

Combined Heat and Power Market by Prime Mover (Gas Turbine, Steam Turbine, Reciprocating Engine, Fuel Cell, Microturbine), Capacity (Up to 10 MW, 10-150 MW, 151-300 MW, Above 300 MW), Fuel, End User and Region - Global Forecast to 2029

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Abstracts

The global combined heat and power market is projected to reach USD 39.2 billion by 2029 from an estimated USD 30.4 billion in 2024, at a CAGR of 5.2% during the forecast period. The increasing demand for combined heat and power is driven by their efficient utilization of heat, reduced carbon emissions, simultaneous electricity and heating demand and increasing reliance on electric heating.

“10-150 MW segment is expected to emerge as the largest segment based on capacity.”

Based on capacity, the combined heat and power market has been segmented into up to 10 MW, 10 MW to 150 MW, 151 MW to 300 MW and above 300 MW. This segment is increasing due to Ongoing advancements in CHP technology, such as improved engine efficiency, enhanced control systems, and integration with renewable energy sources, making systems within the 10-150 MW range more efficient, reliable, and attractive to end-users. Additionally, 10-150 MW range enables significant cost savings by reducing energy expenses through efficient onsite power generation and heat recovery. This can lead to lower operational costs and improved competitiveness for industrial and commercial facilities.

“Gas turbine is expected to be the second largest segment of the combined heat and power market, by prime mover.”

Based on prime mover, the combined heat and power market has been segmented into gas turbine, steam turbine, reciprocating engine, fuel cell, microturbine, others. The gas turbine segment is the second largest segment in the combined heat and power market as they offer favorable economics for CHP projects, with relatively low operating costs, high efficiency, and potential revenue streams from electricity sales and heat recovery. This economic viability makes gas turbine-based CHP systems financially attractive for end-users across various industries and sectors and they are known for their high efficiency in converting fuel into electricity and thermal energy. This efficiency makes them attractive for CHP applications, where maximizing energy output is crucial for cost savings and environmental sustainability.

“Europe” is expected to be the second largest region in the combined heat and power market.”

Europe is expected to be the second-largest region for combined heat and power (CHP) systems market between 2024–2029 due to its strong emphasis on energy efficiency, renewable energy integration, and climate goals. Robust regulatory frameworks, supportive policies, and significant investments in CHP infrastructure contribute to Europe's leading position in the global CHP market. Moreover, the region's mature industrial base, coupled with a focus on reducing greenhouse gas emissions, drives demand for efficient and sustainable energy solutions like CHP systems.

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- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Levels- 25%, and Others- 45%

By Region: North America- 20%, Europe- 30%, Asia Pacific- 50%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of

2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The combined heat and power market is dominated by some major players that have a wide regional presence. The leading players in the market are GE (US), Siemens Energy (Germany), Veolia (France), Wartsila (Finland), and 2G Energy (Germany).

Research Coverage:

The report defines, describes, and forecasts the global combined heat and power market, by capacity, fuel, prime mover, end user and region. 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. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value, and future trends in the combined heat and power market.

Key Benefits of Buying the Report

Analysis of major drivers (Government programs and incentives to promote CHP), restraints (Increased installation and maintenance costs of CHP systems), opportunities (Rise in deployment of micro-CHP systems), challenges (Damage to prime movers due to impurities in biogas fueled CHP plans) influencing the combined heat and power market.

Product Development/ Innovation: Players involved in the combined heat and power market are investing in research and development activities and are coming up with new products in order to maintain their competitive edge in the market. General Electric introduced the 7HA.03 gas turbine, boasting increased capacity and efficiency compared to its predecessor, the 7HA.02. With a net output of 430 MW and a net efficiency of 43.2%, it offers an additional 134 megawatts of power.

Market Development: The global combined heat and power market is experiencing robust development, due to Advancements such as higher efficiency gas turbines, improved heat recovery systems, and integration with renewable energy sources contribute to expanding the capabilities and appeal of CHP systems. Supportive policies and incentives from governments and regulatory bodies incentivize the adoption of CHP systems. Measures such as feed-in tariffs, tax credits, and renewable energy targets encourage investment in CHP projects and create a favorable market environment for manufacturers

and developers.

Market Diversification: 2G Energy AG, a prominent provider of gas-fueled CHP systems worldwide, has forged a framework agreement with Centrica Business Solutions UK Ltd. This agreement underscores their dedication to supplying combined heat and power (CHP) systems, marking a strategic partnership between the two entities.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like GE (US), Siemens Energy (Germany), Veolia (France), Wartsila (Finland), and 2G Energy (Germany) among others in the combined heat and power market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

1.3.2 REGIONAL SCOPE

1.3.3 INCLUSIONS AND EXCLUSIONS

TABLE 1 COMBINED HEAT AND POWER MARKET: INCLUSIONS AND EXCLUSIONS, BY END USER

TABLE 2 COMBINED HEAT AND POWER MARKET: INCLUSIONS AND EXCLUSIONS, BY CAPACITY

TABLE 3 COMBINED HEAT AND POWER MARKET: INCLUSIONS AND EXCLUSIONS, BY PRIME MOVER

TABLE 4 COMBINED HEAT AND POWER MARKET: INCLUSIONS AND EXCLUSIONS, BY FUEL

TABLE 5 COMBINED HEAT AND POWER MARKET: INCLUSIONS AND EXCLUSIONS, BY REGION

1.3.4 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

1.5 UNITS CONSIDERED

1.6 LIMITATIONS

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

1.9 RECESSION IMPACT

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 COMBINED HEAT AND POWER MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.1.2 List of major secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 List of key primary interview participants

2.1.2.2 Key data from primary sources

2.1.2.3 Key industry insights

2.1.2.4 Breakdown of primaries

FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 DATA TRIANGULATION

FIGURE 3 COMBINED HEAT AND POWER MARKET: DATA TRIANGULATION METHODOLOGY

2.3 MARKET SCOPE

FIGURE 4 MAIN METRICS CONSIDERED WHILE ANALYZING AND ASSESSING DEMAND IN COMBINED HEAT AND POWER MARKET

2.4 MARKET SIZE ESTIMATION

2.4.1 BOTTOM-UP APPROACH

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.4.2 TOP-DOWN APPROACH

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.4.3 DEMAND-SIDE ANALYSIS

2.4.3.1 Regional analysis (demand side)

2.4.3.2 Country-level analysis (demand side)

2.4.3.3 Demand-side calculations

2.4.3.4 Demand-side assumptions

2.4.4 SUPPLY-SIDE ANALYSIS

FIGURE 7 KEY STEPS CONSIDERED IN ASSESSING SUPPLY FOR COMBINED HEAT AND POWER MARKET

FIGURE 8 COMBINED HEAT AND POWER MARKET: SUPPLY-SIDE ANALYSIS

2.4.4.1 Supply-side calculations

2.4.4.2 Supply-side assumptions

2.4.5 GROWTH FORECAST ASSUMPTIONS

2.5 RISK ASSESSMENT

2.6 RESEARCH ASSUMPTIONS

2.7 RESEARCH LIMITATIONS

2.8 IMPACT OF RECESSION

2.8.1 PARAMETERS CONSIDERED TO ANALYZE RECESSION IMPACT ON COMBINED HEAT AND POWER MARKET

3 EXECUTIVE SUMMARY

TABLE 6 COMBINED HEAT AND POWER MARKET SNAPSHOT

FIGURE 9 11–150 MW SEGMENT TO ACCOUNT FOR LARGEST SHARE OF COMBINED HEAT AND POWER MARKET IN 2029

FIGURE 10 RECIPROCATING ENGINE SEGMENT TO HOLD LARGEST SHARE OF

COMBINED HEAT AND POWER MARKET IN 2029

FIGURE 11 NATURAL GAS SEGMENT TO LEAD COMBINED HEAT AND POWER MARKET IN 2029

FIGURE 12 INDUSTRIAL SEGMENT TO DOMINATE COMBINED HEAT AND POWER MARKET IN 2029

FIGURE 13 ASIA PACIFIC ACCOUNTED FOR LARGEST SHARE OF COMBINED HEAT AND POWER MARKET IN 2024

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN COMBINED HEAT AND POWER MARKET

FIGURE 14 INCREASING URBANIZATION, POPULATION, AND NEED TO REDUCE CARBON EMISSIONS TO PROPEL MARKET

4.2 COMBINED HEAT AND POWER MARKET IN ASIA PACIFIC, BY FUEL AND COUNTRY

FIGURE 15 NATURAL GAS SEGMENT AND CHINA DOMINATED COMBINED HEAT AND POWER MARKET IN ASIA PACIFIC IN 2023

4.3 COMBINED HEAT AND POWER MARKET, BY CAPACITY

FIGURE 16 11–150 MW SEGMENT TO HOLD LARGEST SHARE OF COMBINED HEAT AND POWER MARKET IN 2029

4.4 COMBINED HEAT AND POWER MARKET, BY PRIME MOVER

FIGURE 17 RECIPROCATING ENGINE SEGMENT TO DOMINATE MARKET SHARE IN 2029

4.5 COMBINED HEAT AND POWER MARKET, BY FUEL

FIGURE 18 NATURAL GAS SEGMENT TO LEAD COMBINED HEAT AND POWER MARKET SHARE IN 2029

4.6 COMBINED HEAT AND POWER MARKET, BY END USER

FIGURE 19 INDUSTRIAL SEGMENT TO HOLD LARGEST SHARE OF COMBINED HEAT AND POWER MARKET IN 2029

4.7 COMBINED HEAT AND POWER MARKET, BY REGION

FIGURE 20 ASIA PACIFIC TO REGISTER HIGHEST CAGR IN COMBINED HEAT AND POWER MARKET DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 21 COMBINED HEAT AND POWER MARKET: DRIVERS, RESTRAINTS,

OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Favorable government programs and incentives to promote adoption of CHP systems

5.2.1.2 Rise in use of natural gas for power generation

FIGURE 22 POWER GENERATION FROM NATURAL GAS, 2021–2022

FIGURE 23 GLOBAL NATURAL GAS CONSUMPTION

5.2.1.3 Improved cost-efficiency in wastewater treatment facilities

TABLE 7 WASTEWATER TREATMENT FACILITIES WITH COMBINED HEAT AND POWER SYSTEMS IN US

5.2.2 RESTRAINTS

5.2.2.1 High installation and maintenance costs of CHP systems

5.2.2.2 Existence of competing technologies

5.2.2.3 Rising concerns over stable natural gas supply for CHP systems

5.2.3 OPPORTUNITIES

5.2.3.1 Increasing deployment of micro-CHP systems

FIGURE 24 FUEL CELL MICRO-CHP INSTALLATIONS IN JAPAN, 2009–2017

5.2.3.2 Pressing need to replace and upgrade aged power generation equipment

5.2.3.3 Rising trend of distributed power generation

5.2.4 CHALLENGES

5.2.4.1 High contamination from biogas fuel causing damage to prime movers

TABLE 8 CHP PRIME MOVER TOLERANCE TO BIOGAS CONTAMINANTS

5.2.4.2 Challenges posed by utilities for sale of excess electricity by CHP plants

5.2.4.3 Stability issues arising from decentralization of energy generation

5.3 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 25 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

5.4 PRICING ANALYSIS

5.4.1 AVERAGE INSTALLATION COST OF SMALL-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER

TABLE 9 AVERAGE INSTALLATION COST OF SMALL-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029 (USD/KW)

FIGURE 26 AVERAGE INSTALLATION COST OF SMALL-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029

TABLE 10 AVERAGE INSTALLATION COST OF MEDIUM-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029 (USD/KW)

FIGURE 27 AVERAGE INSTALLATION COST OF MEDIUM-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029

5.4.2 AVERAGE INSTALLATION COST OF LARGE-CAPACITY COMBINED HEAT

AND POWER SYSTEMS, BY PRIME MOVER

TABLE 11 AVERAGE INSTALLATION COST OF LARGE-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029 (USD/KW)

FIGURE 28 AVERAGE INSTALLATION COST OF LARGE-CAPACITY COMBINED HEAT AND POWER SYSTEMS, BY PRIME MOVER, 2021, 2022, 2023, AND 2029

5.4.3 AVERAGE INSTALLATION COST OF COMBINED HEAT AND POWER SYSTEMS, BY REGION

TABLE 12 AVERAGE INSTALLATION COST OF COMBINED HEAT AND POWER SYSTEMS, BY REGION, 2021, 2022, 2023, AND 2029 (USD/KW)

FIGURE 29 AVERAGE INSTALLATION COST OF COMBINED HEAT AND POWER SYSTEMS, BY REGION, 2021, 2022, 2023, AND 2029

5.5 VALUE CHAIN ANALYSIS

FIGURE 30 COMBINED HEAT AND POWER MARKET: VALUE CHAIN ANALYSIS

5.5.1 RAW MATERIAL PROVIDERS/COMPONENT MANUFACTURERS/SUPPLIERS

5.5.2 COMBINED HEAT AND POWER SYSTEM MANUFACTURERS/ASSEMBLERS

5.5.3 DISTRIBUTORS/RESELLERS

5.5.4 END USERS

5.5.5 MAINTENANCE/SERVICE PROVIDERS

5.6 ECOSYSTEM ANALYSIS

TABLE 13 ROLE OF COMPANIES IN COMBINED HEAT AND POWER ECOSYSTEM

FIGURE 31 COMBINED HEAT AND POWER MARKET: ECOSYSTEM MAPPING

5.7 TECHNOLOGY ANALYSIS

5.7.1 HYBRID STORAGE SYSTEM WITH LITHIUM-ION AND REDOX FLOW BATTERY

5.7.2 ADVANCED CONTROL AND MONITORING SYSTEMS

5.8 REGULATORY LANDSCAPE

TABLE 14 COMBINED HEAT AND POWER MARKET: REGULATIONS

5.9 PATENT ANALYSIS

FIGURE 32 TOP 10 PLAYERS WITH HIGHEST NUMBER OF PATENTS PERTAINING TO COMBINED HEAT AND POWER, 2016–2023

FIGURE 33 TOTAL NUMBER OF PATENTS GRANTED PERTAINING TO COMBINED HEAT AND POWER, 2013–2023

TABLE 15 TOP 15 PATENT OWNERS PERTAINING TO COMBINED HEAT AND POWER, 2013–2023

TABLE 16 LIST OF MAJOR PATENTS PERTAINING TO COMBINED HEAT AND POWER, 2016–2023

5.10 TRADE ANALYSIS

5.10.1 HS CODE 8406

5.10.1.1 Export scenario for HS code 8406-compliant products

TABLE 17 EXPORT DATA FOR HS CODE 8406-COMPLIANT PRODUCTS, BY COUNTRY, 2020–2022 (USD THOUSAND)

FIGURE 34 EXPORT DATA FOR HS CODE 8406-COMPLIANT PRODUCTS TOP FIVE COUNTRIES, 2020–2022 (USD THOUSAND)

5.10.1.2 Import scenario for HS code 8406-compliant products

TABLE 18 IMPORT SCENARIO FOR HS CODE 8406-COMPLIANT PRODUCTS, BY COUNTRY, 2020–2022 (USD THOUSAND)

FIGURE 35 IMPORT DATA FOR HS CODE 8406-COMPLIANT PRODUCTS FOR TOP FIVE COUNTRIES, 2020–2022 (USD THOUSAND)

5.10.2 HS CODE 841182

5.10.2.1 Export scenario for HS code 841182-compliant products

TABLE 19 EXPORT DATA FOR HS CODE 841182-COMPLIANT PRODUCTS, BY COUNTRY, 2020–2022 (USD THOUSAND)

FIGURE 36 EXPORT DATA FOR HS CODE 841182-COMPLIANT PRODUCTS FOR TOP FIVE COUNTRIES, 2020–2022 (USD THOUSAND)

5.10.2.2 Import scenario for HS code 841182-compliant products

TABLE 20 IMPORT DATA FOR HS CODE 841182, BY COUNTRY, 2020–2022 (USD THOUSAND)

FIGURE 37 IMPORT DATA FOR HS CODE 841182-COMPLIANT PRODUCTS FOR TOP FIVE COUNTRIES, 2020–2022 (USD THOUSAND)

5.11 KEY CONFERENCES AND EVENTS, 2024

TABLE 21 COMBINED HEAT AND POWER MARKET: LIST OF KEY CONFERENCES AND EVENTS, 2024

5.12 TARIFF ANALYSIS

5.12.1 TARIFFS RELATED TO COMBINED HEAT AND POWER MARKET

TABLE 22 IMPORT TARIFF FOR HS CODE 841182-COMPLIANT PRODUCTS, 2022

TABLE 23 IMPORT TARIFF FOR HS CODE 8406-COMPLIANT PRODUCTS, 2022

5.13 PORTER'S FIVE FORCES ANALYSIS

FIGURE 38 COMBINED HEAT AND POWER MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 24 IMPACT OF EACH FORCE ON COMBINED HEAT AND POWER MARKET

5.13.1 THREAT OF SUBSTITUTES

5.13.2 BARGAINING POWER OF SUPPLIERS

5.13.3 BARGAINING POWER OF BUYERS

5.13.4 THREAT OF NEW ENTRANTS

5.13.5 INTENSITY OF COMPETITIVE RIVALRY

5.14 CASE STUDY ANALYSIS

5.14.1 TATA CHEMICALS DEPLOYED NEW CHP SYSTEM TO REDUCE CARBON

EMISSIONS AND INCREASE SODIUM BICARBONATE PRODUCTION

5.14.2 NHS INSTALLED VEOLIA'S CHP-BASED SYSTEM TO ACHIEVE CARBON REDUCTION TARGETS

5.14.3 PLACES LEISURE INSTALLED CENTRICA BUSINESS SOLUTIONS' CHP UNITS TO REDUCE ENERGY COSTS

5.14.4 SOUTHEND HOSPITAL USED CLARKE ENERGY'S CHP SYSTEMS TO REDUCE ELECTRICITY COSTS

6 COMBINED HEAT AND POWER MARKET, BY CAPACITY

6.1 INTRODUCTION

FIGURE 39 COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2023

TABLE 25 COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 26 COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

6.2 UP TO 10 MW

6.2.1 GROWING NEED FOR ENERGY EFFICIENCY IN RESIDENTIAL AND COMMERCIAL APPLICATIONS TO DRIVE MARKET

TABLE 27 UP TO 10 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 28 UP TO 10 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

6.3 11–150 MW

6.3.1 HIGH DEMAND FROM ENERGY-INTENSIVE INDUSTRIES TO FUEL MARKET GROWTH

TABLE 29 11–150 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 30 11–150 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

6.4 151–300 MW

6.4.1 INCREASING ADOPTION IN COGENERATION AND COMBINED CYCLE POWER PLANTS TO SUPPORT MARKET GROWTH

TABLE 31 151–300 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 32 151–300 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

6.5 ABOVE 300 MW

6.5.1 RISING FOCUS OF UTILITIES ON COST-EFFICIENT AND CLEAN FUELS

FOR POWER GENERATION TO CREATE DEMAND

TABLE 33 ABOVE 300 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 34 ABOVE 300 MW: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

7 COMBINED HEAT AND POWER MARKET, BY PRIME MOVER

7.1 INTRODUCTION

FIGURE 40 COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2023

TABLE 35 COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 36 COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

7.2 GAS TURBINE

7.2.1 EFFICIENT USE OF HIGH-TEMPERATURE HEAT GENERATED FROM TURBINES TO DRIVE MARKET

TABLE 37 GAS TURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 38 GAS TURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

7.3 STEAM TURBINE

7.3.1 HIGH FLEXIBILITY OF STEAM TURBINES TO INCREASE DEMAND

TABLE 39 STEAM TURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 40 STEAM TURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

7.4 RECIPROCATING ENGINE

7.4.1 GROWING TREND OF DISTRIBUTED POWER GENERATION WORLDWIDE TO SUPPORT MARKET GROWTH

TABLE 41 RECIPROCATING ENGINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 42 RECIPROCATING ENGINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

7.5 FUEL CELL

7.5.1 RISING DEMAND FOR CLEAN POWER GENERATION TO DRIVE MARKET

TABLE 43 FUEL CELL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 44 FUEL CELL: COMBINED HEAT AND POWER MARKET, BY REGION,

2024–2029 (USD MILLION)

7.6 MICROTURBINE

7.6.1 HIGH HEAT AND POWER COGENERATION AND LOW CARBON EMISSIONS OFFERED BY MICROTURBINES TO PROPEL MARKET

TABLE 45 MICROTURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 46 MICROTURBINE: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

7.7 OTHER PRIME MOVERS

TABLE 47 OTHER PRIME MOVERS: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 48 OTHER PRIME MOVERS: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8 COMBINED HEAT AND POWER MARKET, BY FUEL

8.1 INTRODUCTION

FIGURE 41 COMBINED HEAT AND POWER MARKET, BY FUEL, 2023

TABLE 49 COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 50 COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

8.2 COAL

8.2.1 SIGNIFICANT USE AS PRIMARY FUEL SOURCE FOR CONVENTIONAL ELECTRICITY GENERATION TO SUPPORT MARKET GROWTH

TABLE 51 COAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 52 COAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8.3 NATURAL GAS

8.3.1 INCREASING NEED FOR CLEAN-BURNING FUELS TO BOOST MARKET GROWTH

TABLE 53 NATURAL GAS: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 54 NATURAL GAS: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8.4 BIOGAS/BIOMASS

8.4.1 RISING AWARENESS OF SUSTAINABILITY TO DRIVE MARKET

TABLE 55 BIOGAS/BIOMASS: COMBINED HEAT AND POWER MARKET, BY

REGION, 2019–2023 (USD MILLION)

TABLE 56 BIOGAS/BIOMASS: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8.5 NUCLEAR

8.5.1 ENVIRONMENTAL BENEFITS OFFERED BY NUCLEAR SYSTEMS TO FOSTER MARKET GROWTH

TABLE 57 NUCLEAR: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 58 NUCLEAR: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8.6 DIESEL

8.6.1 IMMEDIATE NEED FOR ENERGY SECURITY TO FUEL MARKET GROWTH

TABLE 59 DIESEL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 60 DIESEL: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

8.7 OTHER FUELS

TABLE 61 OTHER FUELS: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 62 OTHER FUELS: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

9 COMBINED HEAT AND POWER MARKET, BY END USER

9.1 INTRODUCTION

FIGURE 42 COMBINED HEAT AND POWER MARKET, BY END USER, 2023

TABLE 63 COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 64 COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

9.2 RESIDENTIAL

9.2.1 GROWING NEED TO MITIGATE CARBON EMISSIONS AND REDUCE DEPENDENCE ON CENTRALIZED POWER GENERATION TO CONTRIBUTE TO MARKET GROWTH

TABLE 65 RESIDENTIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 66 RESIDENTIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

9.3 COMMERCIAL

9.3.1 RISING NEED FOR ENVIRONMENT-FRIENDLY SYSTEMS FOR LARGE-SCALE COMMERCIAL APPLICATIONS TO FUEL MARKET GROWTH

TABLE 67 COMMERCIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 68 COMMERCIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

9.4 INDUSTRIAL

9.4.1 GROWING DEMAND FOR RELIABLE POWER SUPPLY TO DRIVE MARKET

TABLE 69 INDUSTRIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 70 INDUSTRIAL: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

9.5 UTILITIES

9.5.1 RISING FOCUS OF UTILITIES ON COST-EFFICIENT AND CLEAN FUELS TO CREATE DEMAND

TABLE 71 UTILITIES: COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 72 UTILITIES: COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

10 COMBINED HEAT AND POWER MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 43 COMBINED HEAT AND POWER MARKET IN ASIA PACIFIC TO REGISTER HIGHEST CAGR FROM 2024 TO 2029

FIGURE 44 COMBINED HEAT AND POWER MARKET, BY REGION, 2023

TABLE 73 COMBINED HEAT AND POWER MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 74 COMBINED HEAT AND POWER MARKET, BY REGION, 2024–2029 (USD MILLION)

TABLE 75 COMBINED HEAT AND POWER CAPACITY, BY REGION, 2019–2023 (MW)

TABLE 76 COMBINED HEAT AND POWER CAPACITY, BY REGION, 2024–2029 (MW)

10.2 ASIA PACIFIC

FIGURE 45 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET SNAPSHOT

10.2.1 IMPACT OF RECESSION ON COMBINED HEAT AND POWER MARKET IN ASIA PACIFIC

TABLE 77 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY CAPACITY,

2019–2023 (USD MILLION)

TABLE 78 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 79 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 80 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 81 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 82 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 83 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 84 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 85 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 86 ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.2.2 CHINA

10.2.2.1 Rapid industrialization and infrastructure development to fuel market growth

TABLE 87 CHINA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 88 CHINA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 89 CHINA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 90 CHINA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 91 CHINA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 92 CHINA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 93 CHINA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 94 CHINA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.3 JAPAN

10.2.3.1 Transition from nuclear energy to gas-based energy generation to drive

market

TABLE 95 JAPAN: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 96 JAPAN: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 97 JAPAN: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 98 JAPAN: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 99 JAPAN: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 100 JAPAN: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 101 JAPAN: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 102 JAPAN: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.4 SOUTH KOREA

10.2.4.1 Aim to reduce greenhouse gas emissions to drive market

TABLE 103 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 104 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 105 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 106 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 107 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 108 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 109 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 110 SOUTH KOREA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.5 AUSTRALIA

10.2.5.1 Favorable government incentives for installing clean and energy-efficient technologies to drive market

TABLE 111 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY,

2019–2023 (USD MILLION)

TABLE 112 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 113 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 114 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 115 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 116 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 117 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 118 AUSTRALIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.6 INDIA

10.2.6.1 Strong focus of industry players on enhancing energy efficiency to accelerate market growth

TABLE 119 INDIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 120 INDIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 121 INDIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 122 INDIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 123 INDIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 124 INDIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 125 INDIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 126 INDIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.2.7 REST OF ASIA PACIFIC

TABLE 127 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 128 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 129 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 130 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 131 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 132 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 133 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 134 REST OF ASIA PACIFIC: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3 EUROPE

10.3.1 IMPACT OF RECESSION ON COMBINED HEAT AND POWER MARKET IN EUROPE

FIGURE 46 EUROPE: COMBINED HEAT AND POWER MARKET SNAPSHOT

TABLE 135 EUROPE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 136 EUROPE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 137 EUROPE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 138 EUROPE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 139 EUROPE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 140 EUROPE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 141 EUROPE: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 142 EUROPE: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 143 EUROPE: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 144 EUROPE: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.3.2 GERMANY

10.3.2.1 Rising need to achieve CO2 emissions reduction targets to propel market
TABLE 145 GERMANY: COMBINED HEAT AND POWER MARKET, BY CAPACITY,

2019–2023 (USD MILLION)

TABLE 146 GERMANY: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 147 GERMANY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 148 GERMANY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 149 GERMANY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 150 GERMANY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 151 GERMANY: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 152 GERMANY: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3.3 UK

10.3.3.1 Growing need for efficient power generation to drive market

TABLE 153 UK: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 154 UK: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 155 UK: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 156 UK: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 157 UK: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 158 UK: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 159 UK: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 160 UK: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3.4 RUSSIA

10.3.4.1 Increasing trend of decentralized power generation to support market growth

TABLE 161 RUSSIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 162 RUSSIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 163 RUSSIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 164 RUSSIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 165 RUSSIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 166 RUSSIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 167 RUSSIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 168 RUSSIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3.5 FRANCE

10.3.5.1 Large installed base of nuclear power generation for commercial and residential applications to propel market

TABLE 169 FRANCE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 170 FRANCE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 171 FRANCE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 172 FRANCE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 173 FRANCE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 174 FRANCE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 175 FRANCE: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 176 FRANCE: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3.6 ITALY

10.3.6.1 Rising need to reduce carbon emissions to drive demand

TABLE 177 ITALY: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 178 ITALY: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 179 ITALY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 180 ITALY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 181 ITALY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 182 ITALY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 183 ITALY: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 184 ITALY: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.3.7 REST OF EUROPE

TABLE 185 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 186 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 187 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 188 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 189 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 190 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 191 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 192 REST OF EUROPE: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.4 NORTH AMERICA

10.4.1 IMPACT OF RECESSION ON COMBINED HEAT AND POWER MARKET IN NORTH AMERICA

TABLE 193 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 194 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 195 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 196 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 197 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL,

2019–2023 (USD MILLION)

TABLE 198 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 199 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 200 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 201 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 202 NORTH AMERICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.4.2 US

10.4.2.1 Favorable government programs for promoting CHP to drive market

TABLE 203 US: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 204 US: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 205 US: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 206 US: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 207 US: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 208 US: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 209 US: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 210 US: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.4.3 CANADA

10.4.3.1 Need to meet power generation requirements to propel market

TABLE 211 CANADA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 212 CANADA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 213 CANADA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 214 CANADA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 215 CANADA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 216 CANADA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 217 CANADA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 218 CANADA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.4.4 MEXICO

10.4.4.1 Increasing government initiatives for clean electricity production to boost market growth

TABLE 219 MEXICO: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 220 MEXICO: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 221 MEXICO: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 222 MEXICO: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 223 MEXICO: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 224 MEXICO: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 225 MEXICO: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 226 MEXICO: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5 MIDDLE EAST & AFRICA

10.5.1 IMPACT OF RECESSION ON COMBINED HEAT AND POWER MARKET IN MIDDLE EAST & AFRICA

TABLE 227 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 228 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 229 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 230 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 231 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY

FUEL, 2019–2023 (USD MILLION)

TABLE 232 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 233 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 234 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 235 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 236 MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.5.2 GCC COUNTRIES

TABLE 237 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 238 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 239 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 240 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 241 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 242 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 243 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 244 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 245 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 246 GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.5.2.1 Saudi Arabia

10.5.2.1.1 Emerging trend of clean power generation to drive market

TABLE 247 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 248 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 249 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY PRIME

MOVER, 2019–2023 (USD MILLION)

TABLE 250 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 251 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 252 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 253 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 254 SAUDI ARABIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.2.2 UAE

10.5.2.2.1 Increasing share of renewables in electricity generation mix to propel market

TABLE 255 UAE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 256 UAE: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 257 UAE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 258 UAE: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 259 UAE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 260 UAE: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 261 UAE: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 262 UAE: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.2.3 Rest of GCC countries

TABLE 263 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 264 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 265 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 266 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 267 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 268 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 269 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 270 REST OF GCC COUNTRIES: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.3 TURKEY

10.5.3.1 Requirement of sustainable economic growth and energy security to propel market

TABLE 271 TURKEY: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 272 TURKEY: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 273 TURKEY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 274 TURKEY: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 275 TURKEY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 276 TURKEY: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 277 TURKEY: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 278 TURKEY: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.4 NIGERIA

10.5.4.1 Need for increased power generation to boost market growth

TABLE 279 NIGERIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 280 NIGERIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 281 NIGERIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 282 NIGERIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 283 NIGERIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 284 NIGERIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 285 NIGERIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 286 NIGERIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.5 SOUTH AFRICA

10.5.5.1 Stringent government policies to limit carbon emissions to contribute to market growth

TABLE 287 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 288 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 289 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 290 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 291 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 292 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 293 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 294 SOUTH AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.6 ALGERIA

10.5.6.1 Rising need to reduce CO2 emissions and add renewables to energy mix to drive market

TABLE 295 ALGERIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 296 ALGERIA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 297 ALGERIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 298 ALGERIA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 299 ALGERIA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 300 ALGERIA: COMBINED HEAT AND POWER MARKET, BY FUEL,

2024–2029 (USD MILLION)

TABLE 301 ALGERIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 302 ALGERIA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.5.7 REST OF MIDDLE EAST & AFRICA

TABLE 303 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 304 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 305 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 306 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 307 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 308 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 309 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 310 REST OF MIDDLE EAST & AFRICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.6 SOUTH AMERICA

10.6.1 IMPACT OF RECESSION ON COMBINED HEAT AND POWER MARKET IN SOUTH AMERICA

TABLE 311 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 312 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 313 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 314 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 315 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 316 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 317 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 318 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

TABLE 319 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 320 SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

10.6.2 BRAZIL

10.6.2.1 Growing power demand from industrial sector to drive market

TABLE 321 BRAZIL: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 322 BRAZIL: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 323 BRAZIL: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 324 BRAZIL: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 325 BRAZIL: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 326 BRAZIL: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 327 BRAZIL: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 328 BRAZIL: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.6.3 ARGENTINA

10.6.3.1 Increased power demand and unreliable power supply to fuel market growth

TABLE 329 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 330 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 331 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 332 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 333 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 334 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 335 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY END USER,

2019–2023 (USD MILLION)

TABLE 336 ARGENTINA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

10.6.4 REST OF SOUTH AMERICA

TABLE 337 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2019–2023 (USD MILLION)

TABLE 338 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY CAPACITY, 2024–2029 (USD MILLION)

TABLE 339 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2019–2023 (USD MILLION)

TABLE 340 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY PRIME MOVER, 2024–2029 (USD MILLION)

TABLE 341 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2019–2023 (USD MILLION)

TABLE 342 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY FUEL, 2024–2029 (USD MILLION)

TABLE 343 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2019–2023 (USD MILLION)

TABLE 344 REST OF SOUTH AMERICA: COMBINED HEAT AND POWER MARKET, BY END USER, 2024–2029 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

TABLE 345 OVERVIEW OF KEY STRATEGIES ADOPTED BY TOP PLAYERS, JANUARY 2019– MARCH 2023

11.2 MARKET SHARE ANALYSIS, 2023

TABLE 346 COMBINED HEAT AND POWER MARKET: DEGREE OF COMPETITION

FIGURE 47 MARKET SHARE ANALYSIS OF TOP FIVE PLAYERS, 2023

11.3 REVENUE ANALYSIS, 2019–2023

FIGURE 48 REVENUE ANALYSIS OF TOP FIVE PLAYERS, 2019–2023

11.4 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

11.4.1 STARS

11.4.2 PERVASIVE PLAYERS

11.4.3 EMERGING LEADERS

11.4.4 PARTICIPANTS

FIGURE 49 COMBINED HEAT AND POWER MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS), 2023

11.4.5 COMPANY FOOTPRINT

11.4.5.1 Company overall footprint

TABLE 347 COMBINED HEAT AND POWER MARKET: COMPANY OVERALL FOOTPRINT

11.4.5.2 Company capacity footprint

TABLE 348 COMBINED HEAT AND POWER MARKET: BY CAPACITY FOOTPRINT

11.4.5.3 Company fuel footprint

TABLE 349 COMBINED HEAT AND POWER MARKET: BY FUEL FOOTPRINT

11.4.5.4 Company prime mover footprint

TABLE 350 COMBINED HEAT AND POWER MARKET: BY PRIME MOVER FOOTPRINT

11.4.5.5 Company end user footprint

TABLE 351 COMBINED HEAT AND POWER MARKET: BY END USER FOOTPRINT

11.4.5.6 Company region footprint

TABLE 352 COMBINED HEAT AND POWER MARKET: BY REGION FOOTPRINT

11.5 COMPETITIVE SCENARIO AND TRENDS

11.5.1 PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 353 COMBINED HEAT AND POWER MARKET: PRODUCT LAUNCHES/DEVELOPMENTS, APRIL 2017–JULY 2023

11.5.2 DEALS

TABLE 354 COMBINED HEAT AND POWER MARKET: DEALS, APRIL 2018–FEBRUARY 2024

11.5.3 OTHERS

TABLE 355 COMBINED HEAT AND POWER MARKET: OTHERS, NOVEMBER 2019–SEPTEMBER 2023

12 COMPANY PROFILES

12.1 KEY PLAYERS

(Business Overview, Products/Solutions/Services offered, Recent Developments, MnM View)*

12.1.1 GENERAL ELECTRIC

TABLE 356 GENERAL ELECTRIC: COMPANY OVERVIEW

FIGURE 50 GENERAL ELECTRIC: COMPANY SNAPSHOT

TABLE 357 GENERAL ELECTRIC: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 358 GENERAL ELECTRIC: PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 359 GENERAL ELECTRIC: DEALS

TABLE 360 GENERAL ELECTRIC: OTHERS

12.1.2 SIEMENS ENERGY

TABLE 361 SIEMENS ENERGY: COMPANY OVERVIEW

FIGURE 51 SIEMENS ENERGY: COMPANY SNAPSHOT

TABLE 362 SIEMENS ENERGY: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 363 SIEMENS ENERGY: DEALS

TABLE 364 SIEMENS ENERGY: OTHERS

12.1.3 W?RTSIL?

TABLE 365 W?RTSIL?: COMPANY OVERVIEW

FIGURE 52 W?RTSIL?: COMPANY SNAPSHOT

TABLE 366 W?RTSIL?: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 367 W?RTSIL?: DEALS

TABLE 368 W?RTSIL?: OTHERS

12.1.4 2G ENERGY INC.

TABLE 369 2G ENERGY INC.: COMPANY OVERVIEW

FIGURE 53 2G ENERGY INC.: COMPANY SNAPSHOT

TABLE 370 2G ENERGY INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 371 2G ENERGY INC.: PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 372 2G ENERGY INC.: DEALS

TABLE 373 2G ENERGY INC.: OTHERS

12.1.5 MITSUBISHI HEAVY INDUSTRIES, LTD.

TABLE 374 MITSUBISHI HEAVY INDUSTRIES, LTD: COMPANY OVERVIEW

FIGURE 54 MITSUBISHI HEAVY INDUSTRIES, LTD.: COMPANY SNAPSHOT

TABLE 375 MITSUBISHI HEAVY INDUSTRIES, LTD.:

PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 376 MITSUBISHI HEAVY INDUSTRIES, LTD.: DEALS

TABLE 377 MITSUBISHI HEAVY INDUSTRIES: OTHERS

12.1.6 CLARKE ENERGY

TABLE 378 CLARKE E ENERGY: COMPANY OVERVIEW

TABLE 379 CLARKE ENERGY: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 380 CLARKE ENERGY: PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 381 CLARKE ENERGY: OTHERS

12.1.7 CATERPILLAR

TABLE 382 CATERPILLAR: COMPANY OVERVIEW

FIGURE 55 CATERPILLAR: COMPANY SNAPSHOT

TABLE 383 CATERPILLAR: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 384 CATERPILLAR: PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 385 CATERPILLAR: OTHERS

12.1.8 E. ON SE

TABLE 386 E.ON SE: COMPANY OVERVIEW

FIGURE 56 E.ON SE: COMPANY SNAPSHOT

TABLE 387 E.ON: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 388 E.ON: PRODUCT LAUNCHES/DEVELOPMENTS

TABLE 389 E.ON: DEALS

TABLE 390 E.ON: OTHERS

12.1.9 VEOLIA

TABLE 391 VEOLIA: COMPANY OVERVIEW

FIGURE 57 VEOLIA: COMPANY SNAPSHOT

TABLE 392 VEOLIA: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 393 VEOLIA: DEALS

TABLE 394 VEOLIA: OTHERS

12.1.10 ROBERT BOSCH GMBH

TABLE 395 ROBERT BOSCH GMBH: COMPANY OVERVIEW

FIGURE 58 ROBERT BOSCH GMBH: COMPANY SNAPSHOT

TABLE 396 ROBERT BOSCH GMBH: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 397 ROBERT BOSCH GMBH: DEALS

TABLE 398 ROBERT BOSCH GMBH: OTHERS

12.1.11 MAN ENERGY SOLUTIONS

TABLE 399 MAN ENERGY SOLUTIONS: COMPANY OVERVIEW

FIGURE 59 MAN ENERGY SOLUTIONS: COMPANY SNAPSHOT

TABLE 400 MAN ENERGY SOLUTIONS: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 401 MAN ENERGY SOLUTIONS: OTHERS

12.1.12 AB HOLDING SPA

TABLE 402 AB HOLDING SPA: COMPANY OVERVIEW

TABLE 403 AB HOLDING SPA: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 404 AB HOLDING SPA: OTHERS

12.1.13 FUELCELL ENERGY, INC.

TABLE 405 FUELCELL ENERGY, INC.: COMPANY OVERVIEW

FIGURE 60 FUELCELL ENERGY, INC.: COMPANY SNAPSHOT

TABLE 406 FUELCELL ENERGY, INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 407 FUELCELL ENERGY, INC.: PRODUCT LAUNCHES/DEVELOPMENTS

12.1.14 CAPSTONE GREEN ENERGY CORPORATION

TABLE 408 CAPSTONE GREEN ENERGY CORPORATION: COMPANY OVERVIEW

FIGURE 61 CAPSTONE GREEN ENERGY CORPORATION: COMPANY SNAPSHOT

TABLE 409 CAPSTONE GREEN ENERGY CORPORATION: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 410 CAPSTONE GREEN ENERGY CORPORATION: DEALS

TABLE 411 CAPSTONE GREEN ENERGY CORPORATION: OTHERS

12.1.15 CUMMINS INC.

TABLE 412 CUMMINS INC.: COMPANY OVERVIEW

FIGURE 62 CUMMINS INC.: COMPANY SNAPSHOT

TABLE 413 CUMMINS INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 414 CUMMINS INC.: OTHERS

*Details on Business Overview, Products/Solutions/Services offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

12.2 OTHER PLAYERS

12.2.1 CENTRICA PLC

12.2.2 TECOGEN, INC.

12.2.3 BDR THERMEA GROUP

12.2.4 VIESSMANN GROUP

12.2.5 DALKIA AEGIS, EDF GROUP

12.2.6 CLEARCELL POWER

12.2.7 H3 COMBINED HEAT AND POWER

12.2.8 ENEXOR ENERGY LLC

12.2.9 RESET

12.2.10 HELEC

13 APPENDIX

13.1 INSIGHTS FROM INDUSTRY EXPERTS

13.2 DISCUSSION GUIDE

13.3 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

13.4 CUSTOMIZATION OPTIONS

13.5 RELATED REPORTS

13.6 AUTHOR DETAILS

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