

Global Main Engine Shaft Generator Market Research Report 2026(Status and Outlook)

<https://marketpublishers.com/r/G24A9E961036EN.html>

Date: March 2026

Pages: 156

Price: US\$ 2,980.00 (Single User License)

ID: G24A9E961036EN

Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Main Engine Shaft Generator competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global market sales volume of main engine shaft generators was approximately 960 units, with an average unit price of approximately US\$115,000 and an industry gross profit margin of approximately 20%?28%. Main engine shaft generators are a type of marine propulsion-electric integrated system that relies on the rotational speed of the ship's main engine crankshaft/intermediate shaft and drives a synchronous generator through a gearbox, coupling, or variable speed constant frequency (VSG) power conversion system to output electricity. They are used to replace diesel auxiliary generators for power generation under navigation conditions, providing a stable energy source for the ship's loads (HVAC, lighting, living quarters), propulsion auxiliary systems (pumps, compressors, hydraulic stations), and navigation electronic equipment. Typical rated power range is 900kW?5,500kW, power factor is 0.8?0.95, efficiency can reach 94%?97%, output can be 400/440/690V, frequency supports direct 50/60Hz or VSG constant frequency mode; to adapt to variable speed navigation, some systems are equipped with reluctance speed compensation and active grid-connected inverter modules to maintain stable power quality within the main engine speed range of 68?110%. Typical 13,000?18,000 TEU container ships use one main engine shaft generator system per ship, cruise ships usually have two parallel systems due to large loads, offshore platform supply vessels (PSV/OSV) are equipped with 1?3 systems under DP2/DP3 redundancy requirements, and LNG dual-fuel ships have a significantly higher configuration rate due to the need for cooling/reliquefaction loads. Supply Situation Upstream raw materials for the main shaft generator system include high-energy-product rare-earth permanent magnets (Nd-Fe-B), high-

permeability silicon steel sheets, enameled copper wire and Class F insulation materials, marine-grade corrosion-resistant structural steel (A/B/AH36), large spherical roller bearings, and SiC or IGBT power semiconductor modules. Raw material costs account for approximately 60%–68% of the total system cost, with permanent magnets and electromagnetic copper wire exhibiting the most significant cost fluctuations. Major suppliers include Hitachi Metals, Vacuumschmelze, Nidec, and SKF Infineon. Manufacturer Characteristics Wartsila (delivering approximately 90 shaft generators or related complete systems annually) has established an engineering support advantage in the medium-to-high power cruise ship and 16,000+ TEU container ship sectors. STAMFORD is known for its modular synchronous generators and standard shipyard configurations, primarily targeting the medium-sized bulk carrier/tanker market. The Switch and WE Tech specialize in integrated permanent magnet direct drive + SiC inverter systems, holding a leading position in the pre-positioning of LNG and ammonia fuel in Northern Europe. Example In August 2025, The Switch secured a new order to supply 12 PMM2000M permanent magnet shaft generators, each providing 4210 kW of power at 50 rpm. These highly efficient and reliable shaft generators will be installed on a new 18,200 TEU container ship under construction at a shipyard in South Korea. On average, each generator can reduce CO₂ emissions by up to 5,000 tons over the ship's entire lifespan, or 250 tons per year. Applications Shaft-driven generators have a wide range of applications, precisely matching the core needs of different ship types. Container ships and bulk carriers have the highest application rates, driven by fuel efficiency and carbon emission compliance. Oil/crude/chemical tanker customers achieve efficient operation by replacing auxiliary engines during navigation. Cruise ships and large Ro-Pax ferries use shaft-driven generators to meet the continuous power demands of their large hotel loads. PSV/OSV offshore platforms account for approximately 10%, mainly used for dynamic positioning and peak shaving. Typical customers include Arklow and Maersk in the container ship sector, MOL in the bulk carrier and oil tanker sector, Carnival in the cruise ship sector, Equinor and Saipem in the offshore vessel sector, and Hyundai Heavy Industries in the newbuilding assembly sector. Technology Trends Technology evolution directions include: permanent magnet high torque density motors, variable speed constant frequency (VSG) active energy management, deep integration of SiC-based power electronics, integrated collaboration between propulsion control systems and power grid management systems (EMS), and intelligent switching between shaft-driven generators, batteries, and shore power. Future typical route model forecasts indicate that adopting a VSG+ energy management system can further reduce fuel consumption by 7%–14% under navigation conditions, while extending the expected lifespan of auxiliary engines by 20%–35%. Market Influencing Factors Following the implementation of the EU ETS, shipping costs increased by an average of 3.7% in 2024, with container shipping ETS

freight prices rising by 1% to 5%. The EU FuelEU Maritime's gradual reduction of ship fuel carbon intensity (2025-2034), coupled with IMO CII (Carbon Intensity Index) and EEXI (Energy Efficiency Index) assessments, has made main engine shaft generator systems a direct factor for shipowners to improve their ratings, and exempts ships equipped with high-efficiency shaft generators from some carbon emission taxes. Compared to the high-cost path of relying on low-sulfur fuel oil or methanol/ammonia alternative fuels, "stopping auxiliary engines during navigation" is a current fleet emission reduction method that can be implemented immediately and at a controllable cost. As a result, the penetration rate of new shipbuilding will increase from 28% in 2019 to about 57% in 2024. In addition, the conversion demand brought about by about 7,800 convertible ships worldwide will lead to medium-to-high-speed growth in the market in the future.

The global Main Engine Shaft Generator market size was estimated at USD 110.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Main Engine Shaft Generator market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Main Engine Shaft Generator market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Main Engine Shaft Generator market.

Global Main Engine Shaft Generator Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Wartsila
RENK
ABB
STAMFORD
The Switch
WE Tech
SMDERI
BERG Propulsion
Kongsberg
C&A Electric
Siemens
Hitachi
ZEME
VEM
CRRC

Market Segmentation (by Type)

PTO
PTI
PTH

Market Segmentation (by Application)

Container Ships
LNG Carriers
Bulk Carriers
Oil Tankers

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Main Engine Shaft Generator Market
Overview of the regional outlook of the Main Engine Shaft Generator Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Main Engine Shaft Generator Market and its likely evolution in the short to mid-term,

and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Main Engine Shaft Generator, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Main Engine Shaft Generator
- 1.2 Key Market Segments
 - 1.2.1 Main Engine Shaft Generator Segment by Type
 - 1.2.2 Main Engine Shaft Generator Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 MAIN ENGINE SHAFT GENERATOR MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Main Engine Shaft Generator Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Main Engine Shaft Generator Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 MAIN ENGINE SHAFT GENERATOR MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Main Engine Shaft Generator Product Life Cycle
- 3.3 Global Main Engine Shaft Generator Sales by Manufacturers (2020-2025)
- 3.4 Global Main Engine Shaft Generator Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Main Engine Shaft Generator Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Main Engine Shaft Generator Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Main Engine Shaft Generator Market Competitive Situation and Trends
 - 3.8.1 Main Engine Shaft Generator Market Concentration Rate
 - 3.8.2 Global 5 and 10 Largest Main Engine Shaft Generator Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 MAIN ENGINE SHAFT GENERATOR INDUSTRY CHAIN ANALYSIS

4.1 Main Engine Shaft Generator Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF MAIN ENGINE SHAFT GENERATOR MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Main Engine Shaft Generator Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Main Engine Shaft Generator Market

5.7 ESG Ratings of Leading Companies

6 MAIN ENGINE SHAFT GENERATOR MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Main Engine Shaft Generator Sales Market Share by Type (2020-2025)

6.3 Global Main Engine Shaft Generator Market Size by Type (2020-2025)

6.4 Global Main Engine Shaft Generator Price by Type (2020-2025)

7 MAIN ENGINE SHAFT GENERATOR MARKET SEGMENTATION BY

APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Main Engine Shaft Generator Market Sales by Application (2020-2025)
- 7.3 Global Main Engine Shaft Generator Market Size (M USD) by Application (2020-2025)
- 7.4 Global Main Engine Shaft Generator Sales Growth Rate by Application (2020-2025)

8 MAIN ENGINE SHAFT GENERATOR MARKET SALES BY REGION

- 8.1 Global Main Engine Shaft Generator Sales by Region
 - 8.1.1 Global Main Engine Shaft Generator Sales by Region
 - 8.1.2 Global Main Engine Shaft Generator Sales Market Share by Region
- 8.2 Global Main Engine Shaft Generator Market Size by Region
 - 8.2.1 Global Main Engine Shaft Generator Market Size by Region
 - 8.2.2 Global Main Engine Shaft Generator Market Size by Region
- 8.3 North America
 - 8.3.1 North America Main Engine Shaft Generator Sales by Country
 - 8.3.2 North America Main Engine Shaft Generator Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview
- 8.4 Europe
 - 8.4.1 Europe Main Engine Shaft Generator Sales by Country
 - 8.4.2 Europe Main Engine Shaft Generator Market Size by Country
 - 8.4.3 Germany Market Overview
 - 8.4.4 France Market Overview
 - 8.4.5 U.K. Market Overview
 - 8.4.6 Italy Market Overview
 - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific Main Engine Shaft Generator Sales by Region
 - 8.5.2 Asia Pacific Main Engine Shaft Generator Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview
 - 8.5.6 India Market Overview
 - 8.5.7 Southeast Asia Market Overview
- 8.6 South America

- 8.6.1 South America Main Engine Shaft Generator Sales by Country
- 8.6.2 South America Main Engine Shaft Generator Market Size by Country
- 8.6.3 Brazil Market Overview
- 8.6.4 Argentina Market Overview
- 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Main Engine Shaft Generator Sales by Region
 - 8.7.2 Middle East and Africa Main Engine Shaft Generator Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 MAIN ENGINE SHAFT GENERATOR MARKET PRODUCTION BY REGION

- 9.1 Global Production of Main Engine Shaft Generator by Region(2020-2025)
- 9.2 Global Main Engine Shaft Generator Revenue Market Share by Region (2020-2025)
- 9.3 Global Main Engine Shaft Generator Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Main Engine Shaft Generator Production
 - 9.4.1 North America Main Engine Shaft Generator Production Growth Rate (2020-2025)
 - 9.4.2 North America Main Engine Shaft Generator Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Main Engine Shaft Generator Production
 - 9.5.1 Europe Main Engine Shaft Generator Production Growth Rate (2020-2025)
 - 9.5.2 Europe Main Engine Shaft Generator Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Main Engine Shaft Generator Production (2020-2025)
 - 9.6.1 Japan Main Engine Shaft Generator Production Growth Rate (2020-2025)
 - 9.6.2 Japan Main Engine Shaft Generator Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Main Engine Shaft Generator Production (2020-2025)
 - 9.7.1 China Main Engine Shaft Generator Production Growth Rate (2020-2025)
 - 9.7.2 China Main Engine Shaft Generator Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Wartsila

10.1.1 Wartsila Basic Information

10.1.2 Wartsila Main Engine Shaft Generator Product Overview

10.1.3 Wartsila Main Engine Shaft Generator Product Market Performance

10.1.4 Wartsila Business Overview

10.1.5 Wartsila SWOT Analysis

10.1.6 Wartsila Recent Developments

10.2 RENK

10.2.1 RENK Basic Information

10.2.2 RENK Main Engine Shaft Generator Product Overview

10.2.3 RENK Main Engine Shaft Generator Product Market Performance

10.2.4 RENK Business Overview

10.2.5 RENK SWOT Analysis

10.2.6 RENK Recent Developments

10.3 ABB

10.3.1 ABB Basic Information

10.3.2 ABB Main Engine Shaft Generator Product Overview

10.3.3 ABB Main Engine Shaft Generator Product Market Performance

10.3.4 ABB Business Overview

10.3.5 ABB SWOT Analysis

10.3.6 ABB Recent Developments

10.4 STAMFORD

10.4.1 STAMFORD Basic Information

10.4.2 STAMFORD Main Engine Shaft Generator Product Overview

10.4.3 STAMFORD Main Engine Shaft Generator Product Market Performance

10.4.4 STAMFORD Business Overview

10.4.5 STAMFORD Recent Developments

10.5 The Switch

10.5.1 The Switch Basic Information

10.5.2 The Switch Main Engine Shaft Generator Product Overview

10.5.3 The Switch Main Engine Shaft Generator Product Market Performance

10.5.4 The Switch Business Overview

10.5.5 The Switch Recent Developments

10.6 WE Tech

10.6.1 WE Tech Basic Information

10.6.2 WE Tech Main Engine Shaft Generator Product Overview

10.6.3 WE Tech Main Engine Shaft Generator Product Market Performance

10.6.4 WE Tech Business Overview

- 10.6.5 WE Tech Recent Developments
- 10.7 SMDERI
 - 10.7.1 SMDERI Basic Information
 - 10.7.2 SMDERI Main Engine Shaft Generator Product Overview
 - 10.7.3 SMDERI Main Engine Shaft Generator Product Market Performance
 - 10.7.4 SMDERI Business Overview
 - 10.7.5 SMDERI Recent Developments
- 10.8 BERG Propulsion
 - 10.8.1 BERG Propulsion Basic Information
 - 10.8.2 BERG Propulsion Main Engine Shaft Generator Product Overview
 - 10.8.3 BERG Propulsion Main Engine Shaft Generator Product Market Performance
 - 10.8.4 BERG Propulsion Business Overview
 - 10.8.5 BERG Propulsion Recent Developments
- 10.9 Kongsberg
 - 10.9.1 Kongsberg Basic Information
 - 10.9.2 Kongsberg Main Engine Shaft Generator Product Overview
 - 10.9.3 Kongsberg Main Engine Shaft Generator Product Market Performance
 - 10.9.4 Kongsberg Business Overview
 - 10.9.5 Kongsberg Recent Developments
- 10.10 CandA Electric
 - 10.10.1 CandA Electric Basic Information
 - 10.10.2 CandA Electric Main Engine Shaft Generator Product Overview
 - 10.10.3 CandA Electric Main Engine Shaft Generator Product Market Performance
 - 10.10.4 CandA Electric Business Overview
 - 10.10.5 CandA Electric Recent Developments
- 10.11 Siemens
 - 10.11.1 Siemens Basic Information
 - 10.11.2 Siemens Main Engine Shaft Generator Product Overview
 - 10.11.3 Siemens Main Engine Shaft Generator Product Market Performance
 - 10.11.4 Siemens Business Overview
 - 10.11.5 Siemens Recent Developments
- 10.12 Hitachi
 - 10.12.1 Hitachi Basic Information
 - 10.12.2 Hitachi Main Engine Shaft Generator Product Overview
 - 10.12.3 Hitachi Main Engine Shaft Generator Product Market Performance
 - 10.12.4 Hitachi Business Overview
 - 10.12.5 Hitachi Recent Developments
- 10.13 ZEME
 - 10.13.1 ZEME Basic Information

- 10.13.2 ZEME Main Engine Shaft Generator Product Overview
- 10.13.3 ZEME Main Engine Shaft Generator Product Market Performance
- 10.13.4 ZEME Business Overview
- 10.13.5 ZEME Recent Developments
- 10.14 VEM
 - 10.14.1 VEM Basic Information
 - 10.14.2 VEM Main Engine Shaft Generator Product Overview
 - 10.14.3 VEM Main Engine Shaft Generator Product Market Performance
 - 10.14.4 VEM Business Overview
 - 10.14.5 VEM Recent Developments
- 10.15 CRRC
 - 10.15.1 CRRC Basic Information
 - 10.15.2 CRRC Main Engine Shaft Generator Product Overview
 - 10.15.3 CRRC Main Engine Shaft Generator Product Market Performance
 - 10.15.4 CRRC Business Overview
 - 10.15.5 CRRC Recent Developments

11 MAIN ENGINE SHAFT GENERATOR MARKET FORECAST BY REGION

- 11.1 Global Main Engine Shaft Generator Market Size Forecast
- 11.2 Global Main Engine Shaft Generator Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Main Engine Shaft Generator Market Size Forecast by Country
 - 11.2.3 Asia Pacific Main Engine Shaft Generator Market Size Forecast by Region
 - 11.2.4 South America Main Engine Shaft Generator Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of Main Engine Shaft Generator by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

- 12.1 Global Main Engine Shaft Generator Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Main Engine Shaft Generator by Type (2026-2035)
 - 12.1.2 Global Main Engine Shaft Generator Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Main Engine Shaft Generator by Type (2026-2035)
- 12.2 Global Main Engine Shaft Generator Market Forecast by Application (2026-2035)
 - 12.2.1 Global Main Engine Shaft Generator Sales (K Units) Forecast by Application
 - 12.2.2 Global Main Engine Shaft Generator Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Main Engine Shaft Generator Market Size by Type (M USD)

Table 4. Global Main Engine Shaft Generator Market Size by Application

Table 5. Main Engine Shaft Generator Market Size Comparison by Region (M USD)

Table 6. Global Main Engine Shaft Generator Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Main Engine Shaft Generator Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Main Engine Shaft Generator Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Main Engine Shaft Generator Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Main Engine Shaft Generator as of 2025)

Table 11. Global Market Main Engine Shaft Generator Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Main Engine Shaft Generator Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Main Engine Shaft Generator Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Main Engine Shaft Generator Sales by Type (K Units)

Table 27. Global Main Engine Shaft Generator Market Size by Type (M USD)

Table 28. Global Main Engine Shaft Generator Sales (K Units) by Type (2020-2025)

Table 29. Global Main Engine Shaft Generator Sales Market Share by Type (2020-2025)

Table 30. Global Main Engine Shaft Generator Market Size (M USD) by Type (2020-2025)

Table 31. Global Main Engine Shaft Generator Market Share by Type (2020-2025)

Table 32. Global Main Engine Shaft Generator Price (USD/Unit) by Type (2020-2025)

Table 33. Global Main Engine Shaft Generator Sales (K Units) by Application

Table 34. Global Main Engine Shaft Generator Market Size by Application

Table 35. Global Main Engine Shaft Generator Sales by Application (2020-2025) & (K Units)

Table 36. Global Main Engine Shaft Generator Sales Market Share by Application (2020-2025)

Table 37. Global Main Engine Shaft Generator Market Size by Application (2020-2025) & (M USD)

Table 38. Global Main Engine Shaft Generator Market Share by Application (2020-2025)

Table 39. Global Main Engine Shaft Generator Sales Growth Rate by Application (2020-2025)

Table 40. Global Main Engine Shaft Generator Sales by Region (2020-2025) & (K Units)

Table 41. Global Main Engine Shaft Generator Sales Market Share by Region (2020-2025)

Table 42. Global Main Engine Shaft Generator Market Size by Region (2020-2025) & (M USD)

Table 43. Global Main Engine Shaft Generator Market Size by Region (2020-2025)

Table 44. North America Main Engine Shaft Generator Sales by Country (2020-2025) & (K Units)

Table 45. North America Main Engine Shaft Generator Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Main Engine Shaft Generator Sales by Country (2020-2025) & (K Units)

Table 47. Europe Main Engine Shaft Generator Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Main Engine Shaft Generator Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific Main Engine Shaft Generator Market Size by Region (2020-2025) & (M USD)

Table 50. South America Main Engine Shaft Generator Sales by Country (2020-2025) & (K Units)

- Table 51. South America Main Engine Shaft Generator Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Main Engine Shaft Generator Sales by Region (2020-2025) & (K Units)
- Table 53. Middle East and Africa Main Engine Shaft Generator Market Size by Region (2020-2025) & (M USD)
- Table 54. Global Main Engine Shaft Generator Production (K Units) by Region(2020-2025)
- Table 55. Global Main Engine Shaft Generator Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global Main Engine Shaft Generator Revenue Market Share by Region (2020-2025)
- Table 57. Global Main Engine Shaft Generator Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 58. North America Main Engine Shaft Generator Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 59. Europe Main Engine Shaft Generator Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 60. Japan Main Engine Shaft Generator Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 61. China Main Engine Shaft Generator Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 62. Wartsila Basic Information
- Table 63. Wartsila Main Engine Shaft Generator Product Overview
- Table 64. Wartsila Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 65. Wartsila Business Overview
- Table 66. Wartsila SWOT Analysis
- Table 67. Wartsila Recent Developments
- Table 68. RENK Basic Information
- Table 69. RENK Main Engine Shaft Generator Product Overview
- Table 70. RENK Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 71. RENK Business Overview
- Table 72. RENK SWOT Analysis
- Table 73. RENK Recent Developments
- Table 74. ABB Basic Information
- Table 75. ABB Main Engine Shaft Generator Product Overview
- Table 76. ABB Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price

(USD/Unit) and Gross Margin (2020-2025)

Table 77. ABB Business Overview

Table 78. ABB SWOT Analysis

Table 79. ABB Recent Developments

Table 80. STAMFORD Basic Information

Table 81. STAMFORD Main Engine Shaft Generator Product Overview

Table 82. STAMFORD Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. STAMFORD Business Overview

Table 84. STAMFORD Recent Developments

Table 85. The Switch Basic Information

Table 86. The Switch Main Engine Shaft Generator Product Overview

Table 87. The Switch Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. The Switch Business Overview

Table 89. The Switch Recent Developments

Table 90. WE Tech Basic Information

Table 91. WE Tech Main Engine Shaft Generator Product Overview

Table 92. WE Tech Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. WE Tech Business Overview

Table 94. WE Tech Recent Developments

Table 95. SMDERI Basic Information

Table 96. SMDERI Main Engine Shaft Generator Product Overview

Table 97. SMDERI Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 98. SMDERI Business Overview

Table 99. SMDERI Recent Developments

Table 100. BERG Propulsion Basic Information

Table 101. BERG Propulsion Main Engine Shaft Generator Product Overview

Table 102. BERG Propulsion Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 103. BERG Propulsion Business Overview

Table 104. BERG Propulsion Recent Developments

Table 105. Kongsberg Basic Information

Table 106. Kongsberg Main Engine Shaft Generator Product Overview

Table 107. Kongsberg Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. Kongsberg Business Overview

- Table 109. Kongsberg Recent Developments
- Table 110. CandA Electric Basic Information
- Table 111. CandA Electric Main Engine Shaft Generator Product Overview
- Table 112. CandA Electric Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 113. CandA Electric Business Overview
- Table 114. CandA Electric Recent Developments
- Table 115. Siemens Basic Information
- Table 116. Siemens Main Engine Shaft Generator Product Overview
- Table 117. Siemens Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 118. Siemens Business Overview
- Table 119. Siemens Recent Developments
- Table 120. Hitachi Basic Information
- Table 121. Hitachi Main Engine Shaft Generator Product Overview
- Table 122. Hitachi Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 123. Hitachi Business Overview
- Table 124. Hitachi Recent Developments
- Table 125. ZEME Basic Information
- Table 126. ZEME Main Engine Shaft Generator Product Overview
- Table 127. ZEME Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 128. ZEME Business Overview
- Table 129. ZEME Recent Developments
- Table 130. VEM Basic Information
- Table 131. VEM Main Engine Shaft Generator Product Overview
- Table 132. VEM Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 133. VEM Business Overview
- Table 134. VEM Recent Developments
- Table 135. CRRC Basic Information
- Table 136. CRRC Main Engine Shaft Generator Product Overview
- Table 137. CRRC Main Engine Shaft Generator Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 138. CRRC Business Overview
- Table 139. CRRC Recent Developments
- Table 140. Global Main Engine Shaft Generator Sales Forecast by Region (2026-2035) & (K Units)

Table 141. Global Main Engine Shaft Generator Market Size Forecast by Region (2026-2035) & (M USD)

Table 142. North America Main Engine Shaft Generator Sales Forecast by Country (2026-2035) & (K Units)

Table 143. North America Main Engine Shaft Generator Market Size Forecast by Country (2026-2035) & (M USD)

Table 144. Europe Main Engine Shaft Generator Sales Forecast by Country (2026-2035) & (K Units)

Table 145. Europe Main Engine Shaft Generator Market Size Forecast by Country (2026-2035) & (M USD)

Table 146. Asia Pacific Main Engine Shaft Generator Sales Forecast by Region (2026-2035) & (K Units)

Table 147. Asia Pacific Main Engine Shaft Generator Market Size Forecast by Region (2026-2035) & (M USD)

Table 148. South America Main Engine Shaft Generator Sales Forecast by Country (2026-2035) & (K Units)

Table 149. South America Main Engine Shaft Generator Market Size Forecast by Country (2026-2035) & (M USD)

Table 150. Middle East and Africa Main Engine Shaft Generator Sales Forecast by Country (2026-2035) & (Units)

Table 151. Middle East and Africa Main Engine Shaft Generator Market Size Forecast by Country (2026-2035) & (M USD)

Table 152. Global Main Engine Shaft Generator Sales Forecast by Type (2026-2035) & (K Units)

Table 153. Global Main Engine Shaft Generator Market Size Forecast by Type (2026-2035) & (M USD)

Table 154. Global Main Engine Shaft Generator Price Forecast by Type (2026-2035) & (USD/Unit)

Table 155. Global Main Engine Shaft Generator Sales (K Units) Forecast by Application (2026-2035)

Table 156. Global Main Engine Shaft Generator Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Main Engine Shaft Generator
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Main Engine Shaft Generator Market Size (M USD), 2025-2035
- Figure 5. Global Main Engine Shaft Generator Market Size (M USD) (2020-2035)
- Figure 6. Global Main Engine Shaft Generator Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Main Engine Shaft Generator Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Main Engine Shaft Generator Product Life Cycle
- Figure 13. Main Engine Shaft Generator Sales Share by Manufacturers in 2025
- Figure 14. Global Main Engine Shaft Generator Revenue Share by Manufacturers in 2025
- Figure 15. Main Engine Shaft Generator Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Main Engine Shaft Generator Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Main Engine Shaft Generator Revenue in 2025
- Figure 18. Industry Chain Map of Main Engine Shaft Generator
- Figure 19. Global Main Engine Shaft Generator Market PEST Analysis
- Figure 20. Global Main Engine Shaft Generator Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Main Engine Shaft Generator Market Share by Type
- Figure 27. Sales Market Share of Main Engine Shaft Generator by Type (2020-2025)
- Figure 28. Sales Market Share of Main Engine Shaft Generator by Type in 2025
- Figure 29. Market Share of Main Engine Shaft Generator by Type (2020-2025)
- Figure 30. Market Share of Main Engine Shaft Generator by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

- Figure 32. Global Main Engine Shaft Generator Market Share by Application
- Figure 33. Global Main Engine Shaft Generator Sales Market Share by Application (2020-2025)
- Figure 34. Global Main Engine Shaft Generator Sales Market Share by Application in 2025
- Figure 35. Global Main Engine Shaft Generator Market Share by Application (2020-2025)
- Figure 36. Global Main Engine Shaft Generator Market Share by Application in 2025
- Figure 37. Global Main Engine Shaft Generator Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Main Engine Shaft Generator Sales Market Share by Region (2020-2025)
- Figure 39. Global Main Engine Shaft Generator Market Size by Region (2020-2025)
- Figure 40. North America Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Main Engine Shaft Generator Sales Market Share by Country in 2024
- Figure 43. North America Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Main Engine Shaft Generator Market Size by Country in 2024
- Figure 45. U.S. Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Main Engine Shaft Generator Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Main Engine Shaft Generator Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Main Engine Shaft Generator Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Main Engine Shaft Generator Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 52. Europe Main Engine Shaft Generator Sales Market Share by Country in 2024
- Figure 53. Europe Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Main Engine Shaft Generator Market Size by Country in 2024

Figure 55. Germany Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Main Engine Shaft Generator Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Main Engine Shaft Generator Sales Market Share by Region in 2024

Figure 67. Asia Pacific Main Engine Shaft Generator Market Size by Region in 2024

Figure 68. China Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

- Figure 75. India Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 76. Southeast Asia Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 77. Southeast Asia Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 78. South America Main Engine Shaft Generator Sales and Growth Rate (K Units)
- Figure 79. South America Main Engine Shaft Generator Sales Market Share by Country in 2024
- Figure 80. South America Main Engine Shaft Generator Market Size and Growth Rate (M USD)
- Figure 81. South America Main Engine Shaft Generator Market Size by Country in 2024
- Figure 82. Brazil Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 83. Brazil Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 84. Argentina Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 85. Argentina Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 86. Columbia Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 87. Columbia Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 88. Middle East and Africa Main Engine Shaft Generator Sales and Growth Rate (K Units)
- Figure 89. Middle East and Africa Main Engine Shaft Generator Sales Market Share by Region in 2024
- Figure 90. Middle East and Africa Main Engine Shaft Generator Market Size and Growth Rate (M USD)
- Figure 91. Middle East and Africa Main Engine Shaft Generator Market Size by Region in 2024
- Figure 92. Saudi Arabia Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)
- Figure 93. Saudi Arabia Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 94. UAE Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Main Engine Shaft Generator Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Main Engine Shaft Generator Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Main Engine Shaft Generator Production Market Share by Region (2020-2025)

Figure 103. North America Main Engine Shaft Generator Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Main Engine Shaft Generator Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Main Engine Shaft Generator Production (K Units) Growth Rate (2020-2025)

Figure 106. China Main Engine Shaft Generator Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Main Engine Shaft Generator Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Main Engine Shaft Generator Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Main Engine Shaft Generator Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Main Engine Shaft Generator Market Share Forecast by Type (2026-2035)

Figure 111. Global Main Engine Shaft Generator Sales Forecast by Application (2026-2035)

Figure 112. Global Main Engine Shaft Generator Market Share Forecast by Application (2026-2035)

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