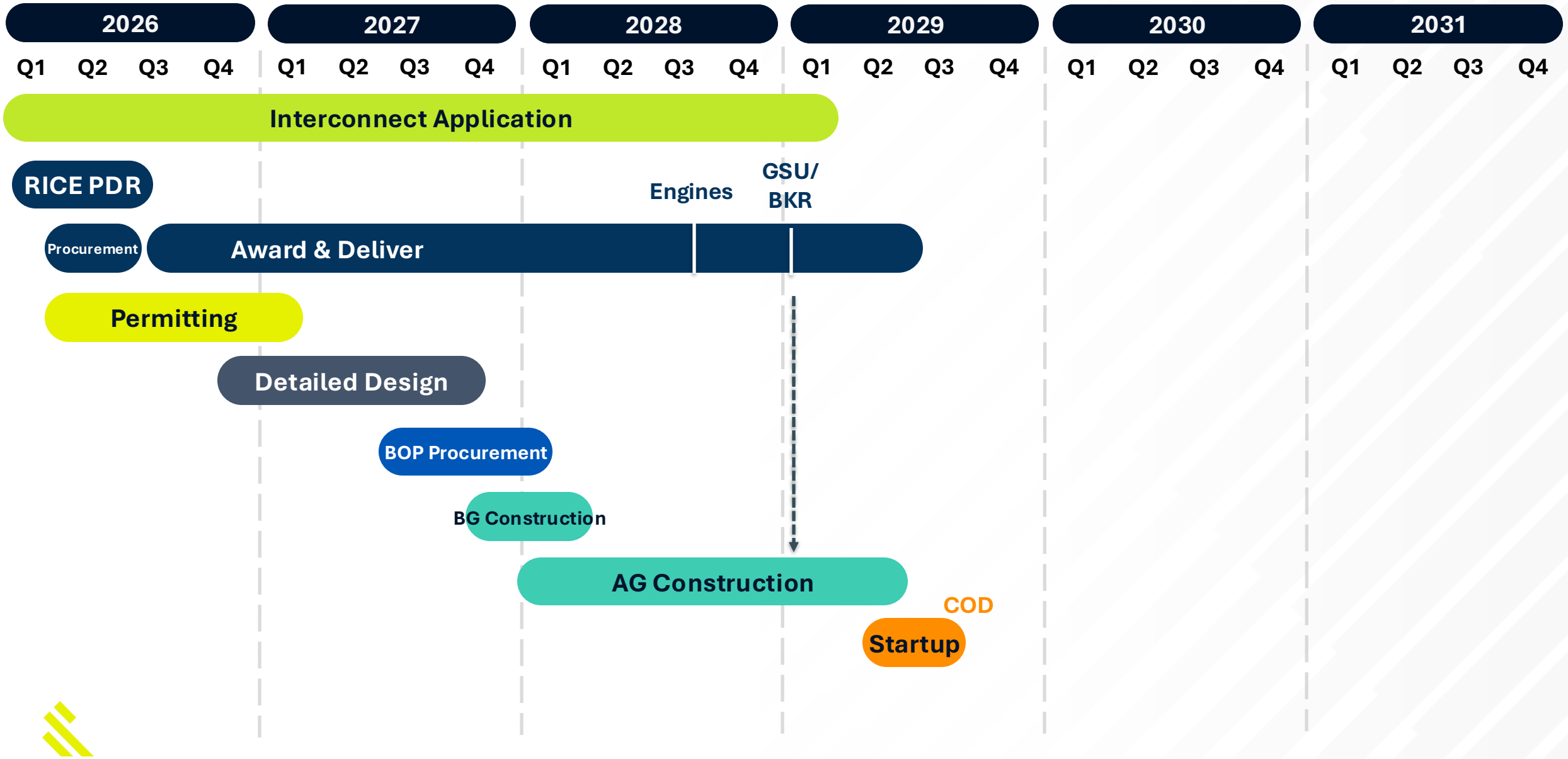
OEM Design Start	1-2	12-16
Aeroderivatives	10-20	25–30
9 – 12 MW RICE	10-12	20-22
18 – 23 MW RICE	12 – 16	27-31
16 – 24 MW Industrial Turbines	12-16	24-27
35 – 60 MW Industrial Turbines	14-18	28-34

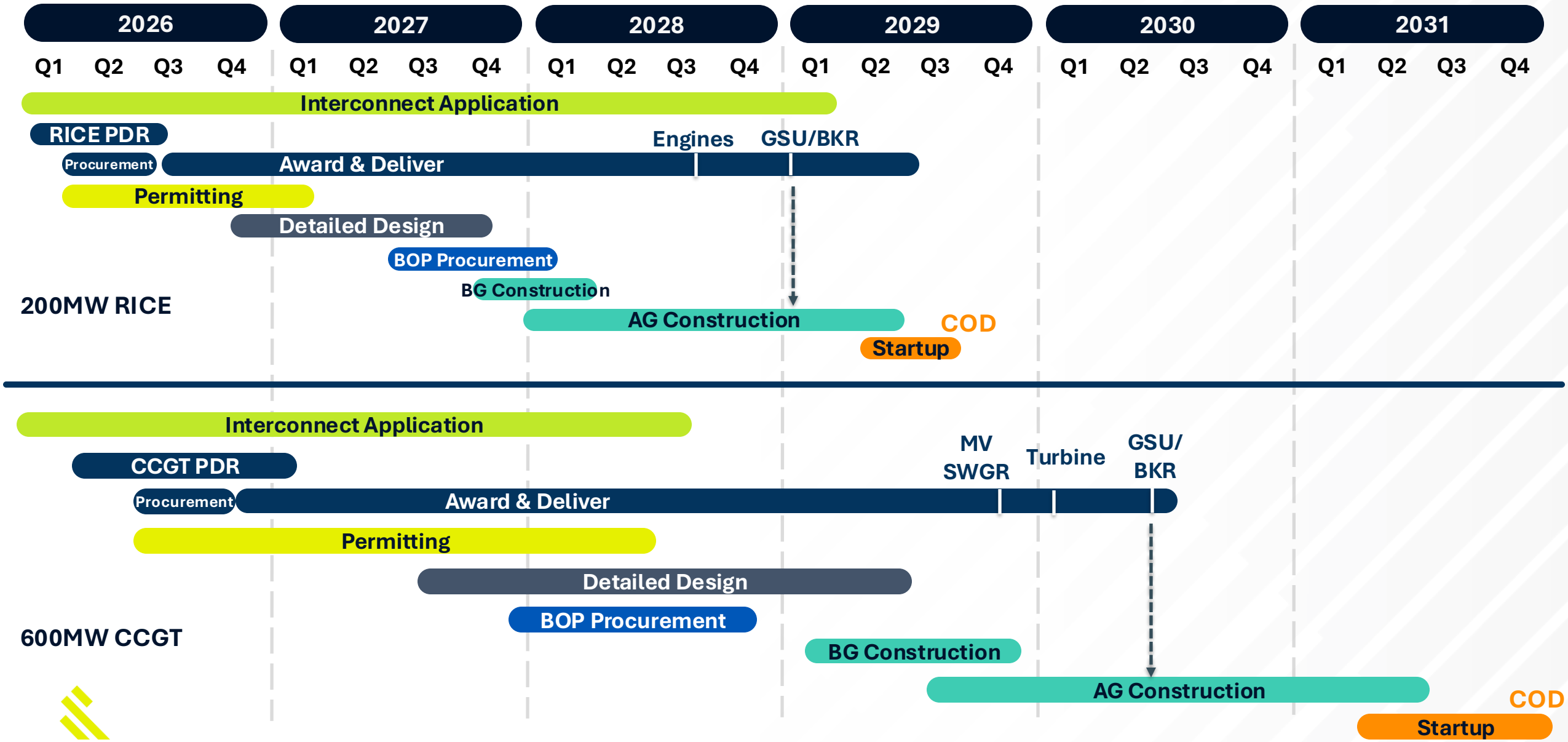
Bridging Power Sequence

200MW RICE



Short + Long Term Solution

200MW RICE + 600MW CCGT



Ready, Go, Set!

New Norm = Commitments Earlier

Relationships

The More You Know

2030-34 Project Wave