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Global Non Automotive Small Diesel Engines: Detailed Inputs on Market Insights, Opportunities and Challenges

Description: Globally non automotive small diesel engine market (<100 HP) is very complex and heterogeneous market which encompasses end application segments of construction, agriculture, industrial, marine and auxiliary power segments. Emerging economies are likely to contribute to around 70 percent of the global economy by 2025 displaying the inherent potential which the regions hold. Investment friendly initiatives and policies endorsed by governments, which are aimed to improve infrastructure, will aid the construction industry while modernisation of agriculture practices in developing economies will improve demand for agricultural equipment. Shortage of electricity in few regions will sustain the use of auxiliary power equipment till the near future. So in nut shell diesel engines shall continue to be main power horse driving various equipment's, although it may see increasing challenges from electricity and batteries.

This report discusses the global non automotive small diesel engine market in the year 2011 along with forecasts till 2016. Topics covered in the report include World diesel engine production; Production in Asia, EMEA (Europe, Middle East and Africa), North America and South America; World diesel engine market including sales by geography, power output, end user segment; World diesel engine market in emerging economies of Asia, Africa and South America; Competitor analysis; SWOT Analysis and recommendations to engine manufacturers. All this for <100 hp segment

The information contained in the report has been obtained by performing extensive research (more than 500+ interactions) over the past two years by interviewing industry experts, examining export and import data of various countries and other relevant information, meanwhile constantly updating our databases. It has been captured and structured in a manner which is unique and different from any existing reports or publicly available information. Lack of market intelligence on non automotive engines market is the primary reason for Knowledgefaber to focus on this segment.

The report will be useful to diesel engine manufacturers (non automotive/automotive) industry by making them understand the current scenario of the market in terms of key end user segments, attractive geographies and competitor know-how. The report will help manufacturers to:

It will be immensely beneficial for both new and entrenched players in the following ways:

a) Benchmarking and performance monitoring: Market size numbers in the report have been collected through exhaustive primary and secondary research and can serve as benchmark to assess the sales performance and devise business plans for both new and entrenched players.

b) Devising market-entry strategy: Knowledgefaber report provides detailed information about end application segments of construction, agri, industrial, auxiliary and other equipment industry landscape and can serve as an input for devising effective market entry strategy for any new player

c) Planning business expansion and diversification: Knowledgefaber report provides a clear indication of the attractiveness of various product lines and technologies and can serve as an input for identification of diversification opportunities.

d) Supply chain optimization: Non Asian manufacturers can really gain insights from this report to localize production chain in these geographies and can benefit from enhanced Value play.

Key Findings of the Research

Global Production of diesel engines

Asia was the largest contributor to the world diesel engine production in 2011. Its share of world production stood at approx. 76% with leading countries being China, Japan and India. Europe and North America were other regions with a significant global share of production.

Both China and India recorded momentous growth in the last five years. Along with them, nations in

Southeast Asia are also experiencing swift growth in production. This is expected to create a wider margin between Asia and other regions in terms of global production of diesel engines.

Global Diesel engine market

Asia again comes out on the top as a very lucrative market for non automotive diesel engines. Increase in the demand for both the construction and agricultural machinery in Asia has fuelled the need for diesel engines here. Europe was the next largest market after Asia.

Globally, construction equipment was the largest end user segment. The need for infrastructure development in emerging economies has seen a substantial increase in construction activity which has fuelled the demand for construction equipment. The market for agricultural machinery has also seen a spurt in demand due to modernisation in agricultural practices in developing economies in Asia like India, Indonesia, and Thailand etc.

Competitor Analysis

In this report KF has done a detailed competitive analysis at global levels. Chinese and Japanese manufacturers have emerged as global leaders. Although Few Indian companies are noticeable in domestic front but on global level there is lack of credible Indian companies but this might change in future.

Kubota and Yanmar, headquartered in Japan, are the among the largest players in the less than 100 HP non automotive diesel engine market in the world. Both the players also manufacture construction, agricultural and auxiliary power machinery which has seen them achieve notable expertise in engine design and integration. These two manufacturers also focuses on R&D and new product variants and each has more than 100+ diesel engine variants

In China, Changfa and Changchai group are the domestic leaders in the diesel engine industry. Besides these two players, China boast of several large to mid size players and is easily the worlds production powerhouse of small diesel engines. However companies operating in china have also to contend with specific concern and issues as highlighted in report

Non Asian Manufacturers are also actively pursuing their interests in Asia by setting up their manufacturing operations here or by entering into joint ventures with local players to improve their market share in the region.

Contents:

- - Power Output
- - End User Segment
- Projections of market size by Value and Volume – 2011 to 2016

7. Competitive analysis of key global players in the small diesel engine market
- Competitive Landscape and market shares
- Detailed Competitor Profiles (Top 7-8 global manufacturers)

8. Emerging Economies – A SWOT Analysis

9. Recommendations for Engine Manufacturers

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