

# **Aftermarket Natural Gas Generator Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Service & Maintenance, Repair, Overhaul & Remanufacturing, Upgrades & Modifications), By Application (Commercial, Industrial, Residential), By Region, By Competition, 2018-2028**

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## **Abstracts**

Global Aftermarket Natural Gas Generator Market was valued at USD 10.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.19% through 2028.

The global aftermarket natural gas generator market refers to the segment of the energy industry dedicated to providing products and services that support the maintenance, repair, upgrading, and enhancement of natural gas-powered generators after their initial installation. Natural gas generators are crucial assets used across various industries and applications for reliable electricity generation, often serving as backup power sources during outages or as primary power providers in distributed energy systems.

The aftermarket sector within this market encompasses a wide range of activities and offerings, including but not limited to replacement parts, maintenance services, technological retrofits, emissions control solutions, and performance enhancements. It caters to the needs of generator owners and operators seeking to ensure the continued operational efficiency, compliance with evolving emissions standards, and optimal performance of their natural gas generator assets.

Factors driving the demand for aftermarket services and products in this market include

the need for compliance with environmental regulations, the aging of generator fleets, the pursuit of energy efficiency, and the desire for enhanced energy security and resilience. The global aftermarket natural gas generator market plays a crucial role in sustaining the longevity, reliability, and adaptability of natural gas generators in a rapidly evolving energy landscape.

## Key Market Drivers

### Increasing Demand for Reliable Backup Power Solutions

The global aftermarket natural gas generator market is being driven by a growing demand for reliable backup power solutions across various industries and applications. With the increasing frequency of power outages due to extreme weather events, grid failures, and other unforeseen circumstances, businesses and institutions are recognizing the need for backup power sources to ensure uninterrupted operations. Natural gas generators, known for their efficiency and reliability, have become a preferred choice, and this trend is propelling the aftermarket market.

Natural gas generators offer several advantages, including cleaner emissions, lower operational costs, and faster startup times compared to diesel generators. As businesses prioritize sustainability and environmental responsibility, the appeal of natural gas generators continues to rise, further driving their adoption in the aftermarket.

### Growing Emphasis on Energy Efficiency and Environmental Sustainability

Another significant global aftermarket natural gas generator market driver is the increasing emphasis on energy efficiency and environmental sustainability. Governments and regulatory bodies worldwide are imposing stringent emissions standards and promoting cleaner energy sources to combat climate change and reduce air pollution. Natural gas generators align with these objectives, as they produce lower emissions compared to their diesel counterparts.

Furthermore, businesses are recognizing the long-term benefits of reducing their carbon footprint and energy consumption. This heightened environmental awareness has led to a surge in the retrofitting and upgrading of existing natural gas generators to meet the latest emission standards, creating a substantial aftermarket demand for emission control technologies and services.

### Aging Generator Fleet Requiring Maintenance and Upgrades

Many natural gas generator installations globally are aging, leading to increased maintenance and upgrade requirements. To maximize the lifespan and efficiency of these generators, businesses are investing in aftermarket services and components. Routine maintenance, repairs, and performance enhancements have become essential to ensure the continued reliability of these assets.

The aftermarket natural gas generator market benefits from this trend as service providers offer a range of solutions, including parts replacement, system upgrades, and technology retrofits. These services extend the life of generators, improve their efficiency, and enable compliance with evolving emissions regulations.

### Expansion of Distributed Energy Systems

The global shift toward distributed energy systems, where power generation is decentralized and located closer to end-users, is another driving force behind the aftermarket natural gas generator market. Distributed energy systems, which often include combined heat and power (CHP) applications, are gaining popularity in various sectors, such as healthcare, manufacturing, and data centers.

Natural gas generators play a vital role in distributed energy systems due to their ability to efficiently generate electricity and capture waste heat for heating or cooling purposes. As more businesses and institutions adopt these systems, the demand for aftermarket services to maintain and optimize natural gas generators within these setups is expected to increase.

### Resilience and Disaster Preparedness Initiatives

Increasing concerns about the vulnerability of critical infrastructure to natural disasters and other disruptions are prompting organizations to invest in resilience and disaster preparedness initiatives. Natural gas generators are a crucial component of such initiatives, providing a reliable source of backup power during emergencies.

In response to these concerns, governments, utilities, and businesses are actively upgrading and expanding their backup power infrastructure. This includes the retrofitting and maintenance of existing natural gas generators to ensure they are ready to provide continuous power when needed. The aftermarket natural gas generator market benefits from this heightened focus on resilience and disaster preparedness.

## Technological Advancements and Digitalization

Advancements in technology and digitalization are transforming the aftermarket natural gas generator market. The integration of IoT (Internet of Things) and data analytics capabilities allows for real-time monitoring, predictive maintenance, and remote diagnostics of natural gas generators. This digitalization trend enhances the overall reliability and efficiency of generator systems.

Furthermore, digital tools enable service providers to offer proactive maintenance services, reducing end-user downtime and maintenance costs. As businesses seek to optimize their operations and reduce unplanned outages, the adoption of these advanced technologies within the aftermarket natural gas generator market is expected to continue growing.

In conclusion, the global aftermarket natural gas generator market is being driven by a combination of factors, including the need for reliable backup power, environmental concerns, aging generator fleets, distributed energy systems, resilience initiatives, and technological advancements. These drivers collectively contribute to the continued growth and expansion of the aftermarket natural gas generator market across various industries and applications.

## Government Policies are Likely to Propel the Market

### Emission Standards and Environmental Regulations

One of the primary government policies shaping the global aftermarket natural gas generator market is the implementation of stringent emission standards and environmental regulations. Governments worldwide are increasingly focused on reducing greenhouse gas emissions and air pollution to combat climate change and improve air quality. To achieve these goals, they have established strict limits on emissions from power generation sources, including natural gas generators.

These regulations drive the demand for emissions control technologies and services in the aftermarket natural gas generator market. Businesses and institutions are required to retrofit their existing generators to meet the latest emission standards, leading to investments in emission reduction technologies such as selective catalytic reduction (SCR) systems and exhaust gas recirculation (EGR) systems. Additionally, governments may offer incentives or subsidies to encourage compliance with these regulations, further boosting the aftermarket market.

## Energy Efficiency and Cogeneration Incentives

Governments around the world are promoting energy efficiency and cogeneration through various incentives and policies. Cogeneration, also known as combined heat and power (CHP), involves the simultaneous generation of electricity and useful heat from the same energy source, such as a natural gas generator. CHP systems are highly efficient and can significantly reduce energy waste.

To encourage the adoption of CHP systems and improve overall energy efficiency, governments may offer tax credits, grants, or other financial incentives to businesses and institutions. These policies stimulate the aftermarket natural gas generator market by driving investments in CHP retrofits, upgrades, and maintenance services to enhance the efficiency and performance of existing generators.

## Renewable Energy Integration and Grid Stability

In many regions, governments are actively promoting the integration of renewable energy sources such as wind and solar into the power grid. While renewable energy is environmentally friendly, it can be intermittent and unpredictable. As a result, natural gas generators are increasingly used to provide grid stability and backup power during periods of low renewable energy generation.

Government policies may encourage the installation of natural gas generators as part of the grid infrastructure to ensure reliability and reduce the risk of power outages. These policies often include incentives for businesses and utilities to invest in natural gas generator installations and aftermarket services to maintain and upgrade these assets.

## Energy Security and Resilience Initiatives

Governments recognize the critical role of energy security and resilience in safeguarding their economies and infrastructure. In response to the growing threats posed by natural disasters, cyberattacks, and other disruptions, governments may enact policies that require businesses and critical facilities to have reliable backup power sources, including natural gas generators.

To comply with these policies, organizations invest in aftermarket natural gas generator solutions to enhance their energy security and resilience. Governments may offer financial support or tax incentives to facilitate these investments, ensuring a steady

demand for aftermarket services and components in the market.

### Incentives for Distributed Generation

Distributed generation refers to the generation of electricity at or near the point of consumption, often using natural gas generators. Governments may implement policies to encourage the deployment of distributed generation systems to reduce strain on the central grid, improve energy reliability, and enhance local energy resilience.

Incentives for distributed generation can include feed-in tariffs, net metering programs, and regulatory frameworks that enable easier integration into the grid. These policies create opportunities for businesses and institutions to invest in natural gas generators and related aftermarket services to meet their energy needs.

### Research and Development Funding

To promote innovation and technological advancement in the aftermarket natural gas generator market, governments may allocate funding for research and development (R&D) initiatives. R&D grants and programs encourage manufacturers, service providers, and academic institutions to develop new technologies, improve efficiency, and enhance the environmental performance of natural gas generators.

These policies not only drive technological advancements but also create a competitive landscape in the aftermarket market, as companies strive to offer cutting-edge solutions that align with government priorities.

In conclusion, government policies play a significant role in shaping the global aftermarket natural gas generator market. Emission standards, energy efficiency incentives, renewable energy integration, energy security initiatives, incentives for distributed generation, and R&D funding all influence the demand for aftermarket services and components. As governments continue to address environmental, energy, and resilience challenges, these policies will remain critical drivers of the aftermarket natural gas generator market's growth and evolution.

### Key Market Challenges

#### Evolving Emission Standards and Regulatory Compliance

One of the foremost challenges facing the global aftermarket natural gas generator

market is the evolving landscape of emission standards and regulatory compliance. Governments and environmental agencies worldwide are continuously tightening their regulations to curb emissions of greenhouse gases and other pollutants from power generation sources, including natural gas generators. This dynamic regulatory environment poses several challenges to both generator owners and aftermarket service providers.

Firstly, staying compliant with the latest emission standards requires ongoing investments in emission control technologies and retrofitting existing generators. These technologies can be costly, and the constant need for upgrades can strain the budgets of businesses and institutions. Moreover, navigating the complex web of regional, national, and international emissions regulations can be daunting, leading to compliance uncertainties and potential fines for non-compliance.

Secondly, the pace of regulatory change can be rapid, making it challenging for aftermarket service providers to keep up with the latest requirements. Service providers must continually adapt their offerings to meet new emission standards, which may involve reengineering existing solutions or developing entirely new technologies. This adaptability requires substantial research and development investments, potentially impacting profitability.

Another issue arises when different regions adopt disparate emission standards, creating a patchwork of compliance requirements. This fragmentation can complicate aftermarket service offerings and increase costs, as service providers may need to tailor solutions for specific markets, hindering economies of scale.

Lastly, emissions regulations may incentivize generator owners to explore alternative power sources or technologies. This shift can reduce the demand for aftermarket natural gas generator services, leading to increased competition within the aftermarket market and potentially lower profit margins for service providers.

To address these challenges, businesses, governments, and aftermarket service providers must collaborate to develop standardized emissions compliance solutions, streamline regulatory processes, and provide incentives for clean energy adoption while ensuring a fair and competitive aftermarket market.

### Rapid Technological Advancements and Obsolescence

The rapid pace of technological advancements presents another significant challenge

for the global aftermarket natural gas generator market. While technological innovation drives progress and offers enhanced performance and efficiency, it also introduces the risk of obsolescence for existing generators and aftermarket components.

Natural gas generator technology continues to evolve, with manufacturers introducing newer models featuring improved efficiency, lower emissions, and enhanced digital capabilities. These advancements often render older generators and associated components obsolete or less competitive, forcing generator owners to consider replacements or extensive upgrades.

This challenge extends to aftermarket service providers, who must continually adapt their offerings to accommodate the latest generator technologies. For example, service providers may need to invest in training and equipment to work with newer generator models and associated control systems. The rapid turnover of technology can strain their resources and impact their ability to service older generators effectively.

Additionally, as generator technology evolves, compatibility issues may arise when retrofitting or upgrading older generators with newer components or control systems. Ensuring seamless integration and optimal performance can be challenging, leading to potential reliability and efficiency concerns.

To address the challenge of rapid technological advancements and obsolescence, collaboration among generator manufacturers, aftermarket service providers, and end-users is essential. Stakeholders can work together to establish standardized retrofitting and upgrading procedures, develop cross-compatible components, and provide training and support to navigate technological transitions smoothly. This collaboration can help sustain the viability of the aftermarket natural gas generator market while ensuring that generator owners can maximize the lifespan and performance of their assets in a rapidly changing technological landscape.

## Segmental Insights

### Service & Maintenance Insights

The Service & Maintenance segment had the largest market share in 2022 & expected to maintain it in the forecast period. Natural gas generators are critical assets that provide backup power and support various applications, including industrial, commercial, and residential settings. Ensuring the reliable and continuous operation of these generators is paramount. Regular service and maintenance activities help prevent



breakdowns, reduce downtime, and extend the operational lifespan of these assets, making them more cost-effective in the long run. Environmental regulations and emissions standards are becoming increasingly stringent worldwide. Natural gas generators must comply with these standards to reduce their environmental impact. Service and maintenance activities include emissions-related inspections, adjustments, and servicing of emissions control systems. Staying compliant with these regulations is essential to avoid penalties and maintain a positive environmental reputation. Preventive maintenance is a proactive approach to identify and address potential issues before they lead to costly breakdowns. Regular inspections, lubrication, and parts replacement ensure that natural gas generators operate efficiently and reliably. This approach helps organizations avoid unexpected downtime and associated losses in productivity and revenue. As energy efficiency gains importance in the global energy landscape, service and maintenance activities contribute to optimizing the performance of natural gas generators. Technicians can identify areas where improvements can be made to enhance the generator's efficiency, reducing fuel consumption and operational costs. Businesses and critical infrastructure facilities cannot afford power disruptions. Service and maintenance activities minimize the risk of generator failure during crucial moments, such as power outages or emergencies. This reliability ensures business continuity and helps maintain essential services, such as hospitals, data centers, and manufacturing plants. Service and maintenance activities also involve keeping detailed records of a generator's history, including service logs, parts replacements, and performance data. This information helps organizations effectively manage their generator assets, plan for future maintenance needs, and make informed decisions about upgrades or replacements. Service and maintenance contracts provide customers with peace of mind, knowing that their generators are in capable hands. Many organizations prefer to have ongoing service agreements with experienced technicians who are familiar with their specific generators. This confidence in service providers reinforces the dominance of service and maintenance activities. Compared to the cost of emergency repairs or generator replacement, regular service and maintenance are cost-effective measures. Investing in preventive maintenance and routine servicing can significantly reduce the overall operational expenses associated with natural gas generators.

## Industrial Insights

The Industrial segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Industries, such as manufacturing, mining, oil and gas, and chemical processing, rely heavily on a continuous and reliable power supply to maintain operations. Even brief power interruptions can lead to

significant financial losses, production downtime, and safety hazards. Natural gas generators are a trusted source of backup and primary power in these sectors, ensuring uninterrupted operations and minimizing the risk of costly disruptions. Industrial facilities typically have high power demands, often requiring large-capacity generators. Natural gas generators can be scaled to meet these demands efficiently, making them well-suited for industrial applications. The larger generator sizes commonly used in industry contribute to a significant market share in terms of both generator installations and aftermarket services. Industrial environments are often harsh and demanding, with generators operating in extreme temperatures, remote locations, or hazardous areas. This challenging operating environment necessitates regular maintenance, servicing, and component replacements to ensure the generators' reliability and longevity. As a result, industrial applications generate a substantial demand for aftermarket services to keep generators running optimally. Industrial sectors are subject to stringent emissions regulations and safety standards. Natural gas generators offer advantages in terms of lower emissions compared to other power sources like diesel or coal. However, compliance with emissions regulations requires specialized emissions control systems and regular maintenance to meet or exceed environmental standards. This further drives the demand for aftermarket services in the industrial sector. Industrial facilities often require customized solutions and upgrades to meet specific operational requirements. This includes the installation of advanced control systems, emissions control technologies, and integration with complex industrial processes. Aftermarket service providers offer tailored solutions to meet these unique needs, driving the demand for customization and upgrade services. The cost of downtime in industrial applications can be exorbitant, including losses in production, missed deadlines, and potential damage to equipment. Investing in preventive maintenance and servicing of natural gas generators is seen as a cost-effective strategy to minimize the risk of unscheduled shutdowns. The ongoing global expansion of industrial activities in emerging economies has led to increased demand for backup power solutions, including natural gas generators. These regions often face challenges with grid reliability, making backup power a necessity in industrial operations.

## Regional Insights

### North America

North America held the largest market for aftermarket natural gas generators, accounting for over 35% of the global market in 2022. The region is home to a number of prominent natural gas generator OEMs and EPC players, such as Caterpillar, Cummins, and Generac Power Systems. The U.S. is the largest market for aftermarket

natural gas generators in North America, followed by Canada.

The North American aftermarket natural gas generator market is driven by a number of factors, including the presence of prominent natural gas generator OEMs and EPC players, large shale gas reserves, and developed infrastructure for transportation of natural gas.

The U.S. is the largest market for aftermarket natural gas generators in North America, followed by Canada.

The major applications of aftermarket natural gas generators in North America include commercial, industrial, and residential.

## Europe

Europe held the second-largest market for aftermarket natural gas generators, accounting for over 25% of the global market in 2022. The region is home to a number of major natural gas generator manufacturers, such as Rolls-Royce, Siemens AG, and Wartsila. Germany is the largest market for aftermarket natural gas generators in Europe, followed by the U.K. and France.

The European aftermarket natural gas generator market is driven by a number of factors, including the presence of major natural gas generator manufacturers, a large installed base of natural gas generators, and stringent environmental regulations.

Germany is the largest market for aftermarket natural gas generators in Europe, followed by the U.K. and France.

The major applications of aftermarket natural gas generators in Europe include commercial, industrial, and power generation.

## Asia Pacific

Asia Pacific is the fastest-growing market for aftermarket natural gas generators, with a CAGR of over 12% expected from 2023 to 2030. The region is witnessing rapid economic growth and industrialization, which is driving the demand for natural gas generators. China is the largest market for aftermarket natural gas generators in Asia Pacific, followed by India and Japan.

The Asia Pacific aftermarket natural gas generator market is the fastest-growing market, with a CAGR of over 12% expected from 2023 to 2030.

The growth of the market is being driven by rapid economic growth and industrialization in the region.

China is the largest market for aftermarket natural gas generators in Asia Pacific, followed by India and Japan.

The major applications of aftermarket natural gas generators in Asia Pacific include commercial, industrial, and power generation.

### Key Market Players

Caterpillar Inc.

Cummins Inc.

Generac Holdings Inc.

GE Energy Power

Siemens AG

Wartsila Corporation

Yanmar Co., Ltd.

MTU Onsite Energy Corp.

Rolls-Royce Holdings plc

Kohler Co.

### Report Scope:

In this report, the Global Aftermarket Natural Gas Generator Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Aftermarket Natural Gas Generator Market, By Type:

Service & Maintenance

Repair

Overhaul & Remanufacturing

Upgrades & Modifications

### Aftermarket Natural Gas Generator Market, By Application:

Commercial

Industrial

Residential

### Aftermarket Natural Gas Generator Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Aftermarket Natural Gas Generator Market.

### Available Customizations:

Global Aftermarket Natural Gas Generator market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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  - 13.7.3. Recent Developments
  - 13.7.4. Key Personnel/Key Contact Person

13.7.5. Key Product/Services Offered

13.8. MTU Onsite Energy Corp.

13.8.1. Business Overview

13.8.2. Key Revenue and Financials

13.8.3. Recent Developments

13.8.4. Key Personnel/Key Contact Person

13.8.5. Key Product/Services Offered

13.9. Rolls-Royce Holdings plc

13.9.1. Business Overview

13.9.2. Key Revenue and Financials

13.9.3. Recent Developments

13.9.4. Key Personnel/Key Contact Person

13.9.5. Key Product/Services Offered

13.10. Kohler Co.

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

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