

Gas Gensets Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Fuel (Natural Gas, Biogas, and Others), By Power Rating (Upto 100 KVA, 100 to 350 KVA, 350-1000 KVA, and Above 1000 KVA), By Application (Standby, Peak Shaving, and Continuous), By End User (Industrial, Commercial, and Residential), By Region, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

The Global Gas Gensets Market, with a valuation of USD 11.59 billion in 2022, is poised for robust growth in the forecast period, marked by an anticipated Compound Annual Growth Rate (CAGR) of 4.77% through 2028. This growth is primarily attributed to the increasing global demand for electricity, which has led to a substantial adoption of gas generators as a reliable energy source, thereby driving the expansion of the global market.

Furthermore, this growth is further accelerated by increased investments and favorable government policies concerning emission norms and regulations, both in developed and developing economies. Additionally, the market benefits from the availability of generators in various forms and capacities, catering to a wide range of demand, thereby fostering the continued growth of the global gas gensets market.

Key Market Drivers

Environmental Regulations and Emissions Reduction Initiatives

The global gas gensets market is significantly influenced by rigorous environmental regulations and emissions reduction initiatives. As concerns regarding climate change and air quality continue to escalate, governments and international organizations are implementing stricter emission limits on power generation sources, especially those utilizing fossil fuels like diesel and coal.

Gas gensets, operating on natural gas or other cleaner-burning gases, are considered a more environmentally friendly alternative to conventional diesel gensets. They emit significantly lower amounts of greenhouse gases, such as carbon dioxide (CO₂) and nitrogen oxides (NO_x), and virtually no particulate matter compared to their diesel counterparts.

The Paris Agreement, aiming to restrict global warming to well below 2 degrees Celsius above pre-industrial levels, serves as one of the primary regulatory drivers. Signatory countries face mounting pressure to decrease their carbon emissions, leading to a transition towards cleaner energy sources, including natural gas.

Furthermore, regional and local governments have introduced emission reduction targets and incentives to promote the adoption of gas gensets. For instance, many cities are implementing stricter emission standards within their jurisdictions and offering incentives like tax breaks or subsidies to businesses and industries choosing gas gensets for backup or distributed power generation.

Consequently, industries with critical power requirements such as data centers, healthcare facilities, and manufacturing plants are increasingly embracing gas gensets to fulfill their electricity demands while complying with environmental regulations. This trend is expected to continue propelling the growth of the global gas gensets market.

In summary, the adoption of gas gensets in the global market is driven by stringent environmental regulations and emissions reduction initiatives. Their ability to provide reliable power generation with reduced emissions aligns with the global efforts to combat climate change and enhance air quality.

Growing Demand for Distributed Power Generation

The global market for gas gensets is currently witnessing robust growth, primarily driven by the increasing demand for distributed power generation solutions. Distributed power generation refers to the production of electricity on a smaller scale, often closer to the point of consumption, as opposed to large centralized power plants located far from end-

users. This shift in power generation patterns is influenced by several key factors.

First and foremost, the need for reliable and uninterrupted power supply is of utmost importance across various sectors, including healthcare, data centers, telecommunications, and critical manufacturing processes. Gas gensets offer a dependable backup power source that seamlessly activates during grid outages or instances of compromised grid stability.

Secondly, the global expansion of industrial and commercial activities, particularly in emerging economies, has resulted in an increased demand for power. Many businesses and industries are opting for distributed power generation utilizing gas gensets to ensure energy security and reduce reliance on centralized grids, which are susceptible to supply disruptions.

Thirdly, the growth of the renewable energy sector, specifically solar and wind power, has created opportunities for gas gensets to complement intermittent renewables. Gas gensets serve as a reliable backup power source when renewable energy generation is insufficient, guaranteeing a consistent supply of electricity.

Moreover, the rise of microgrids, which are self-contained energy systems that can operate independently or in conjunction with the main grid, often relies on gas gensets as a core component. These microgrids provide resilience and energy security for communities, campuses, and remote locations.

The demand for distributed power generation solutions is further driven by the modular and scalable nature of gas gensets. Businesses can expand their power generation capacity as required by adding additional genset units, making it a flexible and cost-effective solution.

In conclusion, the escalating demand for distributed power generation is a significant catalyst for the global gas gensets market. These versatile generators offer a reliable and scalable solution to ensure uninterrupted power supply across various applications and industries.

Natural Gas Availability and Competitive Pricing

The availability and competitive pricing of natural gas play pivotal roles in driving the global gas gensets market. Natural gas, as a versatile and abundant fossil fuel, finds applications in power generation, heating, and industrial processes. Several factors

contribute to the prominence of natural gas in the energy landscape and its impact on the gas gensets market.

Primarily, the global production of natural gas has been on the rise, propelled by advancements in extraction technologies such as hydraulic fracturing (fracking) and liquefied natural gas (LNG) exports. This increased availability has resulted in stable and competitive pricing, rendering natural gas an appealing fuel source for power generation.

Compared to other fossil fuels like coal and diesel, natural gas often proves more cost-effective, with pricing that tends to be less volatile. This cost advantage makes gas gensets a financially viable choice for businesses and industries seeking reliable power solutions.

Moreover, natural gas is widely regarded as a cleaner-burning fuel, emitting fewer pollutants and greenhouse gases. This aligns with environmental regulations and emissions reduction goals, further incentivizing the use of gas gensets in regions with stringent air quality and emissions standards.

Furthermore, the global expansion of natural gas infrastructure, including pipelines and distribution networks, has facilitated easier access to this fuel source for end-users. This infrastructure development supports the widespread adoption of gas gensets, particularly in regions where natural gas is abundant and well-connected to end-users.

Natural gas can be sourced domestically or through international trade, providing countries with energy security and reducing dependence on imported oil. This aspect of energy independence makes natural gas an appealing option for governments and industries looking to diversify their energy sources and enhance energy resilience.

In summary, the availability and competitive pricing of natural gas have a significant impact on the global gas gensets market. The stable pricing, abundance of natural gas, and its environmental advantages make it an attractive choice for businesses, industries, and governments seeking reliable and cost-effective power generation solutions. This factor is expected to continue supporting the growth of the gas gensets market in the years to come.

Key Market Challenges

Infrastructure and Fuel Supply

One of the key challenges in the global gas gensets market is to ensure the availability of infrastructure and a consistent supply of natural gas or alternative gases required for the operation of gas gensets. The viability of gas gensets as a power generation solution is directly dependent on the accessibility of the necessary fuel sources and associated infrastructure.

In regions with limited natural gas infrastructure, the installation and operation of gas gensets can be prohibitively expensive. The establishment of pipelines, storage facilities, and distribution networks to deliver natural gas to end-users may require significant investments and time. Moreover, remote or off-grid locations may lack the infrastructure needed for the transportation and storage of natural gas, posing challenges for the deployment of gas gensets in such areas.

In addition to infrastructure constraints, the availability and pricing of natural gas can be influenced by fluctuations and geopolitical factors. Supply disruptions caused by geopolitical conflicts or production issues in gas-producing regions can impact the reliability of gas gensets as a power source. Price volatility can also affect the cost-effectiveness of natural gas, potentially making it less competitive compared to other fuels.

To address this challenge, stakeholders in the gas gensets market need to collaborate with governments and energy infrastructure providers to expand gas infrastructure and ensure a stable supply chain. The development of alternative gas sources, such as biogas and hydrogen, can also help reduce reliance on natural gas and enhance the operational flexibility of gas gensets.

Environmental Concerns and Emission Reduction Goals

While gas gensets are generally acknowledged as a cleaner-burning alternative to diesel generators, they still release greenhouse gases, primarily carbon dioxide (CO₂). Meeting stringent emissions reduction goals and environmental regulations poses a significant challenge for the gas gensets market.

Governments and international organizations are increasingly focused on reducing carbon emissions to combat climate change. Consequently, there is mounting pressure to restrict the use of fossil fuels in power generation, including natural gas. Despite gas gensets producing lower emissions compared to many other forms of power generation, they are not entirely emissions-free.

To tackle this challenge, gas genset manufacturers and users are exploring technologies such as carbon capture and utilization (CCU) and carbon offset programs to mitigate their environmental impact. Additionally, there is a drive to develop and adopt renewable gases, such as green hydrogen or biomethane, as alternative fuels for gas gensets, thereby significantly reducing their carbon footprint.

Furthermore, complying with emissions regulations often necessitates integrating emissions control systems, such as selective catalytic reduction (SCR) and exhaust gas recirculation (EGR), into gas gensets. These technologies introduce complexity and cost to the genset systems, posing a challenge for manufacturers and users in their search for cost-effective solutions.

Competition from Alternative Power Sources

The global gas gensets market encounters competition from various alternative power sources and technologies, including renewable energy systems, energy storage solutions, and grid interconnections. These alternatives offer different levels of sustainability, reliability, and cost-effectiveness, posing a challenge to the widespread adoption of gas gensets.

Renewable energy sources such as solar and wind power are gaining prominence and are often regarded as environmentally friendly options. With advancements in energy storage technologies, renewable energy systems can provide dependable power even without grid connection or backup generators. Consequently, some end-users may choose renewable energy solutions over gas gensets, particularly in regions abundant in renewable resources.

Moreover, the expansion of grid infrastructure and grid interconnections enables businesses and industries to access electricity from centralized power plants, reducing the need for on-site generation. This trend can limit the market potential for gas gensets, especially in areas with reliable grid services.

To address this challenge, gas genset manufacturers and stakeholders must emphasize the unique advantages of gas gensets, such as their reliability, fast startup times, and suitability for grid stability support. They should also explore hybrid systems that combine gas gensets with renewable energy sources and energy storage to offer flexible and sustainable power solutions.

In conclusion, the global gas gensets market faces challenges related to infrastructure and fuel supply, environmental concerns, and competition from alternative power sources. Addressing these challenges requires a collaborative effort among industry stakeholders, governments, and technology innovators to ensure the continued growth and relevance of gas gensets in the evolving energy landscape.

Key Market Trends

Transition to Renewable Gases as Fuel Sources

One notable trend in the global gas gensets market is the shift towards renewable gases as fuel sources. Renewable gases, such as green hydrogen, biomethane, and synthetic natural gas (SNG), are gaining momentum as cleaner and more sustainable alternatives to traditional fossil fuels like natural gas and diesel.

Green hydrogen, produced by using renewable energy sources like wind and solar power to electrolyze water, is emerging as a promising fuel for gas gensets. When utilized as a fuel, green hydrogen generates zero carbon emissions, making it an environmentally friendly choice. Gas gensets running on green hydrogen can serve as reliable backup power sources for critical infrastructure while contributing to decarbonization efforts.

Biomethane, derived from organic waste and agricultural residues through anaerobic digestion or gasification, is another renewable gas that is gaining popularity. Biomethane can be injected into existing natural gas pipelines and used as a fuel for gas gensets. It offers a sustainable way to produce energy while addressing waste management and reducing methane emissions from landfills.

Synthetic natural gas (SNG) is produced through a process called power-to-gas, where surplus electricity, often from renewable sources, is utilized to convert carbon dioxide (CO₂) and water into synthetic natural gas. SNG can be stored and distributed like natural gas, making it compatible with existing gas genset infrastructure.

The transition to renewable gases aligns with global efforts to reduce greenhouse gas emissions and combat climate change. Gas genset manufacturers and users are exploring ways to adapt their systems to accommodate these cleaner fuels, which can expand the market for gas gensets in a sustainable manner.

Integration with Microgrid and Energy Storage Systems

Another notable trend in the global gas gensets market is the increasing integration of gas gensets with microgrid and energy storage systems. Microgrids are self-contained, localized energy systems that can operate independently or in conjunction with the main grid. They often incorporate a combination of power generation sources, including gas gensets, renewable energy, and energy storage.

Gas gensets play a vital role in microgrids by providing reliable and continuous power generation. They can serve as the primary energy source during grid outages or periods of high demand. The integration of gas gensets with energy storage systems, such as batteries, enhances their efficiency and flexibility.

Energy storage systems complement gas gensets by providing rapid response and grid stabilization capabilities. Batteries can absorb excess energy from gas gensets during periods of low demand and release it when demand is high, optimizing fuel consumption and reducing emissions.

Moreover, the intelligent control systems employed in microgrids enable seamless switching between different power sources, ensuring a dependable and uninterrupted energy supply. This trend is particularly relevant in remote or off-grid areas, industrial complexes, and critical infrastructure facilities.

The integration of gas gensets with microgrid and energy storage systems supports energy resilience, enhances grid stability, and reduces reliance on centralized power plants. It also enables better management of intermittent renewable energy sources by mitigating fluctuations in supply and demand.

Segmental Insights

Power Rating Insights

The Upto 100 KVA segment emerged as the dominant player in the global market for Gas Gensets in 2022. Gas gensets with a power range below 100 KVA offer versatile and cost-effective solutions for backup power, remote locations, and areas with unreliable grid infrastructure. Specifically, natural gas gensets stand out due to the stable pricing and availability of natural gas compared to diesel fuel.

The compact design of these gensets allows for easy transportation and installation. Technological advancements have made sub-100 KVA gas gensets more efficient and

user-friendly. Integrated digital control systems enable remote monitoring, automatic startup during power interruptions, and optimization of fuel efficiency.

Furthermore, smaller gas gensets can be seamlessly integrated into microgrids and hybrid power systems. These integrated systems combine gensets with renewables and energy storage, ensuring a reliable power supply while optimizing fuel consumption and reducing emissions. However, it is important for users of sub-100 KVA gas gensets to adhere to local regulations and standards pertaining to emissions, noise levels, and safety.

In emerging markets and remote areas with limited access to the central grid, sub-100 KVA gas gensets play a pivotal role in providing electricity to residential homes, small businesses, and community facilities. The reliability and resilience offered by these gensets are crucial for businesses operating in regions with unstable power supply or frequent blackouts.

Furthermore, the rental market for sub-100 KVA gas gensets is experiencing significant growth, driven by the demand for temporary power solutions at events, construction sites, and disaster-stricken areas.

In conclusion, the sub-100 KVA gas gensets market exhibits versatility, cost-effectiveness, and a wide range of applications, catering to residential use, small businesses, and remote locations. Technological advancements, environmental considerations, and the need for reliable power supply in diverse settings contribute to the growth and relevance of gas gensets within this power range.

End User Insights

The Commercial segment is projected to experience rapid growth during the forecast period. These facilities necessitate reliable and uninterrupted power to sustain operations, safeguard data, and ensure occupants' comfort and safety. Data centers, in particular, rely heavily on gas gensets to ensure continuous operations and protect critical data. Gas gensets play a pivotal role in enhancing the resilience of commercial facilities by providing immediate backup power when required. Gas gensets fueled by natural gas or renewable gases are considered more environmentally friendly alternatives to diesel gensets. They emit fewer pollutants and align with sustainability objectives.

The cost-efficiency of gas gensets is further enhanced by reduced maintenance

expenses and longer operational lifespans. Some commercial facilities utilize gas gensets for peak shaving during periods of high electricity demand, resulting in reduced peak power charges. Advanced control systems enable seamless integration with building automation systems and demand response programs. The popularity of Combined Heat and Power (CHP) systems, also known as cogeneration, is increasing. These systems generate electricity and useful heat simultaneously, enhancing overall energy efficiency in commercial buildings.

Compliance with local, state, and federal regulations is crucial for commercial gas genset users. Ensuring gensets meet emissions standards and noise regulations is essential to avoid potential fines or legal issues. Gas gensets fueled by renewable gases such as biogas or green hydrogen support these efforts by providing cleaner power generation. Energy efficiency certifications, such as ENERGY STAR and LEED (Leadership in Energy and Environmental Design), play a significant role in driving the adoption of gas gensets. Commercial facilities with high energy efficiency ratings prefer gensets that are environmentally conscious.

Regional Insights

North America emerged as the dominant player in the global Gas Gensets market in 2022, holding the largest market share. Natural gas gensets hold a prominent position in the North American market, driven by the region's abundant supply of natural gas for power generation. Grid reliability and resilience are key priorities in North America, particularly in areas susceptible to severe weather events like hurricanes and winter storms.

Furthermore, stringent environmental regulations are compelling industries and utilities in North America to reduce their carbon footprint. As a result, there is a transition towards renewable gases, including green hydrogen and biomethane, as fuel sources for gas gensets.

Gas gensets play a crucial role in microgrid systems deployed in diverse settings such as communities, universities, military bases, and industrial complexes. These microgrids integrate gas gensets with renewable energy sources and energy storage, benefiting from ongoing technological advancements. Manufacturers are actively developing more efficient and environmentally friendly gensets equipped with advanced control systems and digital monitoring capabilities.

Moreover, gas gensets serve as valuable assets for charging batteries during periods of

low electricity demand and providing backup power when renewable energy sources are unavailable. They are extensively utilized in remote and off-grid areas of North America, including remote communities, mining operations, and oil and gas facilities.

Key Market Players

Generac Holdings Inc.

Caterpillar Inc.

AKSA Power Generation

Cooper Corporation

Mitsubishi Heavy Industries Ltd.

Kohler Co.

Cummins Inc.

General Electric Company

Perkins Engines Company Limited

Toshiba Corporation

Report Scope:

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

Gas Gensets Market, By Fuel:

Natural Gas

Biogas

Others

Gas Gensets Market, By Power Rating:

Upto 100 KVA

100 to 350 KVA

350-1000 KVA

Above 1000 KVA

Gas Gensets Market, By Application:

Standby

Peak Shaving

Continuous

Gas Gensets Market, By End User:

Industrial

Commercial

Residential

Gas Gensets 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

Competitive Landscape

Gas Gensets Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Fuel (Natural...

Company Profiles: Detailed analysis of the major companies present in the Global Gas Gensets Market.

Available Customizations:

Global Gas Gensets 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL GAS GENSETS MARKET

5. VOICE OF CUSTOMER

6. GLOBAL GAS GENSETS MARKET OVERVIEW

7. GLOBAL GAS GENSETS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast

- 7.2.1. By Fuel (Natural Gas, Biogas, and Others)
- 7.2.2. By Power Rating (Upto 100 KVA, 100 to 350 KVA, 350-1000 KVA, and Above 1000 KVA)
- 7.2.3. By Application (Standby, Peak Shaving, and Continuous)
- 7.2.4. By End User (Industrial, Commercial, and Residential)
- 7.2.5. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)
- 7.3. By Company (2022)
- 7.4. Market Map

8. NORTH AMERICA GAS GENSETS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Fuel
 - 8.2.2. By Power Rating
 - 8.2.3. By Application
 - 8.2.4. By End User
 - 8.2.5. By Country
- 8.3. North America: Country Analysis
 - 8.3.1. United States Gas Gensets Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Fuel
 - 8.3.1.2.2. By Power Rating
 - 8.3.1.2.3. By Application
 - 8.3.1.2.4. By End User
 - 8.3.2. Canada Gas Gensets Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Fuel
 - 8.3.2.2.2. By Power Rating
 - 8.3.2.2.3. By Application
 - 8.3.2.2.4. By End User
 - 8.3.3. Mexico Gas Gensets Market Outlook
 - 8.3.3.1. Market Size & Forecast

- 8.3.3.1.1. By Value
- 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Fuel
 - 8.3.3.2.2. By Power Rating
 - 8.3.3.2.3. By Application
 - 8.3.3.2.4. By End User

9. EUROPE GAS GENSETS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Fuel
 - 9.2.2. By Power Rating
 - 9.2.3. By Application
 - 9.2.4. By End User
 - 9.2.5. By Country
- 9.3. Europe: Country Analysis
 - 9.3.1. Germany Gas Gensets Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Fuel
 - 9.3.1.2.2. By Power Rating
 - 9.3.1.2.3. By Application
 - 9.3.1.2.4. By End User
 - 9.3.2. France Gas Gensets Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Fuel
 - 9.3.2.2.2. By Power Rating
 - 9.3.2.2.3. By Application
 - 9.3.2.2.4. By End User
 - 9.3.3. United Kingdom Gas Gensets Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Fuel

- 9.3.3.2.2. By Power Rating
- 9.3.3.2.3. By Application
- 9.3.3.2.4. By End User
- 9.3.4. Italy Gas Gensets Market Outlook
 - 9.3.4.1. Market Size & Forecast
 - 9.3.4.1.1. By Value
 - 9.3.4.2. Market Share & Forecast
 - 9.3.4.2.1. By Fuel
 - 9.3.4.2.2. By Power Rating
 - 9.3.4.2.3. By Application
 - 9.3.4.2.4. By End User
- 9.3.5. Spain Gas Gensets Market Outlook
 - 9.3.5.1. Market Size & Forecast
 - 9.3.5.1.1. By Value
 - 9.3.5.2. Market Share & Forecast
 - 9.3.5.2.1. By Fuel
 - 9.3.5.2.2. By Power Rating
 - 9.3.5.2.3. By Application
 - 9.3.5.2.4. By End User

10. SOUTH AMERICA GAS GENSETS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Fuel
 - 10.2.2. By Power Rating
 - 10.2.3. By Application
 - 10.2.4. By End User
 - 10.2.5. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Gas Gensets Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Fuel
 - 10.3.1.2.2. By Power Rating
 - 10.3.1.2.3. By Application
 - 10.3.1.2.4. By End User

10.3.2. Colombia Gas Gensets Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Fuel

10.3.2.2.2. By Power Rating

10.3.2.2.3. By Application

10.3.2.2.4. By End User

10.3.3. Argentina Gas Gensets Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Fuel

10.3.3.2.2. By Power Rating

10.3.3.2.3. By Application

10.3.3.2.4. By End User

11. MIDDLE EAST & AFRICA GAS GENSETS MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Fuel

11.2.2. By Power Rating

11.2.3. By Application

11.2.4. By End User

11.2.5. By Country

11.3. Middle East & Africa: Country Analysis

11.3.1. Saudi Arabia Gas Gensets Market Outlook

11.3.1.1. Market Size & Forecast

11.3.1.1.1. By Value

11.3.1.2. Market Share & Forecast

11.3.1.2.1. By Fuel

11.3.1.2.2. By Power Rating

11.3.1.2.3. By Application

11.3.1.2.4. By End User

11.3.2. UAE Gas Gensets Market Outlook

11.3.2.1. Market Size & Forecast

11.3.2.1.1. By Value

11.3.2.2. Market Share & Forecast

11.3.2.2.1. By Fuel

11.3.2.2.2. By Power Rating

11.3.2.2.3. By Application

11.3.2.2.4. By End User

11.3.2.2.5.

11.3.3. South Africa Gas Gensets Market Outlook

11.3.3.1. Market Size & Forecast

11.3.3.1.1. By Value

11.3.3.2. Market Share & Forecast

11.3.3.2.1. By Fuel

11.3.3.2.2. By Power Rating

11.3.3.2.3. By Application

11.3.3.2.4. By End User

12. ASIA PACIFIC GAS GENSETS MARKET OUTLOOK

12.1. Market Size & Forecast

12.1.1. By Fuel

12.1.2. By Power Rating

12.1.3. By Application

12.1.4. By End User

12.1.5. By Country

12.2. Asia-Pacific: Country Analysis

12.2.1. China Gas Gensets Market Outlook

12.2.1.1. Market Size & Forecast

12.2.1.1.1. By Value

12.2.1.2. Market Share & Forecast

12.2.1.2.1. By Fuel

12.2.1.2.2. By Power Rating

12.2.1.2.3. By Application

12.2.1.2.4. By End User

12.2.2. India Gas Gensets Market Outlook

12.2.2.1. Market Size & Forecast

12.2.2.1.1. By Value

12.2.2.2. Market Share & Forecast

12.2.2.2.1. By Fuel

12.2.2.2.2. By Power Rating

12.2.2.2.3. By Application

- 12.2.2.2.4. By End User
- 12.2.3. Japan Gas Gensets Market Outlook
 - 12.2.3.1. Market Size & Forecast
 - 12.2.3.1.1. By Value
 - 12.2.3.2. Market Share & Forecast
 - 12.2.3.2.1. By Fuel
 - 12.2.3.2.2. By Power Rating
 - 12.2.3.2.3. By Application
 - 12.2.3.2.4. By End User
- 12.2.4. South Korea Gas Gensets Market Outlook
 - 12.2.4.1. Market Size & Forecast
 - 12.2.4.1.1. By Value
 - 12.2.4.2. Market Share & Forecast
 - 12.2.4.2.1. By Fuel
 - 12.2.4.2.2. By Power Rating
 - 12.2.4.2.3. By Application
 - 12.2.4.2.4. By End User
- 12.2.5. Australia Gas Gensets Market Outlook
 - 12.2.5.1. Market Size & Forecast
 - 12.2.5.1.1. By Value
 - 12.2.5.2. Market Share & Forecast
 - 12.2.5.2.1. By Fuel
 - 12.2.5.2.2. By Power Rating
 - 12.2.5.2.3. By Application
 - 12.2.5.2.4. By End User

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Generac Holdings Inc.
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments

- 15.1.4. Key Personnel/Key Contact Person
- 15.1.5. Key Product/Services Offered
- 15.2. Caterpillar Inc.
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments
 - 15.2.4. Key Personnel/Key Contact Person
 - 15.2.5. Key Product/Services Offered
- 15.3. AKSA Power Generation
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. Cooper Corporation
 - 15.4.1. Business Overview
 - 15.4.2. Key Revenue and Financials
 - 15.4.3. Recent Developments
 - 15.4.4. Key Personnel/Key Contact Person
 - 15.4.5. Key Product/Services Offered
- 15.5. Mitsubishi Heavy Industries Ltd.
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. Kohler Co.
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. Cummins Inc.
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. General Electric Company

- 15.8.1. Business Overview
- 15.8.2. Key Revenue and Financials
- 15.8.3. Recent Developments
- 15.8.4. Key Personnel/Key Contact Person
- 15.8.5. Key Product/Services Offered
- 15.9. Perkins Engines Company Limited
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel/Key Contact Person
 - 15.9.5. Key Product/Services Offered
- 15.10. Toshiba Corporation
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel/Key Contact Person
 - 15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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