



GlobalData»

**GAS-GENERATOR MARKET -
GLOBAL MARKET SIZE, EQUIPMENT SHARE AND
COMPETITIVE ANALYSIS TO 2020**

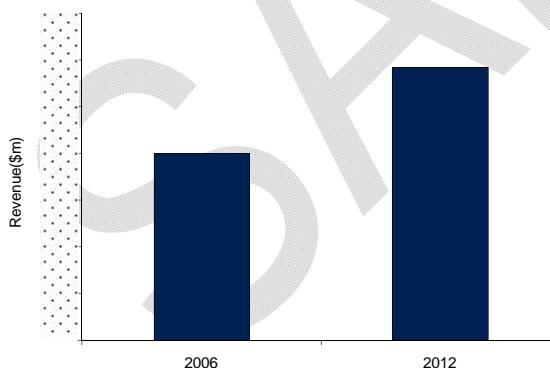
Executive Summary

Global Gas-Generator Market Reached \$XX billion in 2012

The global gas-generator set (genset) market is valued at over \$XX billion in 2012, increasing from \$XX billion in 2006 at a Compound Annual Growth Rate (CAGR) of XX%. In the forecast period, the market is expected to continue to grow at a steady pace. The US, Brazil and China are some of the major markets, and cumulatively account for more than half of the global gas-genset market. In the future, it is expected that China and Brazil's share will increase marginally, although the US is expected to retain its leading position.

The gas-genset market faces stiff competition from diesel gensets, which are more widely used due to their high availability and low prices. However, gas gensets are expected to gain more popularity in the future, due to their increased usage by the residential sector.

Gas-Generator Market, Global, Revenue (\$m), 2006 and 2012

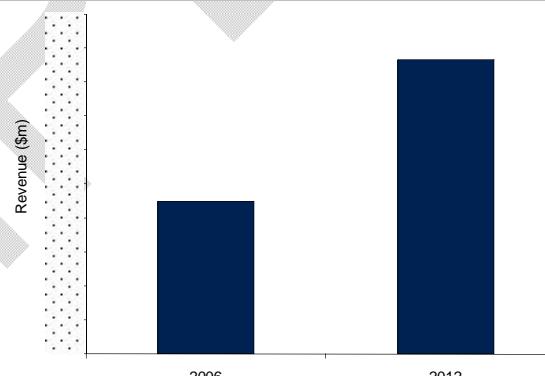


Source: GlobalData, interviews with gas-generator industry experts in China, India, the US, the UK and Brazil

US Contributes around XX% of Total Global Gas-Generator Revenues

The US is by far the largest market for gas gensets globally, and is expected to continue to dominate throughout the forecast period. The market increased from \$XXm in 2006 to \$XXm in 2012, at a CAGR of XX%. High availability of shale gas reserves, resulting in low gas prices, as well as the imposition of stringent exhaust emission norms for diesel, have driven the market for gas gensets in the country, and this trend is expected to continue

Gas-Generator Market, US, Revenue (\$m), 2006 and 2012



Source: GlobalData, interviews with gas-generator industry experts in China, India, US, UK, Brazil

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Introduction

2 Introduction

2.1 Gas Generator, Overview

The generator set (genset) converts mechanical energy into electrical energy, and output is in the form of alternating current. A genset is the combination of a fossil-fuel-powered engine mounted together with an electrical generator.

Though diesel generators are most commonly used, gensets powered by natural gas are increasingly being adopted. The important advantage of natural gas when compared to diesel is its environmental friendliness. Natural gas powered generators emit lower amounts of nitrogen, sulfur and CO₂, and also have an edge over diesel generators in terms of noise and odor. Gas gensets are primarily used for distributed generation purposes, which use an internal combustion engine to convert the gaseous fuel into useful energy.

2.1.1 End-User Classification

Demand from all end-users such as industrial, residential and commercial sectors is covered in analysis, according to availability of data.

2.1.2 Voltage-Wise Classification

Voltage-wise classification of gas-genset revenue has been provided for a select set of countries. The classification is based on the data provided by key primary correspondents and varies from country to country.

2.1.3 Technologies

The report covers gensets powered by natural gas.

Introduction

2.2 GlobalData Report Guidance

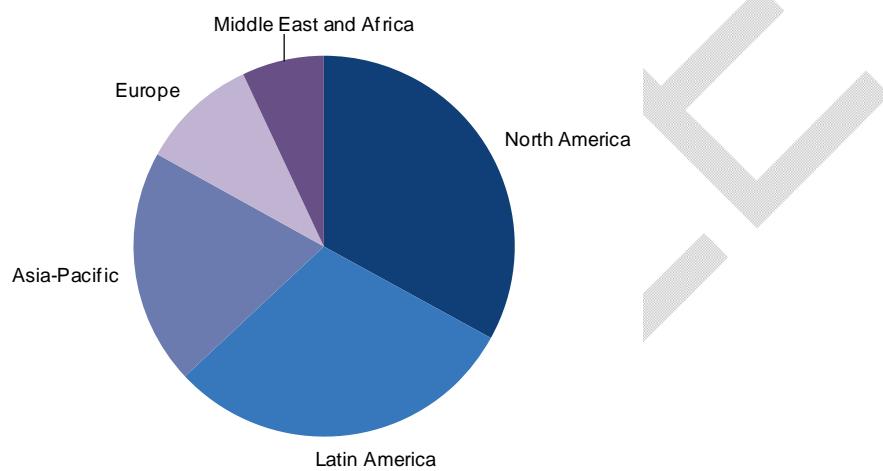
- The report starts with an executive summary capturing the current and future outlook of gas-genset market.
- Chapter two provides an introduction to gas gensets.
- Chapter three introduces the global gas-genset market. This chapter covers global market revenues and the regional segmentation for the gas-genset market. The chapter also discusses the drivers and restraints faced by the genset market.
- Chapters four to nine discuss the power genset market for key countries. The countries covered in these chapters are the US, China, Brazil, the UK, India and Nigeria. Analysis is provided of market revenues, including differentiation by voltage rating, and market shares. Market drivers and restraints are also covered for all of these key countries.

Global Gas-Generator Market

3.1.1 Regional Segmentation of Gas-Generator Market, 2013

The North American region has the highest share, with XX% of the global gas-genset market. Latin America and Asia-Pacific are the next largest, with respective shares of XX% and XX%. Europe and the Middle East hold comparatively lower shares, with XX% and XX% respectively.

Figure 1: Generator Market, Regional Segmentation (%), 2013



Source: GlobalData, interviews with gas-generator industry experts in China, India, US, UK, Brazil

Table 1: Gas-Generator Market, Regional Segmentation (%), 2013

Region	Share (%)
North America	XX
Latin America	XX
Asia-Pacific	XX
Europe	XX
Middle East and Africa	XX

Source: GlobalData, interviews with gas-generator industry experts in China, India, US, UK, Brazil

Global Gas-Generator Market

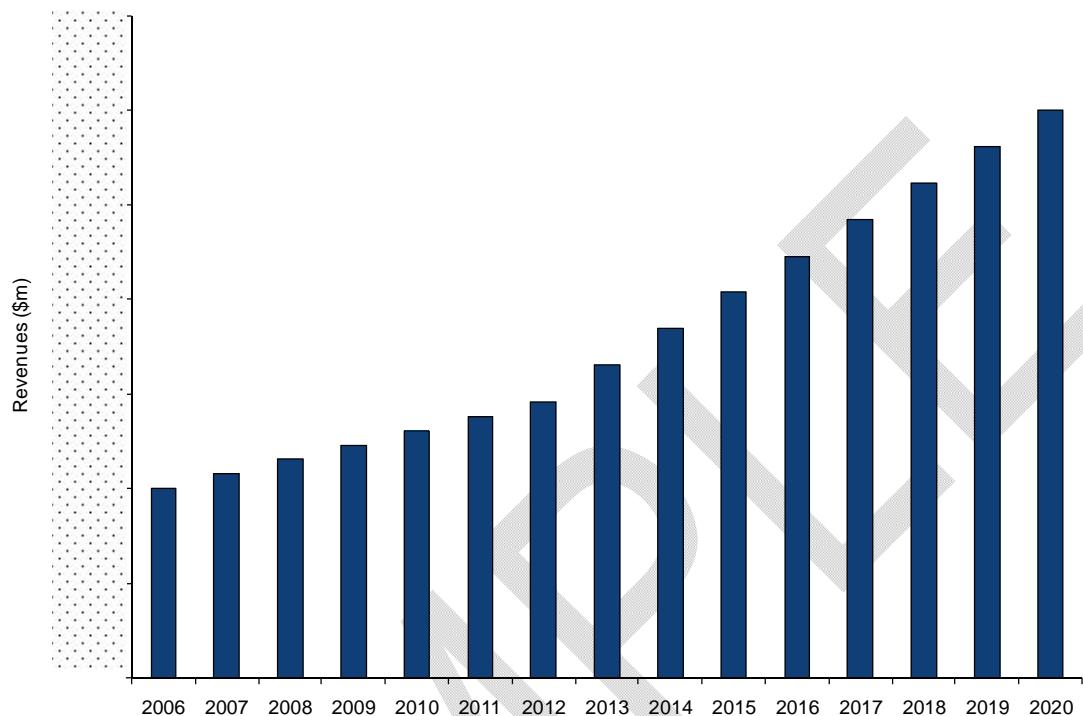
3.2 Global Gas-Generator Market

Globally, the gas-generator market increased from \$XX billion in 2006 to \$XX billion in 2012, at a Compound Annual Growth Rate (CAGR) of XX%. The revenues declined in 2008 and 2009, primarily due to the global economic slowdown, which adversely affected most countries worldwide. The market recovered in 2010, after which it has continued to grow at a steady pace. The US share of the global gas-genset market is the highest, and accounts for approximately XX% of the market. The US gas-genset market is expected to continue to grow in the future, due to the declining gas prices resulting from growing shale gas reserves, and the imposition of stringent emission norms for diesel gensets. China and Brazil are the other XX important countries considered in GlobalData's study, accounting for a cumulative share of around XX%. The Brazilian government's focus on the development of gas-fired capacity and the fact that the country has a huge untapped potential of shale gas reserves is likely to further boost the market for gas gensets. Although China faces an infrastructural bottleneck and also finds export of these products difficult, its gas-genset revenue is also expected to grow rapidly in the future. This is because the Chinese government is investing heavily in ramping up the infrastructural network of the country, including power.

In the forecast period, the global gas-genset market is expected to increase from \$XX billion to \$XX billion, at a CAGR of XX%. The US is expected to maintain its dominating share of the market. China's share is expected to increase from XX% in 2012 to around XX% in 2020, while Brazil's will grow from XX% to XX% during the same period.

Global Gas-Generator Market

Figure 4: Gas-Generator Market, Global, Revenue Forecast (\$m), 2006–2020



Source: GlobalData, interviews with gas-generator industry experts in China, India, US, UK, Brazil

Global Gas-Generator Market**Table 2: Gas-Generator Market, Global, Revenue Forecast (\$m), 2006–2020**

Year	Revenues (\$million)
2006	
2007	
2008	
2009	
2010	
2011	
2012	
2013	
2014	
2015	
2016	
2017	
2018	
2019	
2020	

Source: GlobalData, interviews with gas-generator industry experts in China, India, US, UK, Brazil

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Appendix

10 Appendix

10.1 Market Definitions

10.1.1 Power

The rate of production, transfer, or energy use, usually related to electricity. Measured in watts and often expressed in kilowatts (kW) or Megawatts (MW), it is also known as 'real' or 'active' power.

10.1.2 Installed Capacity

Installed capacity refers to the generator's nameplate capacity as stated by the manufacturer or the maximum rated output of a generator under given conditions. Installed capacity is given in MW on a nameplate physically fixed on the generator.

10.1.3 Electricity Generation

Producing electric energy by transforming other forms of energy. Also refers to the amount of electric energy produced, expressed in Gigawatt hours (GWh).

10.1.4 Thermal Power Plant

A plant in which turbine generators are driven by burning fossil fuels.

10.1.5 Nuclear Power

The electricity generated by the use of the thermal energy released from the fission of nuclear fuel in a reactor.

10.1.6 Renewable Energy Resources

Naturally replenishing energy resources limited in the amount of energy that is available per unit of time. For example, biomass, geothermal, solar, wind can all be termed as renewable resources.

Appendix

10.2 Abbreviations

Table 26: Abbreviations

Full form	Abbreviation
billion cubic meters	bcm
Combined Heat & Power	CHP
Compound Annual Growth Rate	CAGR
Department of Energy	DOE
Economic Community of West African States	ECOWAS
Environmental Protection Agency	EPA
Federal Energy Regulatory Commission	FERC
Free Trade Agreement	FTA
Generator set	genset
Gigawatt	GW
Gigawatt hours	GWh
Gross Domestic Product	GDP
kilovolt-amperes	kVA
kilowatt	kW
Krishna Godavari	KG
Megawatt	MW
million British thermal units	mmbtu
million cubic feet	mmcf
Ministry of Mines and Energy	MME
Particulate Matter	PM
Power Holding Company of Nigeria	PHCN
trillion cubic feet	tcf

Source: GlobalData

Appendix

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Appendix

10.4 Methodology

GlobalData's dedicated research and analysis teams consist of experienced professionals with a pedigree in marketing and market research, consulting backgrounds in the energy industry, and advanced levels of statistical expertise.

GlobalData adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Strategic and Competitive Intelligence Professionals (www.scip.org).

All GlobalData's databases are continuously updated and revised. The following methodology has been followed for this report.

10.4.1 Coverage

The report provides a detailed analysis of the gas-generator market for some of the key countries at the global level: the US, the UK, India, Brazil, China and Nigeria.

The report provides:

- Historical (2006–2012) and forecast data (2013–2020) on market revenues and segmentation of market revenues by voltage level is given
- Gas-generator market drivers and restraints for these countries.
- Market share of the key players for all the countries.

10.4.2 Secondary Research

The research process begins with exhaustive secondary research on internal and external sources to source qualitative and quantitative information relating to each market.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and US Securities and Exchanges Commission filings.
- Industry trade journals and other literature.
- Internal and external proprietary databases.
- National government documents, statistical databases and market reports.
- News articles, press releases and web-casts specific to the companies operating in the market.

Appendix

10.4.3 Primary Research

GlobalData conducts extensive primary interviews with industry participants and commentators in order to validate its data. A typical research interview fulfills the following functions:

- It provides first-hand information on the market size, market trends, growth trends, competitive landscape, and future outlook.
- Helps in validating and strengthening the secondary research findings.
- Further develops the team's expertise and market understanding.
- Primary research involves e-mail interactions, telephonic interviews as well as face-to-face interviews for each market, category, segment and sub-segment across geographies.
- The participants who typically take part in such a process include, but are not limited to:
- Industry participants: CEOs, VPs, business development managers, market intelligence managers and national sales managers.
- Outside experts: Investment bankers, valuation experts, research analysts and key opinion leaders specializing in the alternative energy industry.

10.5 Disclaimer

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