

Small Hydropower Market by Capacity (Up to 1 MW, 1–10 MW), Type (Micro Hydropower, Mini Hydropower), Components (Electromechanical Equipment, Electric infrastructure, Civil Works), and Region - Global Forecast to 2024

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Abstracts

“The small hydropower market is projected to reach USD 3.0 billion by 2024, at a CAGR of 2.4% from 2019 to 2024.”

The global small hydropower market is projected to reach USD 3.0 billion by 2024 from an estimated market size of USD 2.6 billion in 2019, at a CAGR of 2.4% during the forecast period. The growing investments in small hydropower projects to increase rural electrification in developing countries is expected to drive the demand for small hydropower. Moreover, the financial incentives and assistance in the form of low-interest loans, grants, renewable purchase obligations, and feeding tariffs, would further aid the growth of this market. The unstable supply as the energy generated depends on seasonal highs and lows is a restraint for the growth of the small hydropower market.

“The 1–10 MW segment is expected to dominate the small hydropower market in 2019.”

The 1–10 MW segment is expected to dominate the small hydropower market in 2019 owing to the small hydropower installations in various countries across the globe. This higher share of 1–10 MW plants can be attributed to the small-scale decentralized projects being deployed in developing nations, especially in Asia Pacific, for rural electrification. Asia Pacific dominated the 1–10 MW segment of the small hydropower market. China, Vietnam, and India are the account for the significant share of the small hydropower installations in this region. The demand for small hydropower is driven by

increasing investments for rural electrification in these countries.

“The small hydropower, civil works segment is expected to hold the largest share during the forecast period. “

The civil works segment is estimated to hold the largest share of the small hydropower market, by component, from 2019 to 2024. Civil works account for the significant share of project costs in all small hydropower projects. Small hydropower plants generally do not require the construction of dams, reservoirs, or any kind of storage structure as most plants are runoff run-of-river plants. But, to properly guide the water on to turbines and to increase the water head, civil structures such as weirs are constructed. These simple civil structures are cheaper than those in large hydropower plants, but they constitute a large share of the total project cost in small hydropower plants.

“Asia Pacific is expected to lead the global small hydropower market in terms of market size”

Asia Pacific is currently the largest small hydropower market, followed by Europe and North America. China, Vietnam, and India are the world's fastest-growing economies, contributing largely to the Asia Pacific market. The Asia Pacific market is expected to grow during the forecast period owing to the investments in rural electrification and off-grid energy generation.

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 I: 60%, Tier II: 27%, and Tier III: 13%

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

By Region: Asia Pacific: 40%, North America: 20%, Europe: 18%, South America: 16%, and the Rest of the World: 6%

Note: Others include sales managers, marketing managers, product managers, and product engineers.

The tier of the companies is defined on the basis of their total revenue, as of 2017; Tier 1: USD 1 billion, Tier 2: USD 500 million–1 billion, and Tier 3:

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