

Global Wind Turbine Slewing Bearing Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 2.2 bn
Forecast (2031)	USD 3.7 bn
CAGR (2021-2031)	8.8%
Study period	2021-2031
Largest region	Asia-Pacific · 58.4%
Fastest-growing region	Asia-Pacific · 9.8%
Market concentration	Moderate
Licence	Individual / Company

The global wind turbine slewing bearing market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Demand is moving toward larger pitch, yaw and moment-bearing assemblies as turbine ratings increase and offshore platforms impose higher axial loads, overturning moments and corrosion-resistance requirements. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's 120 GW of new wind installations during the year and increasingly localized turbine-component supply chains. The report quantifies demand by application, bearing design, installation environment, turbine capacity, sales channel and geography while benchmarking the leading global and regional suppliers.

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Executive summary

The global wind turbine slewing bearing market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at an XX% CAGR. Demand is moving toward larger pitch, yaw and moment-bearing assemblies as turbine ratings increase and offshore platforms impose higher axial loads, overturning moments and corrosion-resistance requirements. Asia-Pacific accounted for XX% of 2025 revenue, supported by China's 120 GW of new wind installations during the year and increasingly localized turbine-component supply chains. The report quantifies demand by application, bearing design, installation environment, turbine capacity, sales channel and geography while benchmarking the leading global and regional suppliers.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031 at an XX% CAGR.
- Asia-Pacific represented XX% of 2025 market revenue and will remain the fastest-growing region at a XX% CAGR.
- Pitch bearings generated XX% of 2025 revenue because each conventional three-bladed turbine requires three blade-bearing assemblies.
- Offshore installations accounted for XX% of revenue and will grow at a XX% CAGR as larger diameters, premium sealing and high-load roller designs raise bearing value per turbine.
- GWEC recorded 117 GW of global wind capacity additions in 2024 and forecasts almost 1 TW of additional installations through 2030.
- China's National Energy Administration recorded 120 GW of new wind capacity in 2025, lifting cumulative grid-connected wind capacity to 640 GW, including 47 GW offshore.
- European Commission data show EU wind capacity reached 246 GW in 2025, compared with 231 GW in 2024.
- OEM supply represented XX% of 2025 revenue, while the replacement and retrofit channel will expand at a faster XX% CAGR.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Wind Turbine Slewing Bearing Market Trends and Growth Drivers

Wind turbine slewing-bearing demand is determined by more than installed megawatts. Turbine count sets the unit opportunity, while rotor diameter, hub flexibility, offshore exposure and bearing architecture determine value per unit. The shift to fewer but larger turbines therefore favors suppliers with large-ring manufacturing, application engineering and full-scale validation capabilities.

Pitch bearings face a distinctive operating regime of small oscillatory movements, changing loads and limited lubricant-film formation. As blades lengthen, deformation at the hub and blade root can alter internal load distribution, increasing the importance of raceway geometry, preload, seals, cages and mounting-interface design.

Industry economics divide into high-volume OEM programs and a service-sensitive aftermarket. OEM awards deliver scale but impose qualification expense and price pressure; replacement programs offer higher unit margins but require turbine-specific knowledge, rapid availability and credible failure analysis.

Growth drivers

Record wind deployment pipeline

Annual turbine installations directly determine OEM demand for pitch and yaw bearings, with three pitch units and at least one yaw assembly required on most horizontal-axis platforms. GWEC's nearly 1 TW installation outlook through 2030 provides suppliers with a multiyear order base, led by China, Europe, India and selected emerging markets.

Turbine and rotor upscaling

Higher-rated turbines require larger bearing diameters, heavier rings, improved raceway geometry and tighter control of structural deformation. The resulting increase in material content, machining complexity and validation intensity lifts bearing revenue faster than installed turbine count.

Offshore wind expansion

Offshore turbines combine high overturning moments with saltwater exposure and costly maintenance access. Suppliers capture a premium from multi-row roller designs, advanced sealing, corrosion protection and extensive life testing, while floating platforms introduce additional cyclic-load requirements.

Ageing fleet and repowering

The installed fleet from the rapid build-out of the 2000s and 2010s is entering a more maintenance-intensive phase. Operators increasingly replace pitch and yaw bearings with strengthened designs during major overhauls or repowering campaigns, expanding the independent aftermarket.

Regional manufacturing policy

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Auction prequalification, resilience criteria and approved-component regimes encourage turbine OEMs to qualify local or regionally traceable bearing capacity. This supports investment in ring rolling, machining, heat treatment and service inventory near major installation markets.

Reliability-led design change

Larger blades magnify oscillating wear, edge loading and hub-deformation effects in pitch bearings. OEMs are adopting higher-capacity cages, optimized raceways, roller architectures, integrated structural units and full-scale testing to extend service intervals.

Restraints

Auction and financing volatility

Higher capital costs, permitting delays and underpriced auctions have weakened the bankability of several offshore projects. Delayed final investment decisions shift bearing orders, reduce factory utilization and make capacity planning more difficult for suppliers.

Forging and hardening bottlenecks

Very large bearing rings require specialized steel, ring-rolling, machining and induction-hardening assets with long investment lead times. Bottlenecks intensify for next-generation offshore dimensions and can delay prototype and serial deliveries.

OEM purchasing pressure

Consolidated turbine platforms create substantial buyer power and aggressive annual cost-down expectations. Suppliers must absorb steel-price volatility and engineering expense while maintaining extremely low field-failure rates.

Extended platform qualification

A new bearing design must pass analytical validation, material audits, rig testing and turbine-level certification before serial production. Qualification cycles restrict rapid entry and can strand development expenditure when an OEM changes its platform roadmap.

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Driver and Restraint Impact on the Wind Turbine Bearing Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Record wind deployment pipeline	XXX	XXX	XXX
Turbine and rotor upscaling	XXX	XXX	XXX
Offshore wind expansion	XXX	XXX	XXX
Ageing fleet and repowering	XXX	XXX	XXX
Regional manufacturing policy	XXX	XXX	XXX
Reliability-led design change	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Auction and financing volatility	XXX	XXX	XXX
Forging and hardening bottlenecks	XXX	XXX	XXX
OEM purchasing pressure	XXX	XXX	XXX
Extended platform qualification	XXX	XXX	XXX

Source: XXX

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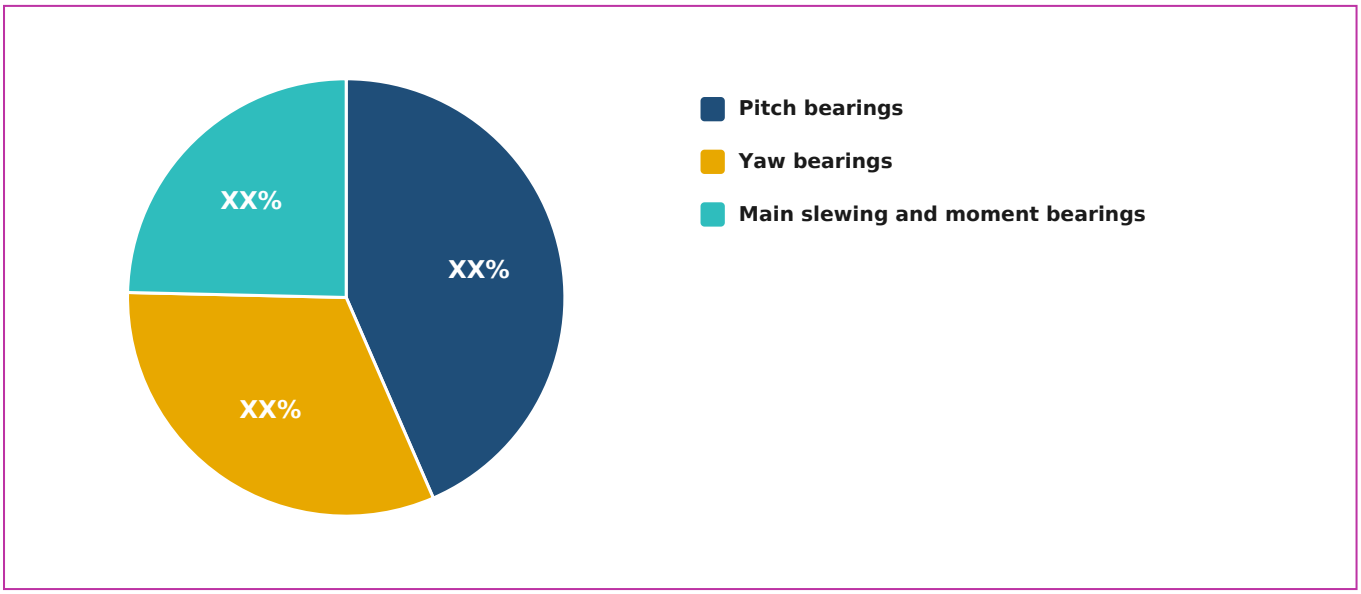
Wind Turbine Slewing Bearing Market Segmentation Analysis

By Application

Pitch bearings dominate because three units are installed on a conventional three-bladed turbine and must transfer changing blade loads while operating through small oscillatory movements. Yaw bearings represent a smaller unit count but remain essential to nacelle alignment. Slewing-type main bearings grow fastest as compact direct-drive and medium-speed architectures move toward large moment-bearing solutions.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Pitch bearings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Yaw bearings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Main slewing and moment bearings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Bearing Design

Single- and double-row four-point contact ball bearings retain the broadest installed base and offer cost-effective pitch and yaw functionality. Three-row, crossed and tapered roller arrangements gain share in high-load turbines because they separate load paths and control deflection more effectively. Hybrid and

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specialized architectures address platform-specific weight, friction and integration requirements.

Value by bearing Design, USD bn

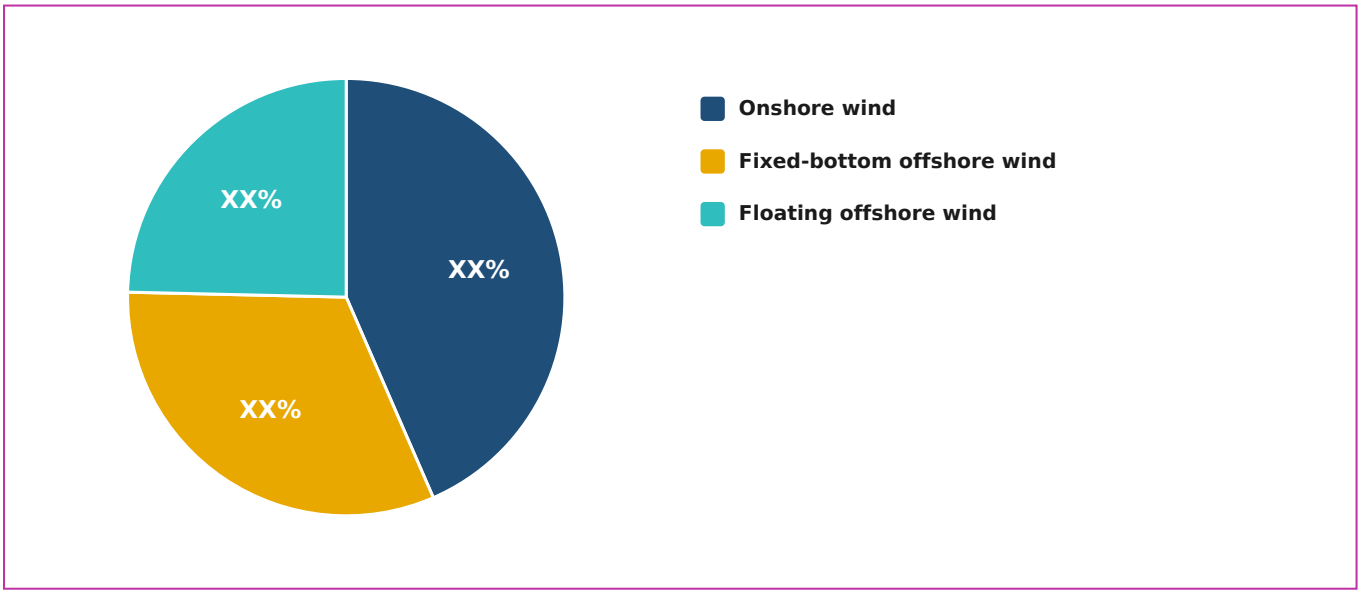
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Single- and double-row ball bearings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Three-row and crossed-roller bearings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tapered, hybrid and specialized designs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Installation

Onshore remains the volume foundation because it accounts for most annual turbine installations and installed units. Offshore bearings command much higher revenue per turbine due to greater diameters, heavier loads, corrosion protection and more intensive validation. Floating wind creates an emerging design frontier but remains a small part of the forecast-period total.

Value share by installation, 2025



Source: XXX

Value by installation, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Onshore wind	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fixed-bottom offshore wind	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Floating offshore wind	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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By Turbine Capacity

The 3-6 MW range captures mainstream Chinese and international onshore platforms and therefore leads current revenue. Smaller turbines remain important in the replacement market and selected price-sensitive installations. Offshore development shifts the mix toward ratings above 10 MW, where bearing diameter, mass and engineering value rise sharply.

Value by turbine Capacity, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 3 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 3 MW to 6 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 6 MW to 10 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 10 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

OEM contracts dominate because bearings are co-engineered and qualified for specific turbine platforms before serial production. The aftermarket is expanding as older fleets require replacement, operators seek redesigned components and repowering projects extend asset life. Fast delivery, reverse engineering and local service stocks are decisive in replacement procurement.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
OEM and system integrator	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aftermarket, retrofit and repowering	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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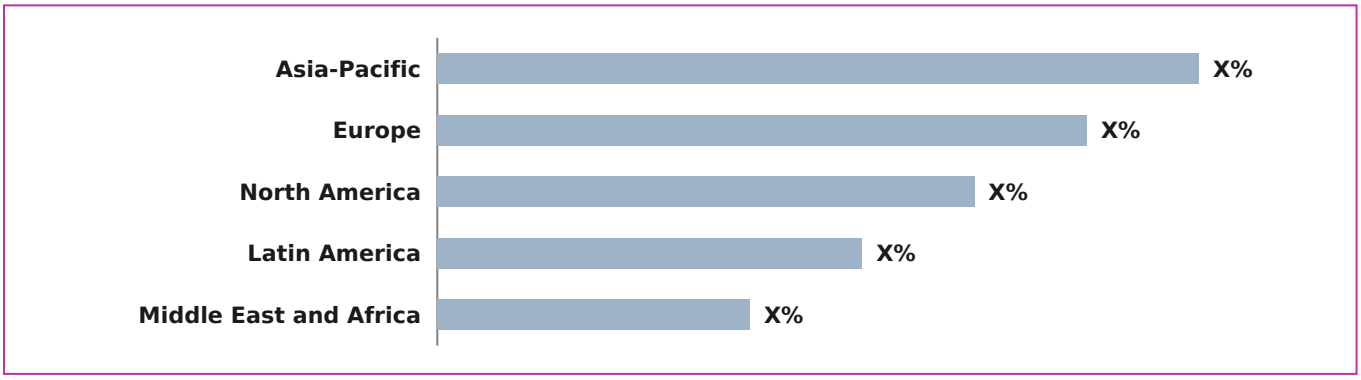
Wind Turbine Slewing Bearing Market Regional Analysis and Country Outlook

Asia-Pacific controlled XX% of market revenue in 2025 and will advance at a XX% CAGR through 2031. China is the pivotal demand and manufacturing center: the National Energy Administration reported 120 GW of new wind capacity in 2025 and 640 GW installed at year-end. Domestic turbine upscaling, large offshore platforms and vertically coordinated component procurement support high-volume demand for pitch, yaw and rotor-support bearings, while India is strengthening its local supplier ecosystem through platform and component approval requirements.

Europe represented XX% of 2025 revenue and remains the leading market for high-value offshore designs, full-scale validation and aftermarket engineering. EU wind capacity reached 246 GW in 2025, and North Seas auction schedules sustain demand for large-diameter, corrosion-protected bearings. Germany anchors component engineering and production, Denmark concentrates turbine design and test infrastructure, and the United Kingdom provides a substantial offshore installed base and replacement opportunity.

North America accounted for XX% of 2025 revenue, led by the United States onshore fleet and a growing replacement market. Latin America is centered on Brazil, where localization and strong wind resources support regional component supply, while Middle East and Africa demand is led by South Africa, Egypt, Morocco and selected Gulf projects. These smaller regions offer attractive entry points for modular product families and distributor-supported aftermarket inventory.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Wind Turbine Slewing Bearing Market Competitive Landscape and Company Share

The market is moderately concentrated. thyssenkrupp Rothe Erde, Schaeffler, SKF, Liebherr and IMO combine large-ring engineering, global OEM relationships and advanced raceway-processing capabilities, while ZWZ, LYC, Dalian Metallurgical Bearing and other Chinese suppliers hold substantial positions in the world's largest turbine-manufacturing cluster. Competition is platform-specific because each hub, blade interface and yaw deck requires tailored geometry, load calculations and qualification.

Technology strategy is shifting from stand-alone rings toward engineered systems. Rothe Erde is commercializing its Pitch Bearing Unit and signed a joint-development agreement with Shanghai Electric Wind Power in 2025; Schaeffler commissioned a 560-ton rotor-bearing test load unit with LORC; and NSK introduced a main-shaft bearing combining Super-TF material, DLC-coated rollers and a high-capacity cage. These investments reinforce the importance of simulation, full-scale testing and field feedback.

Capacity positioning follows turbine manufacturing and service demand. Chinese suppliers compete through scale and local OEM integration, European suppliers emphasize offshore engineering and high-load roller designs, and multinational bearing groups use regional factories and service networks to support localization. Aftermarket competition remains more fragmented because fleet-specific inventories, failure analysis and rapid delivery can outweigh original-platform incumbency.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
thyssenkrupp Rothe Erde	XXX	XXX	XXX	XXX
Schaeffler AG	XXX	XXX	XXX	XXX
SKF Group	XXX	XXX	XXX	XXX
Liebherr Group	XXX	XXX	XXX	XXX
IMO Group	XXX	XXX	XXX	XXX
The Timken Company	XXX	XXX	XXX	XXX
NSK Ltd.	XXX	XXX	XXX	XXX
NTN Corporation	XXX	XXX	XXX	XXX
ZWZ Bearing Group	XXX	XXX	XXX	XXX
Luoyang LYC Bearing Co., Ltd.	XXX	XXX	XXX	XXX

Source: XXX

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Wind Turbine Slewing Bearing Market Forecast and Opportunities

The market will reach USD XXX billion by 2031 as annual wind additions, higher turbine ratings and replacement demand expand the addressable revenue pool. Market value will grow faster than turbine count because offshore platforms and large rotors require heavier rings, more complex heat treatment, premium sealing and longer qualification programs.

The central technology contest will concern control of deformation and oscillating wear. Three-row roller bearings, crossed-roller concepts, reinforced pitch-bearing units, slipless-hardened raceways and more representative full-scale validation will gain adoption as turbines move beyond 15 MW and rotor diameters approach 300 meters.

Winning suppliers will secure long-duration OEM platform positions while building a separate aftermarket proposition around rapid replacement, upgraded geometry and regional stocks. Upside to the forecast comes from faster Chinese offshore deployment and improved European auction execution; downside centers on financing delays, turbine-OEM margin pressure and insufficient large-ring manufacturing capacity.

Opportunities

- Integrated pitch-bearing units that reinforce flexible hubs
- Three-row roller and crossed-roller designs for large offshore turbines
- Condition-enabled aftermarket replacement and remanufacturing programs
- Localized production in India, Brazil, Southeast Asia and the United States
- Low-friction seals, slipless hardening and corrosion-resistant offshore coatings
- Full-scale testing and digital-twin services for turbines above 15 MW

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