

# **Middle East & Africa Gas Engine Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Fuel Type (Natural Gas and Special Gas), Power Output (100-300 kW, 300-500 kW, 0.5-1 MW, 1-2 MW, 2-5 MW, 5-10 MW, and 10-15MW), and End-User [Remote (Mining, Drilling, Others), Mid-Stream Oil and Gas, Heavy Industries (Chemicals, Paper, Metals, Food and Beverages, Others), Light Manufacturing, Utilities (Grid, IPP, Others), Biogas, Datacenters, MUSH, and Commercial]**

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## **Abstracts**

The gas engine market in the Middle East and Africa (MEA) is poised for significant growth, with projections indicating that the market size will reach approximately USD 647.67 million by 2031, up from USD 468.68 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 4.8% from 2025 to 2031.

## **Executive Summary and Market Analysis**

The MEA region is on the cusp of rapid industrialization and the adoption of new technologies, which is expected to enhance various sectors. While Gulf countries are economically advanced, many African nations are still striving to improve their infrastructure to match the economic conditions of their Gulf counterparts. The Gulf states are increasingly embracing advanced engine technologies, driven by a growing population, rising middle-class incomes, and initiatives to diversify economies beyond

oil and gas. These factors are anticipated to create substantial opportunities for market players in the region.

Economic improvements are likely to boost natural gas consumption for engine applications. Although the current demand for gas engines in the region is relatively low, it is expected to rise significantly due to increased investments in gas engines for power generation in the coming years. According to the International Energy Agency (IEA), oil and gas producers in the Middle East and North Africa (MENA) have historically played a crucial role in the global energy market, accounting for about 50% of global oil exports and 15% of natural gas exports. As global energy markets face tightening supplies, particularly due to geopolitical tensions, MENA producers are expected to be pivotal in alleviating potential global energy shortages.

In MENA, oil and gas dominate the energy mix, comprising approximately 95% of electricity generation. Thermal power plants in the region consume over 290 billion cubic meters of gas, which represents more than one-third of the region's gas production, alongside a daily consumption of 1.75 million barrels of oil. This heavy reliance on fossil fuels results in an emissions intensity that is about 25% higher than the global average. Therefore, the growth of the gas engine market in MENA is critical. As the demand for flexible, reliable, and dispatchable power generation increases, especially in light of fluctuating energy supplies, advanced gas engines are becoming increasingly important. These engines can provide rapid response times and efficient energy output, aligning with the evolving needs of the region's power sector while also supporting efforts to reduce emissions as part of a broader energy transition.

### **Strategic Insights** and Market Segmentation

The gas engine market in the MEA can be segmented based on fuel type, power output, and end-user applications:

**Fuel Type:** The market is divided into natural gas and special gas, with natural gas holding a larger market share in 2024.

**Power Output:** The market is categorized into several segments, including 100-300 KW, 300-500 KW, 0.5-1 MW, 1-2 MW, 2-5 MW, 5-10 MW, and 10-15 MW. The 5-10 MW segment is expected to dominate the market in 2024.

**End User:** The market is segmented into various applications, including remote, mid-stream oil and gas, heavy industries, light manufacturing, utilities, biogas,

data centers, and commercial sectors. The heavy industries segment is projected to hold the largest share in 2024.

## Market Outlook

Governments in the region are increasingly implementing regulations to control emissions from diesel and petrol engines, prompting manufacturers to explore alternative fuel solutions such as natural gas. Gas engines are favored for their lower emissions while still generating substantial power. Regulatory bodies are enforcing stringent standards on diesel engines and generators, leading various industries to adopt gas engines to comply with these regulations.

Recent developments in the region highlight the shift towards more efficient gas engines. For instance, the Hamriyah Independent Power Plant in the UAE commenced operations with GE's 9HA.01 turbines, marking it as the most efficient gas-fired power plant in the region. Additionally, Mitsubishi Power has deployed hydrogen-ready gas turbines for projects in Saudi Arabia, Bahrain, and Morocco, facilitating a future transition to 100% hydrogen fuel. In Qatar, GE's upgrades to a major power station in 2022 resulted in a significant reduction of CO<sub>2</sub> emissions by 67,000 tonnes annually. Furthermore, Wartsila expanded the Borg El Arab plant in Egypt by adding two 34SG gas engines, increasing its capacity by 19 MW. Such advancements in efficient fuel engines, driven by regulatory pressures, are propelling market growth.

## Country Insights

The MEA gas engine market includes key countries such as Saudi Arabia, South Africa, the UAE, and other regions within the MEA. Saudi Arabia is expected to hold the largest market share in 2024, driven by its abundant fossil fuel resources. The country is increasingly adopting high-power output engines due to the low cost of fuels, while also addressing air pollution concerns by shifting towards gas engines that offer lower emissions. The demand for gas engines is rising across various sectors, including oil and gas and remote applications. The IEA forecasts a 4% increase in Saudi Arabia's natural gas production by 2025, spurred by major projects like Jafurah Phase 1 and Tanajib, as the country aims to meet its Vision 2030 objectives.

## Company Profiles

Key players in the MEA gas engine market include Rolls-Royce Holdings Plc, Ningbo

C.S.I. Power & Machinery Group Co., Ltd, Guascor Energy S.A.U, IHI Corp, MAN Energy Solutions SE, 2G ENERGY AG, Wärtsilä Corp, R Schmitt Enertec GmbH, Mitsubishi Heavy Industries Ltd, Liebherr, Kawasaki Heavy Industries Ltd, Fairbanks Morse, LLC, Cummins Inc, Caterpillar Inc, and INNIO Jenbacher GmbH & Co. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to consumers.

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