

# EU HYDROPOWER TURBINE & COMPONENTS

## IMPORT INTELLIGENCE - 2026 EDITION

FREE MARKET SNAPSHOT | Extra-EU imports | H1 2025 vs H1 2026

|               |               |           |                  |
|---------------|---------------|-----------|------------------|
| €19.45M       | €23.09M       | +18.7%    | 93.8%            |
| H1 2025 VALUE | H1 2026 VALUE | VALUE YoY | 2026 PARTS SHARE |

### Executive snapshot

EU extra-EU hydropower equipment imports increased 18.7% in H1 2026, reaching €23.09M. The headline growth, however, hides a major change in composition: parts rose 29.0%, while complete-turbine imports fell 46.3%.

Supplier concentration also increased. Türkiye overtook China as the largest external source by import value, and Türkiye, China and Switzerland together supplied 76.3% of the H1 2026 market.

| Metric             | H1 2025  | H1 2026  | Change  |
|--------------------|----------|----------|---------|
| Total import value | €19.45M  | €23.09M  | +18.7%  |
| Net mass           | 1.55M kg | 1.83M kg | +17.9%  |
| Complete turbines  | €2.66M   | €1.43M   | -46.3%  |
| Parts              | €16.79M  | €21.66M  | +29.0%  |
| Parts share        | 86.3%    | 93.8%    | +7.5 pp |

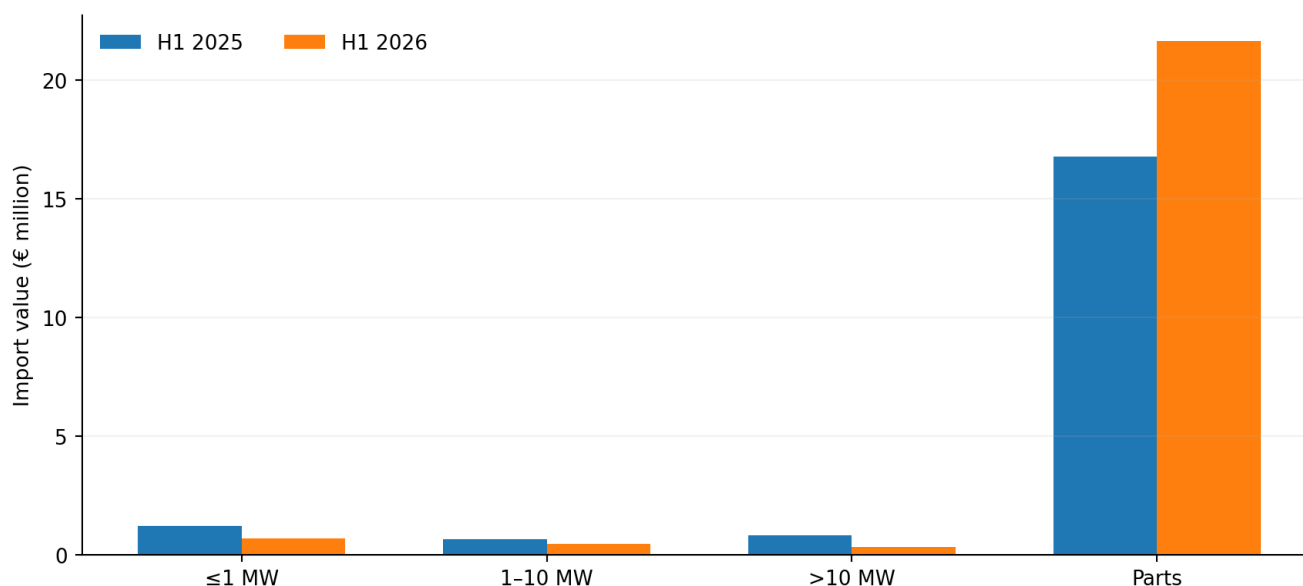
### Three signals to watch

- 1. Component dependence deepened.** Parts represented 93.8% of total H1 2026 import value.
- 2. Finished-turbine imports contracted.** Every complete-turbine power band declined year on year.
- 3. Supplier concentration increased.** The top-three share rose from 67.2% to 76.3%.

# Where the Growth Came From

The market grew in value, but not because Europe imported more complete turbines. The increase was concentrated in components.

Import value by segment



| Segment          | H1 2025 | H1 2026 | YoY    |
|------------------|---------|---------|--------|
| Turbines ≤1 MW   | €1.20M  | €0.68M  | -43.5% |
| Turbines 1–10 MW | €0.64M  | €0.45M  | -30.1% |
| Turbines >10 MW  | €0.82M  | €0.30M  | -63.0% |
| Parts            | €16.79M | €21.66M | +29.0% |

## Readout

The steepest decline occurred in turbines above 10 MW, down 63.0%. Turbines at or below 1 MW fell 43.5%, and the 1-10 MW category declined 30.1%. Against those declines, parts increased from €16.79M to €21.66M.

That mix matters: complete turbines represented only about 6.2% of H1 2026 import value. The external trade picture is therefore overwhelmingly component-driven.

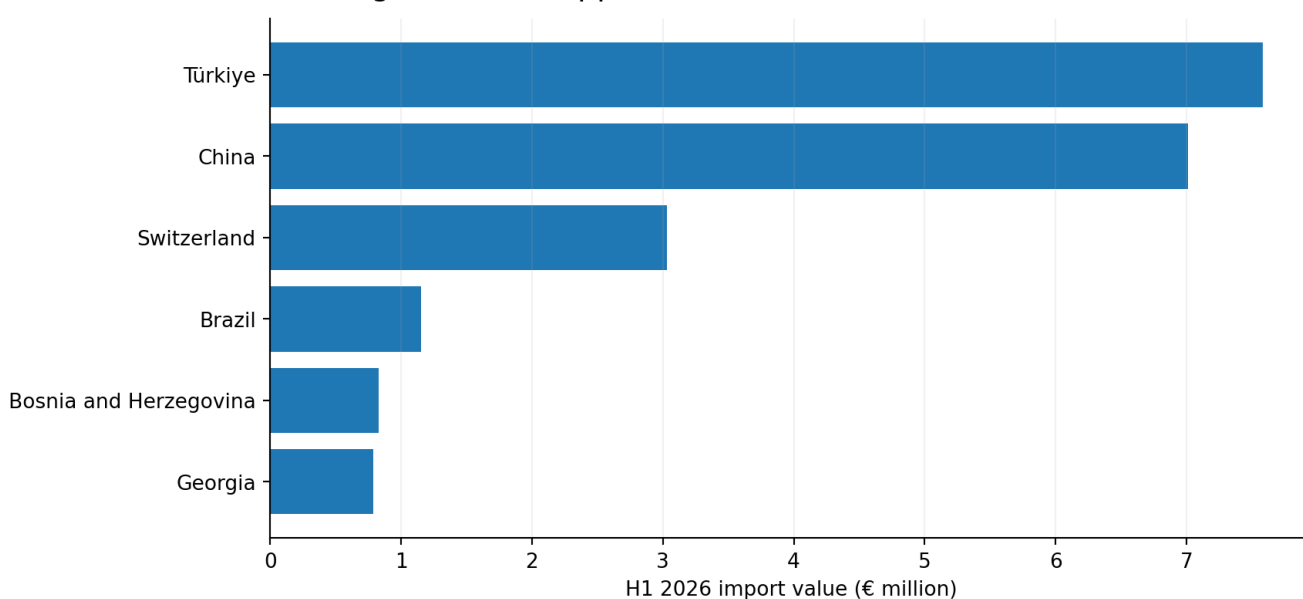
## What this free sample tells you

The headline +18.7% growth rate should not be interpreted as a broad expansion in finished hydropower machinery imports. The stronger signal is a shift toward imported components.

# Supplier Concentration

The supplier mix changed sharply in H1 2026, with Türkiye moving into first place and the market becoming more concentrated among its three largest sources.

Leading extra-EU suppliers - H1 2026



| Supplier               | H1 2025 | H1 2026 | YoY     | 2026 share |
|------------------------|---------|---------|---------|------------|
| Türkiye                | €2.60M  | €7.58M  | +191.8% | 32.8%      |
| China                  | €7.14M  | €7.01M  | -1.8%   | 30.4%      |
| Switzerland            | €3.34M  | €3.03M  | -9.2%   | 13.1%      |
| Brazil                 | €1.32M  | €1.15M  | -13.0%  | 5.0%       |
| Bosnia and Herzegovina | €0.59M  | €0.83M  | +40.5%  | 3.6%       |

## The standout move

Türkiye's import value rose from €2.60M to €7.58M (+191.8%), lifting its share from 13.4% to 32.8%. China remained broadly stable at €7.01M, while Switzerland ranked third at €3.03M.

## Methodology note

Source: Eurostat / Comext DS-045409. Scope: EU27\_2020 aggregated reporter; imports; extra-EU supplier countries; January-June 2025 versus January-June 2026. Trade data measure recorded cross-border goods flows and do not directly measure consumption, production, installed capacity or project awards.

## FULL 2026 EDITION

The paid report adds the complete supplier landscape, supplier-shift analysis, 2026 CN component breakdown, classification bridge, commercial interpretation and full methodology/data notes.