

Asia Pacific Generator Sales Market by Fuel Type (Diesel, Gas), Power Rating (5000kVA), Application (Standby, Continuous, Peak Shaving), End-User, Country - Forecast to 2025

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Abstracts

“The Asia Pacific generator sales market is projected to grow at a CAGR of 5.1% from 2020 to 2025.”

The Asia Pacific generator sales market size is projected to reach USD 8.8 billion by 2025 from an estimated USD 6.8 billion in 2020, at a CAGR of 5.1% during the forecast period. Increasing requirement of hybrid generators, bi-fuel, and inverter generators is creating demand opportunities for the generator sales industry in the Asia Pacific region.

Also, increasing demand for uninterrupted & reliable power supply in several industries is driving the generator sales market in the Asia Pacific region. However, the growing adoption of energy storage technologies and renewable energy sources hinder the growth of generators in the Asia Pacific region.

“The industrial segment, by the end user, is expected to be the largest and the fastest-growing market from 2020 to 2025.”

Industrial account for the largest share in the Asia Pacific generator sales market in 2019. The adoption of power backup solutions during the peak demand period to reduce the demand-supply gap in remote areas drive the growth of the market in the industrial sector.

The industrial end-user segment includes utilities/power generation, oil & gas, and other

industries. Other industries include mining, marine, chemical, military, and manufacturing industries. Industrial generators are developed to ensure that there is a continuous supply of power in the event of power failure from the grid system. Thus, such generators guarantee an efficient performance of the equipment during the non-availability of electric supply. Moreover, diesel generators are used widely in mining operations all over the world. They provide over 70% of all the power needed in mining operations by heavy-duty equipment, such as excavating machinery, drillers, conveyor belts, and cranes.

Developing countries, such as China, India, and Thailand, are witnessing rapid industrialization and have introduced favorable policies to support industrial growth, including adequate power supply. Such developments are expected to offer lucrative opportunities for the generator sales market in the Asia Pacific region in the near future.

“The gas segment, by fuel, is expected to be the fastest-growing market from 2020 to 2025.”

Natural gas fuel is growing owing to the expansion of the gas distribution network in emerging economies. Also, natural gas is used widely as an efficient source to power both emergency and portable generators and regarded as one of the most affordable and effective fuels among non-renewable resources for power generation. Also, natural gas generators are cheaper and more environment-friendly compared to diesel generators. In comparison to oil and coal, the emissions of sulfur, nitrogen, and carbon dioxide (a greenhouse gas) are considerably lower in the case of gas gensets. Such features of gas gensets, along with the development of gas distribution networks, are expected to motivate the end-users to install gas generators, which would drive the growth of the gas generator sales market in Asia Pacific.

“Cambodia: The fastest-growing country in the Asia Pacific generator sales industry.”

The country is developing into the fastest-growing end-market for energy, power, and technologies. Also, rapid economic growth and tariff reduction policy are driving the growth of the generator sales market in Cambodia. According to the International Trade Center, Cambodia has reduced 50% of the tariff lines in 2015 and has eliminated 90% tariff lines in 2017. This has promoted free trade movement within the country. With a favorable tariff reduction policy, the country is also focusing on installing power plants for the reliable supply of electricity. However, Cambodia, on an average, records 22% of T&D losses each year due to lack of transmission network, an unreliable supply from a local grid. Thus, the utility companies use generators in remote areas during the peak

demand period to reduce the demand-supply gap. Therefore, all these factors drive the demand for generator sales in the Asia Pacific region.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 60%, Tier 2- 25%, and Tier 3- 15%

By Designation: C-Level- 35%, Director Level- 25%, and Others- 40%

By Country: India - 40%, Thailand - 30%, China - 10%, and Rest of Asia Pacific - 20%

*Others include sales managers, engineers, and regional managers.

Rest of Asia Pacific includes Australia, Japan, Indonesia, South Korea, Laos, Cambodia, Myanmar, Vietnam, Pakistan, and Bangladesh

Note: Tier 1 Company—Revenue > USD 5 billion, Tier 2 Company—Revenue between USD 1 and USD 5 billion, and Tier 3 Company—Revenue

The Asia Pacific generator sales market is dominated by a few major players that have an extensive country presence such as Caterpillar (US), Cummins (US), Generac (US), Wärtsilä (Finland), Mitsubishi Heavy Industries (Japan), Rolls-Royce Holdings (UK), Yanmar (Japan), Siemens (Germany), Weichai Group (China), and Sterling & Wilson (India).

Research Coverage:

The report defines, describes, and forecasts the Asia Pacific generator sales market, by end-user, power rating, application, fuel, and country. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market, which include the analysis of the competitive

landscape, market dynamics, market estimates in terms of value and volume, and future trends in the Asia Pacific generator sales market.

Why Buy this Report?

1. The report identifies and addresses the key markets for the generator sales operations and services, which would help equipment manufacturers and service providers review the growth in demand.
2. The report helps system providers understand the pulse of the market and provides insights into drivers, restraints, opportunities, and challenges.
3. The report will help key players understand the strategies of their competitors better and help them in making better strategic decisions.

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