

Small Gas Engines Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Engine Displacement (20-100cc, 101-450cc and 451-650cc), By Application (Gardening, Industrial, Construction and Others), By Equipment (Lawnmower, Chainsaw, Portable Generator, Pressure Washer and Others), By Region, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

The Global Small Gas Engines Market was valued at USD 2.73 billion in 2022 and is growing at a CAGR of 3.79% during the forecast period. The increasing awareness among individuals regarding the rise in carbon dioxide emissions is a significant factor contributing to the growth of this market. Small engines are widely recognized for their fuel efficiency and compliance with government regulations, which further drives their demand in the market. In addition, small gas engines are extensively utilized in construction equipment such as concrete mixers, compactors, and power generators. These engines are renowned for their reliability, power, and fuel efficiency, making them an ideal choice for construction sites with limited access to grid power or fuel sources. The growth in both residential and commercial construction industries directly impacts the demand for small gas engines.

Key Market Drivers

Growing Demand for Outdoor Power Equipment

The global small gas engines market is propelled by the increasing demand for outdoor

power equipment. Outdoor power equipment, such as lawnmowers, leaf blowers, and chainsaws, heavily relies on small gas engines for efficient operation. As urbanization continues to expand, there is a growing need for well-maintained lawns, gardens, and public spaces. Consequently, the sales of outdoor power equipment have surged, thereby boosting the small gas engines market.

One of the primary factors contributing to the rising demand for outdoor power equipment is the growing emphasis on landscaping and lawn care, both in residential and commercial sectors. Homeowners are now investing more in their outdoor spaces, resulting in a higher demand for lawnmowers and other related tools. Similarly, commercial landscaping companies require efficient and reliable equipment to maintain parks, golf courses, and other public spaces. Small gas engines are preferred in these applications due to their power, durability, and ease of use.

Furthermore, the construction industry also heavily relies on small gas engines for various tasks, such as concrete cutting and compaction. With the construction sector witnessing steady growth globally, the demand for small gas engines in construction equipment is also on the rise. These engines provide the necessary power and mobility required for construction machinery, making them an indispensable component in this industry.

In addition to landscaping and construction, the agriculture sector remains a significant driver of the small gas engines market. Farmers rely on small gas engines for a wide range of applications, including tractors, tillers, and irrigation pumps. As the global population continues to grow, there is an increased need for efficient and productive farming practices, leading to higher demand for agricultural equipment powered by small gas engines.

In conclusion, the expanding demand for outdoor power equipment across residential, commercial, and industrial sectors serves as a major driver for the global small gas engines market. This trend is expected to persist as urbanization, landscaping, construction, and agriculture activities continue to grow, creating a sustained market for small gas engines.

Expanding Recreational and Leisure Activities

Another key factor driving the global small gas engines market is the growing range of recreational and leisure activities that rely on small gas-powered equipment. From recreational vehicles (RVs) to boats, snowmobiles, and off-road vehicles, there is a

diverse array of recreational equipment that utilizes small gas engines to provide power and mobility.

The RV industry, for example, has witnessed significant growth in recent years. RVs are equipped with small gas generators that supply electricity, heating, and cooling while on the road or at campgrounds. The increasing popularity of RV travel, particularly in North America, has resulted in a surge in the demand for these vehicles, consequently driving the demand for small gas engines.

Boating and marine activities are also major drivers of the small gas engines market. Small gas engines are commonly employed in various types of boats, including fishing boats, speedboats, and pontoons, to power propulsion systems and onboard accessories such as generators and pumps. As the interest in water-based recreational activities continues to grow, so does the demand for small gas engines in the marine sector.

Furthermore, off-road vehicles such as all-terrain vehicles (ATVs) and dirt bikes play an integral role in outdoor recreational pursuits. These vehicles rely on small gas engines for their performance and maneuverability. The popularity of off-roading and outdoor adventure sports has led to a consistent demand for small gas engines in this segment.

Snowmobiling is yet another recreational activity that drives the small gas engines market, particularly in regions with snowy winters. Snowmobiles are equipped with small yet powerful engines that enable riders to navigate through snow-covered terrains. As winter tourism and snow sports gain popularity, the demand for snowmobiles and, consequently, small gas engines remains robust.

In conclusion, the expansion of recreational and leisure activities that require small gas-powered equipment serves as a significant driver for the global small gas engines market. The appeal of outdoor adventures, RV travel, boating, off-roading, and snowmobiling is expected to fuel sustained growth in this market segment.

Increasing Demand for Backup Power Generation

The rising demand for backup power generation solutions is a critical driver of the global small gas engines market. Small gas engines are commonly used in generators to provide backup power during grid failures, particularly in regions with unreliable or vulnerable power infrastructure.

One of the primary factors contributing to the growing need for backup power generation is the increasing frequency and severity of natural disasters, such as hurricanes, storms, wildfires, and earthquakes. These events can cause prolonged disruptions to power supply, making backup generators essential for households, businesses, and critical facilities like hospitals and data centers. Small gas engines are preferred due to their compact size, ease of maintenance, and quick response time when power is required.

Furthermore, the growing reliance on electronic devices and digital infrastructure has heightened the importance of uninterrupted power supply. Data centers, in particular, require reliable backup power solutions to ensure continuous operation of critical IT systems. Small gas generators are often used in conjunction with uninterruptible power supplies (UPS) to facilitate seamless power transitions during outages.

In remote areas with limited or no access to the electrical grid, small gas generators play a vital role in providing electricity for homes, farms, and small businesses. This is especially relevant in developing regions where infrastructure development is still underway.

The expansion of the e-commerce industry has also fueled the demand for backup power generation. Warehouses and distribution centers rely on reliable power to operate efficiently, and small gas generators offer a cost-effective solution to ensure uninterrupted order processing and delivery services.

Additionally, as more individuals work remotely and depend on home offices, the need for backup power solutions at the household level has increased. Small gas generators provide a practical way to keep essential appliances and devices running during power outages, ensuring productivity and comfort.

In conclusion, the growing demand for backup power generation solutions driven by natural disasters, digital infrastructure, remote areas, e-commerce, and remote work is a significant driver for the global small gas engines market. As the importance of reliable backup power continues to grow, so does the market for small gas engines used in generators and related applications.

Key Market Challenges

Environmental Concerns and Emissions Regulations

One of the primary challenges confronting the global small gas engines market is the growing environmental awareness and stricter emissions regulations. Small gas engines, typically fueled by gasoline or diesel, emit greenhouse gases and other pollutants that contribute to air pollution and climate change. Governments worldwide are actively combating these issues by imposing increasingly stringent emissions standards on various equipment, including small gas engines.

Compliance with these emissions regulations presents a significant challenge for manufacturers in the small gas engine industry. It entails the complex engineering task of developing engines that are both powerful and efficient while reducing harmful emissions. Achieving compliance often requires substantial investments in research and development to innovate cleaner combustion technologies, exhaust aftertreatment systems, and alternative fuel options.

Moreover, meeting emissions standards can lead to higher production costs for small gas engines, potentially resulting in increased prices for consumers. Manufacturers must carefully balance environmental responsibility with market competitiveness. This challenge is further compounded as emissions standards evolve and become more demanding over time, necessitating ongoing innovation and adaptation.

In addition, navigating the intricate network of international emissions regulations poses a logistical challenge for manufacturers operating in the global market. Different regions and countries have their own emissions standards and testing procedures, requiring compliance on multiple fronts. This can result in heightened administrative and regulatory burdens, as well as potential delays in product launches.

Competition from Electric Power Solutions

The global market for small gas engines is facing fierce competition from electric power solutions, particularly in applications where environmental concerns and energy efficiency take precedence. Electric engines, powered by batteries, have gained significant traction in various sectors, including lawn and garden equipment, bicycles, and small vehicles.

Electric power solutions offer numerous advantages, such as reduced emissions, quieter operation, and lower operating costs. They are particularly attractive in residential settings, where concerns about noise pollution and air quality are significant. Electric lawnmowers, for instance, have witnessed a surge in popularity due to their quieter operation and zero emissions.

This shift towards electric alternatives presents a challenge for traditional small gas engine manufacturers. They must adapt their product offerings to remain competitive in a market where customers are increasingly environmentally conscious. This may involve the development of hybrid or dual-fuel options that combine the benefits of small gas engines with reduced emissions and improved efficiency.

Furthermore, the infrastructure for electric charging and battery technology is advancing rapidly, further enhancing the appeal of electric solutions. As electric power systems become more accessible and affordable, the small gas engines market may face even greater competition, particularly in urban and suburban areas.

Supply Chain Disruptions and Material Shortages

The global market for small gas engines is confronted with challenges related to disruptions in the supply chain and shortages of materials. These challenges have been further amplified by events such as the COVID-19 pandemic and geopolitical tensions. Small gas engines rely on a complex supply chain that encompasses components, raw materials, and manufacturing processes from various regions worldwide.

The pandemic has underscored the vulnerability of global supply chains, with production and logistics being disrupted due to lockdowns, travel restrictions, and workforce shortages. Many manufacturers of small gas engines have encountered delays in obtaining essential components, leading to production bottlenecks and increased lead times. The industry continues to face challenges in terms of the availability of critical materials and components.

Geopolitical tensions and trade disputes can also impact the small gas engines market by impeding the flow of materials and components across borders. Tariffs and trade barriers can result in increased costs for manufacturers, affecting pricing and market competitiveness.

Moreover, shortages of vital materials such as semiconductors and rare earth metals can disrupt the production of small gas engines, as these components are integral to engine control systems and other critical applications. Such shortages can arise from factors beyond the control of the industry, such as heightened demand for electronic devices or geopolitical trade restrictions.

To alleviate these challenges, manufacturers in the small gas engines market must

diversify their supply chains, establish contingency plans, and invest in robust inventory management systems. It is also crucial for them to closely monitor geopolitical developments and foster collaborative relationships with suppliers to ensure a steady flow of materials and components.

Key Market Trends

Adoption of Alternative Fuels for Small Gas Engines

A notable trend observed in the global market for small gas engines is the increasing adoption of alternative fuels as a cost-effective and environmentally friendly solution. Traditionally, small gas engines have heavily relied on gasoline or diesel fuels, which contribute to emissions and environmental pollution. However, in response to a growing concern for the environment and stricter emissions regulations, manufacturers and consumers are now exploring alternative fuel options.

One prominent alternative fuel gaining significant traction is propane. Propane-powered small gas engines offer several advantages, including lower emissions, reduced fuel costs, and longer engine life due to cleaner combustion. Propane is considered a cleaner-burning fuel compared to gasoline or diesel and is readily available in many regions. Consequently, propane-powered small gas engines are finding applications in various fields such as lawn mowers, generators, and forklifts.

Another emerging trend is the utilization of natural gas as an alternative fuel for small gas engines. Natural gas is abundant and often more cost-effective than traditional gasoline or diesel fuels. It emits fewer greenhouse gases and particulate matter, making it an appealing option for environmentally conscious consumers and industries. Small gas engines powered by natural gas are being employed in diverse applications, including power generation, irrigation pumps, and commercial vehicles.

Moreover, the development of biofuels, such as ethanol and biodiesel, presents opportunities for reducing the environmental impact of small gas engines. These biofuels are derived from renewable sources like corn or soybeans and can be blended with conventional fuels to decrease emissions. Small gas engines designed to run on biofuels are becoming increasingly prevalent, particularly in agriculture and forestry applications.

Overall, the inclination towards alternative fuels in the small gas engines market signifies a growing emphasis on sustainability and environmental responsibility.

Manufacturers are expected to continue investing in research and development to optimize engine performance and compatibility with these alternative fuels, while consumers and businesses seek more eco-friendly options for their equipment.

Smart Technology Integration in Small Gas Engines

Another significant trend in the global small gas engines market is the integration of smart technology and digital solutions into engine design and operation. This trend is driven by the pursuit of greater efficiency, improved performance monitoring, and an enhanced user experience.

One aspect of this trend is the development of electronic fuel injection (EFI) systems in small gas engines. EFI systems replace traditional carburetors with electronic controls, resulting in more precise fuel delivery and optimized combustion. EFI-equipped engines offer advantages such as improved fuel efficiency, reduced emissions, and enhanced starting reliability, even in extreme weather conditions. These systems also enable real-time engine diagnostics and performance monitoring.

Furthermore, the incorporation of sensors and connectivity features into small gas engines is becoming increasingly prevalent. These sensors can provide data on engine temperature, oil pressure, fuel level, and other critical parameters. Integrated connectivity allows users to remotely monitor and control their equipment via smartphone apps or web-based platforms, enabling features like remote start, shutdown, and maintenance alerts.

In the commercial and industrial sectors, the trend towards telematics and fleet management solutions is growing. Small gas engines in equipment such as generators, construction machinery, and utility vehicles are being outfitted with telematics systems that provide real-time location tracking, fuel consumption data, and predictive maintenance insights. These systems help businesses optimize their fleets, reduce downtime, and improve overall operational efficiency.

Overall, the integration of smart technology into small gas engines aligns with the broader industry shift towards Industry 4.0 and the Internet of Things (IoT). As digital solutions continue to advance, small gas engine manufacturers are likely to explore new avenues to enhance performance, reliability, and user convenience through connectivity and data-driven insights.

Segmental Insights

Engine Displacement Insights

The 101-450cc segment holds a significant market share in the Global Small Gas Engines Market. This growth is primarily driven by the increasing demand for power equipment across various sectors, including landscaping, agriculture, construction, and power generation.

Small gas engines within this range play a crucial role in various agricultural equipment such as tillers, irrigation pumps, and small tractors. With the expanding global population, there is an ongoing requirement for efficient and productive farming practices, which fuels the demand for these engines. The construction industry heavily relies on small gas engines in this segment for tasks like concrete cutting, compacting, and powering small machinery. The growth of the construction sector significantly contributes to the demand for engines in this category.

Gradually, small gas engines in the 101-450cc segment are integrating smart technology, including electronic fuel injection (EFI) systems and sensors for real-time monitoring and diagnostics. These advancements enhance efficiency and improve the user experience. There is a notable opportunity for aftermarket retrofitting and engine upgrades, particularly for generators and construction equipment, to enhance performance, efficiency, and compliance with emissions regulations.

In conclusion, the 101-450cc segment of the global small gas engines market is characterized by its versatility and extensive range of applications.

Application Insights

The Gardening segment holds a significant market share in the Global Small Gas Engines Market. A significant portion of gardening equipment sales in this segment is attributed to replacements and upgrades, as consumers seek more efficient and advanced tools to maintain their outdoor spaces effectively.

String trimmers, also referred to as weed eaters or weed whackers, utilize small gas engines to trim grass and weeds in hard-to-reach areas where lawnmowers are not suitable. Gas-powered chainsaws are primarily used for tree cutting, branch pruning, and firewood processing, offering the necessary power and mobility for demanding tasks.

Some gardening equipment within this segment incorporates smart technology, including electronic fuel injection (EFI), sensors, and connectivity for real-time monitoring and user convenience.

Collaborating with garden supply retailers and home improvement stores can broaden market reach and provide direct consumer access. Offering aftermarket accessories and parts for maintenance and enhancements can create additional revenue streams.

In conclusion, the gardening segment in the global small gas engines market is characterized by seasonality, a wide range of powered equipment, and an increasing focus on emissions compliance and technology integration.

Regional Insights

The North America region is expected to dominate the market during the forecast period due to its substantial size. The region benefits from a well-established small gas engines industry with renowned manufacturers and a wide range of applications. These applications encompass lawn and garden equipment, power generators, construction machinery, recreational vehicles, and marine equipment.

The North American market for small gas engines has demonstrated consistent growth over time. This growth can be attributed to several factors, including a robust construction industry, the popularity of outdoor power equipment, and a significant demand for backup power solutions. Environmental consciousness represents a significant trend that drives the North American small gas engines market. Stricter emissions regulations and a growing preference for eco-friendly alternatives have stimulated manufacturers to develop cleaner and more fuel-efficient small gas engines.

The region is witnessing an increasing adoption of alternative fuels such as propane, natural gas, and biofuels. These fuels are considered to be more sustainable and cost-effective, aligning with the region's commitment to emissions reduction and promotion of renewable energy sources.

The growing interest in landscaping, lawn care, and outdoor activities in North America presents an opportunity for manufacturers to meet the demand for small gas engines in equipment such as lawnmowers, leaf blowers, and snow blowers.

Key Market Players

Briggs & Stratton Corporation

Kohler Co.

Mitsubishi Heavy Industries, Ltd.

Honda Motor Co., Ltd

Fuji Heavy Industries

Kubota corporation

Generac Power Systems

Yamaha Motor Corp.

Kawasaki Heavy Industries

Kubota Corporation

Report Scope:

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

Global Small Gas Engines Market, By Engine Displacement:

20-100cc

101-450cc

451-650cc

Global Small Gas Engines Market, By Application:

Gardening

Industrial

Construction

Others

Global Small Gas Engines Market, By Equipment:

Lawnmower

Chainsaw

Portable Generator

Pressure Washer

Others

Global Small Gas Engines 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

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

Available Customizations:

Global Small Gas Engines Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

Company Information

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

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14. STRATEGIC RECOMMENDATIONS

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