Global Diesel Generator Market Reached $XX Billion in 2013

The global diesel generator set (genset) market was valued at over $XX billion in 2013, increasing from $XX billion in 2006 at a Compound Annual Growth Rate (CAGR) of XX%. In the forecast period, the market is expected to continue to grow at a steady pace. The US, China and India are some of the major markets, and cumulatively account for more than half of the global diesel genset market. In the future, it is expected that China and India’s share will increase, while the US share is expected to decline, with China replacing it to gain the leading market position.

The diesel genset market faces stiff competition from gas gensets, which are being adopted by countries due to their low carbon emissions. However, diesel gensets are expected to continue to be more popular, due to their increased usage by the residential sector.

Global Diesel Generator Market to be Driven by India and China

India and China each face a considerable gap between their power supply and demand, creating attractive markets for diesel generator set (genset) manufacturers. High power deficits coupled with strong economic growth potential are the two strongest drivers for the diesel genset market in both India and China.

The genset market showed impressive growth in India and China between 2006 and 2013. Together, these countries accounted for XX% of the global genset’s market revenues in 2013. By 2020, these two countries are expected to account for XX% of the market’s global revenue.
# Table of Contents

1. **Table of Contents** ............................................................................................................. 4
   1.1 List of Tables .................................................................................................................. 7
   1.2 List of Figures ............................................................................................................... 9

2. **Introduction** .................................................................................................................... 11
   2.1 Diesel Generator, Overview ......................................................................................... 11
       2.1.1 End-user Classification ....................................................................................... 11
       2.1.2 Capacity Level Classification .............................................................................. 11
       2.1.3 Technologies ........................................................................................................ 11
   2.2 GlobalData Report Guidance ....................................................................................... 12

3. **Global: Diesel Generator Market** .................................................................................. 13
   3.1 Overview ....................................................................................................................... 13
       3.1.1 Regional Segmentation of Diesel Generator Market, 2013 .................................... 14
       3.1.2 Global, Diesel Generator Market, Drivers ........................................................... 15
       3.1.3 Global, Diesel Generator Market, Restraints ......................................................... 17
   3.2 Global Diesel Generator Market ................................................................................... 19

4. **Diesel Generator Market, the US** .................................................................................. 22
   4.1 Overview ....................................................................................................................... 22
       4.1.1 Diesel Generator Market, US, Drivers and Restraints .......................................... 23
       4.1.2 Diesel Generator Market, US, Drivers ................................................................. 24
       4.1.3 Diesel Generator Market, US, Restraints ............................................................. 25
   4.2 Diesel Generator Market, US, Revenues ..................................................................... 26
       4.2.1 Diesel Generator Market, US, End-user Segmentation, 2013 ............................... 28
       4.2.2 Diesel Generator Market, US, Breakdown of Total Rental Revenue by Capacity Level 30
   4.3 Diesel Generator Market, US, Market Share of Major Diesel Generator Manufacturers, 2013 .................................................................................................................................................. 32

5. **Diesel Generator Market, China** .................................................................................... 34
Table of Contents

5.1 Overview .......................................................................................................................... 34
5.1.1 Diesel Generator Market, China, Drivers and Restraints ........................................... 35
5.1.2 Diesel Generator Market, China, Drivers .................................................................. 35
5.1.3 Diesel Generator Market, China, Restraints ............................................................... 37
5.2 Diesel Generator Market, China, Revenues ................................................................. 37
5.2.1 Diesel Generator Market, China, End-user Segmentation, 2013 ............................... 39
5.2.2 Diesel Generator Market, China, Breakdown of Total Revenue by Capacity Level ...... 40
5.3 Diesel Generator Market, China, Market Share of Major Diesel-Generator Manufacturers, 2013 .......................................................................................................................... 42

6 Diesel Generator Market, India .......................................................................................... 44
6.1 Overview .......................................................................................................................... 44
6.1.1 Diesel Generator Market, India, Drivers and Restraints ............................................. 45
6.1.2 India, Diesel Generator Market, Drivers .................................................................... 46
6.1.3 India, Diesel Generator Market, Restraints ............................................................... 47
6.2 Diesel Generator Market, India, Revenues ................................................................. 47
6.2.1 Diesel Generator Market, India, End-user Segmentation, 2013 ............................... 49
6.2.2 Diesel Generator Market, India, Breakdown of Total Rental Revenue by Capacity Level .............................................................................................................................. 50
6.3 Diesel Generator Market, India, Market Share of Major Diesel-Generator Manufacturers, 2013 .......................................................................................................................... 52

7 Diesel Generator Market, Nigeria ...................................................................................... 54
7.1 Overview .......................................................................................................................... 54
7.1.1 Diesel Generator Market, Nigeria, Drivers and Restraints ........................................ 55
7.1.2 Diesel Generator Market, Nigeria, Drivers ............................................................... 55
7.1.3 Diesel Generator Market, Nigeria, Restraints .......................................................... 56
7.2 Diesel Generator Market, Nigeria, Revenues ............................................................... 56
7.2.1 Diesel Generator Market, Nigeria, End-user Segmentation, 2013 .......................... 58
7.2.2 Diesel Generator Market, Nigeria, Total Rental Revenue by Capacity Level .......... 60
# Table of Contents

7.3 Diesel Generator Market, Nigeria, Market Share of Major Diesel Generator Manufacturers, 2013 ................................................................. 62

8 Diesel Generator Market, South Africa ............................................................................................................................ 64

8.1 Overview ........................................................................................................................................................................... 64

8.1.1 Diesel Generator Market, South Africa, Drivers and Restraints ................................................................. 65

8.1.2 Diesel Generator Market, South Africa, Drivers ....................................................................................... 66

8.1.3 Diesel Generator Market, South Africa, Restraints ..................................................................................... 67

8.2 Diesel Generator Market, South Africa, Revenues ................................................................................................... 68

8.2.1 Diesel Generator Market, South Africa, End-user Segmentation, 2013 ........................................................... 69

8.2.2 Diesel Generator Market, South Africa, Breakdown of Total Rental Revenue by Capacity Level ................................................. 70

8.3 Diesel Generator Market, South Africa, Market Share of Major Diesel Generator Manufacturers, 2013 ............................................................. 72

9 Diesel Generator Market, UK .................................................................................................................................. 74

9.1 Overview ........................................................................................................................................................................... 74

9.1.1 Diesel Generator Market, UK, Drivers and Restraints ................................................................................. 75

9.1.2 Diesel Generator Market, UK, Drivers ............................................................................................................. 76

9.1.3 Diesel Generator Market, UK, Restraints ................................................................................................. 76

9.2 Diesel Generator Market, UK, Revenues ................................................................................................................... 77

9.2.1 Diesel Generator Market, UK, End-user Segmentation, 2013 ................................................................. 79

9.2.2 Diesel Generator Market, UK, Breakdown of Total Revenue by Capacity Level ........................................ 80

9.3 Diesel Generator Market, UK, Market Share of Major Diesel Generator Manufacturers, 2013 ................................................................. 82

10 Appendix ................................................................................................................................................................. 84

10.1 Market Definitions ...................................................................................................................................................... 84

10.1.1 Power ................................................................................................................................................................. 84

10.1.2 Installed Capacity ............................................................................................................................................. 84

10.1.3 Electricity Generation ....................................................................................................................................... 84

10.1.4 Thermal Power Plant ........................................................................................................................................ 84
Table of Contents

10.1.5 Nuclear Power ............................................................................................................... 84
10.1.6 Renewable Energy Resources ...................................................................................... 84
10.2 Abbreviations .................................................................................................................... 85
10.3 Bibliography ...................................................................................................................... 86
10.4 Methodology ..................................................................................................................... 88
10.4.1 Coverage ...................................................................................................................... 88
10.4.2 Secondary Research ..................................................................................................... 88
10.4.3 Primary Research ......................................................................................................... 89
10.5 Disclaimer ......................................................................................................................... 89

1.1 List of Tables

Table 1: Global Diesel Generator Market, Regional Segmentation (%), 2013 ............................................. 14
Table 2: Diesel Generator Market, Global, Revenue Forecast ($bn), 2006–2020 ......................................... 21
Table 3: Diesel Generator Market, US, Revenue Forecast ($bn), 2006–2020 .............................................. 28
Table 4: Diesel Generator Market, US, End-user Segmentation (%), 2013 .............................................. 29
Table 5: Diesel Generator Market, US, Low and High-capacity Revenue Forecast ($bn), 2006–2020 ....... 32
Table 6: Diesel Generator Market, US, Market Share of Major Diesel Generator Manufacturers (%), 2013 33
Table 7: Diesel Generator Market, China, Revenue Forecast ($bn), 2006–2020 ........................................ 39
Table 8: Diesel Generator Market, China, End-user Segmentation (%), 2013 ........................................ 40
Table 9: Diesel Generator Market, China, Low, Medium and High-capacity Revenue Forecast ($m), 2006– 2020 ............................................................................................................................. 42
Table 10: Diesel Generator Market, China, Market Share of Major Diesel Generator Manufacturers (%), 2013 ................................................................................................................................. 43
Table 11: Diesel Generator Market, India, Revenue Forecast ($bn), 2006–2020 ....................................... 49
Table 12: Diesel Generator Market, India, End-user Segmentation (%), 2013 ....................................... 50
Table of Contents

Table 13: Diesel Generator Market, India, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 ................................................................. 52
Table 14: Diesel Generator Market, India, Competitive Landscape (%), 2013 ................................................................. 53
Table 15: Diesel Generator Market, Nigeria, Revenue Forecast ($m), 2006–2020 ................................................................. 58
Table 16: Diesel Generator Market, Nigeria, End-user Segmentation (%), 2013 ................................................................. 59
Table 17: Diesel Generator Market, Nigeria, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 ................................................................. 62
Table 18: Diesel Generator Market, Nigeria, Market Share of Major Diesel Generator Manufacturers (%), 2013 ................................................................. 63
Table 19: Diesel Generator Market, South Africa, Revenue Forecast ($m), 2006–2020 ................................................................. 69
Table 20: Diesel Generator Market, South Africa, End-user Segmentation, 2013 ................................................................. 70
Table 21: Diesel Generator Market, South Africa, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 ................................................................. 72
Table 22: Diesel Generator Market, South Africa, Market Share of Major Diesel Generator Manufacturers (%), 2013 ................................................................. 73
Table 23: Diesel Generator Market, UK, Revenue Forecast ($m), 2006–2020 ................................................................. 79
Table 24: Diesel Generator Market, UK, End-user segmentation (%), 2013 ................................................................. 80
Table 25: Diesel Generator Market, UK, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 ................................................................. 82
Table 26: Diesel Generator Market, UK, Competitive Landscape (%), 2013 ................................................................. 83
Table 27: Abbreviations ................................................................. 85
Table of Contents

1.2 List of Figures

Figure 1: Diesel Generator Market, Regional Segmentation (%), 2013 ................................................................. 14
Figure 2: Diesel Generator Market, Global, Drivers, 2014................................................................................. 15
Figure 3: Diesel Generator Market, Global, Restraints, 2014 ............................................................................. 17
Figure 4: Diesel Generator Market, Global, Revenue Forecast ($bn), 2006–2020 ............................................. 20
Figure 5: Diesel Generator Market, the US, Drivers and Restraints, 2014 ......................................................... 23
Figure 6: Diesel Generator Market, US, Revenue Forecast ($bn), 2006–2020 ..................................................... 27
Figure 7: Diesel Generator Market, US, End-user Segmentation (%), 2013 ......................................................... 29
Figure 8: Diesel Generator Market, US, Low and High-capacity Revenue Forecast ($bn), 2006–2020 ....... 31
Figure 9: Diesel Generator Market, US, Market Share of Major Diesel Generator Manufacturers (%), 2013 33
Figure 10: Diesel Generator Market, China, Drivers and Restraints, 2014 ............................................................. 35
Figure 11: Diesel Generator Market, China, Revenue Forecast ($bn), 2006–2020 ........................................... 38
Figure 12: Diesel Generator Market, China, End-user Segmentation (%), 2013 ..................................................... 40
Figure 13: Diesel Generator Market, China, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 .............................................................. 41
Figure 14: Diesel Generator Market, China, Market Share of Major Diesel Generator Manufacturers (%), 2013 43
Figure 15: Diesel Generator Market, India, Drivers and Restraints, 2014 ............................................................. 45
Figure 16: Diesel Generator Market, India, Revenue Forecast ($bn), 2006–2020 ........................................... 48
Figure 17: Diesel Generator Market, India, End-user Segmentation (%), 2013 ..................................................... 50
Figure 18: Diesel Generator Market, India, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 .............................................................. 51
Figure 19: Diesel Generator Market, India, Competitive Landscape (%), 2013............................................................. 53
Figure 20: Diesel Generator Market, Nigeria, Drivers and Restraints, 2014 ............................................................. 55
Figure 21: Diesel Generator Market, Nigeria, Revenue Forecast ($m), 2006–2020 ........................................... 57
### Table of Contents

- Figure 22: Diesel Generator Market, Nigeria, End-user Segmentation (%), 2013 ........................................... 59
- Figure 23: Diesel Generator Market, Nigeria, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 .................................................................................................................. 61
- Figure 24: Diesel Generator Market, Nigeria, Market Share of Major Diesel Generator Manufacturers (%), 2013 .......................................................................................................................... 63
- Figure 25: Diesel Generator Market, South Africa, Drivers and Restraints, 2013 ........................................ 65
- Figure 26: Diesel Generator Market, South Africa, Revenue Forecast ($m), 2006–2020 .................................. 68
- Figure 27: Diesel Generator Market, South Africa, End-user Segmentation (%), 2013 .............................. 70
- Figure 28: Diesel Generator Market, South Africa, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 .................................................................................................................. 71
- Figure 29: Diesel Generator Market, South Africa, Market Share of Major Diesel Generator Manufacturers (%), 2013 .......................................................................................................................... 73
- Figure 30: Diesel Generator Market, UK, Drivers and Restraints, 2014 ...................................................... 75
- Figure 31: Diesel Generator Market, UK, Revenue Forecast ($m), 2006–2020 ............................................ 78
- Figure 32: Diesel Generator Market, UK, End-user Segmentation (%), 2013 .......................... 80
- Figure 33: Diesel Generator Market, UK, Low, Medium and High-capacity Revenue Forecast ($m), 2006–2020 .................................................................................................................. 81
- Figure 34: Diesel Generator Market, UK, Competitive Landscape (%), 2013 ............................................ 83
2 Introduction

2.1 Diesel Generator, Overview

The generator set (genset) converts mechanical energy into electrical energy, with output being in the form of Alternating Current (AC). A genset is the combination of a fossil-fuel-powered engine mounted together with an electrical generator.

Diesel generators use diesel as a fuel to power the engine. They are the most commonly used gensets. Though diesel is costlier compared to gas, it has a higher energy density and more energy can be extracted from the same amount of fuel. Compared to gas and other fuels, diesel is less flammable, meaning it is safer to store and handle. Moreover, diesel generators require less maintenance and are more reliable, and the initialization of diesel gensets is more economical compared to gas gensets. Easy on-site fuel availability due to ease of transportation and storage of diesel, has also made diesel gensets more popular compared to gas gensets.

2.1.1 End-user Classification

Demand from all end-users such as industrial, residential and commercial sectors is covered in analysis, according to availability of data.

2.1.2 Capacity Level Classification

Capacity level classifications of diesel genset revenue have been provided according to the power ratings for a select set of countries. This classification is based on the data provided by key primary correspondents and varies from country to country.

2.1.3 Technologies

The report covers gensets powered by diesel.

These include all back-up and prime power generators of all power ratings. In the report, the market has been segmented under the below mentioned power rating brackets:

- Less than XX kilovolt Ampere (kVA): Small gensets
- XX kVA – XX kVA: Medium gensets
- Greater than XX kVA: large gensets
2.2 GlobalData Report Guidance

- The report begins with an executive summary capturing the current and future outlook of diesel genset market. The remaining chapters of the report are as follows:
  - Chapter two provides an introduction to diesel genset and their advantages compared to other forms of generation.
  - Chapter three introduces the global diesel genset market. This chapter covers global market revenues as well as regional market shares and revenues. The chapter also discusses the drivers and restraints faced by the genset market.
  - Chapters four to nine discuss the power genset markets in the overall market’s key countries: the US, China, India, Nigeria, South Africa and the UK. Analysis is provided for market revenues, including differentiation by power rating, and company market shares. Market drivers and restraints are also examined for each country.
3.1.1 Regional Segmentation of Diesel Generator Market, 2013

The Middle East and Africa has the highest share of the global diesel genset market, constituting XX% of market revenues. Europe and North America are the next-largest markets, with respective shares of XX% and XX%. Asia-Pacific and Latin America hold comparatively lower shares, with XX% and XX% respectively.

![Pie chart showing regional segmentation of diesel generator market, 2013](image)

Source: GlobalData, interviews with diesel generator industry experts in China, India, US, UK, South Africa and Nigeria

<table>
<thead>
<tr>
<th>Region</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia-Pacific</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td></td>
</tr>
<tr>
<td>Middle East and Africa</td>
<td></td>
</tr>
<tr>
<td>Europe</td>
<td></td>
</tr>
<tr>
<td>Latin America</td>
<td></td>
</tr>
</tbody>
</table>

Source: GlobalData, interviews with diesel generator industry experts in China, India, the US, the UK, South Africa and Nigeria
3.2 Global Diesel Generator Market

Globally, the diesel generator market increased from $XX billion in 2006 to $XX billion in 2013, at a Compound Annual Growth Rate (CAGR) of XX%. Revenues declined in 2008 and 2009, primarily due to the global economic slowdown, which adversely affected most countries worldwide. The market recovered in 2011, after which it has continued to grow at a steady pace. In 2013, the US share of the global diesel genset market was the highest of any national market, and accounted for approximately XX% of the market. The US diesel genset market is expected to continue to grow in the future, due to the growth of data centers and the healthcare sector, and stable demand from the commercial sector. China and India are the other two important countries considered in GlobalData’s study, and accounted for a combined share of around XX% of the global market in 2013. The economic growth of both China and India is expected to drive the demand for diesel gensets in these countries, where power consumption is expected to grow with the increased use of electronic appliances in the commercial and residential sectors. Although China faces an infrastructural bottleneck, of inadequate roads, power, and port facilities and also finds the export of these products difficult, its diesel genset revenue is expected to grow rapidly in the future. This is because the Chinese government is investing heavily in developing its national infrastructural network, including power.

In the 2014–2020 forecast period, the global diesel genset market is expected to increase from $XX billion to $XX billion, at a CAGR of XX%. The US is expected to decrease its market share from XX% to XX% due to its binding emission reduction targets. China is expected to dominate the market, with its market share increasing from XX% in 2013 to around XX% in 2020, while India’s share will grow from XX% to XX% during the same period.
Global: Diesel Generator Market

Figure 4: Diesel Generator Market, Global, Revenue Forecast ($bn), 2006–2020

Source: GlobalData, interviews with diesel generator industry experts in China, India, US, UK, South Africa and Nigeria
## Table 2: Diesel Generator Market, Global, Revenue Forecast ($bn), 2006–2020

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenues ($bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td></td>
</tr>
</tbody>
</table>

Source: GlobalData, interviews with diesel generator industry experts in China, India, the US, the UK, South Africa and Nigeria
10 Appendix

10.1 Market Definitions

10.1.1 Power
This refers to the rate of production, transfer, or energy use, usually related to electricity. Measured in watts and often expressed in kilowatts (kW) or Megawatts (MW), it is also known as ‘real’ or ‘active’ power.

10.1.2 Installed Capacity
Installed capacity refers to the generator’s nameplate capacity as stated by the manufacturer or the maximum rated output of a generator under given conditions. Installed capacity is given in MW on a nameplate physically fixed on the generator.

10.1.3 Electricity Generation
This term refers to the production of electric energy by transforming other forms of energy. It also refers to the amount of electric energy produced, expressed in Gigawatt-hours (GWh).

10.1.4 Thermal Power Plant
This refers to a plant in which turbine generators are driven by burning fossil fuels.

10.1.5 Nuclear Power
The electricity generated by the use of the thermal energy released from the fission of nuclear fuel in a reactor.

10.1.6 Renewable Energy Resources
Naturally replenishing energy resources limited in the amount of energy that is available per unit of time. For example, biomass, geothermal, solar, wind can all be termed as renewable resources.
## 10.2 Abbreviations

<table>
<thead>
<tr>
<th>Full form</th>
<th>Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternating Current</td>
<td>AC</td>
</tr>
<tr>
<td>Average Revenue Per User</td>
<td>ARPU</td>
</tr>
<tr>
<td>Compound Annual Growth Rate</td>
<td>CAGR</td>
</tr>
<tr>
<td>Complete Knock Down</td>
<td>CKD</td>
</tr>
<tr>
<td>Direct Current</td>
<td>DC</td>
</tr>
<tr>
<td>Department of Energy</td>
<td>DoE</td>
</tr>
<tr>
<td>Democratic Republic of Congo</td>
<td>DRC</td>
</tr>
<tr>
<td>Economic Community of West African States</td>
<td>ECOWAS</td>
</tr>
<tr>
<td>The US Environmental Protection Agency</td>
<td>EPA</td>
</tr>
<tr>
<td>Electric Power Sector Reform</td>
<td>EPSR</td>
</tr>
<tr>
<td>European Union</td>
<td>EU</td>
</tr>
<tr>
<td>Federal Energy Regulatory Commission</td>
<td>FERC</td>
</tr>
<tr>
<td>Five-Year Plan</td>
<td>FYP</td>
</tr>
<tr>
<td>Gross Domestic Product</td>
<td>GDP</td>
</tr>
<tr>
<td>Generator Set</td>
<td>genset</td>
</tr>
<tr>
<td>Gigawatt</td>
<td>GW</td>
</tr>
<tr>
<td>India Brand Equity Foundation</td>
<td>IBEF</td>
</tr>
<tr>
<td>Information Technology</td>
<td>IT</td>
</tr>
<tr>
<td>Information Technology-enabled Services</td>
<td>ITeS</td>
</tr>
<tr>
<td>Kirloskar Oil Engines Ltd.</td>
<td>KOEL</td>
</tr>
<tr>
<td>Kilovolt-amperes</td>
<td>kVA</td>
</tr>
<tr>
<td>Kilowatts</td>
<td>kW</td>
</tr>
<tr>
<td>Megawatts</td>
<td>MW</td>
</tr>
<tr>
<td>National Council for Applied Economic Research</td>
<td>NCAER</td>
</tr>
<tr>
<td>National Energy Administration</td>
<td>NEA</td>
</tr>
<tr>
<td>National Energy Regulator of South Africa</td>
<td>NERSA</td>
</tr>
<tr>
<td>Power Holding Company of Nigeria</td>
<td>PHCN</td>
</tr>
<tr>
<td>Particulate Matter</td>
<td>PM</td>
</tr>
<tr>
<td>Research and development</td>
<td>R&amp;D</td>
</tr>
<tr>
<td>Semi Knock Down</td>
<td>SKD</td>
</tr>
<tr>
<td>Transmission and Distribution</td>
<td>T&amp;D</td>
</tr>
</tbody>
</table>

Source: GlobalData
10.3 Bibliography


Appendix


Appendix

10.4 Methodology

GlobalData’s dedicated research and analysis teams consist of experienced professionals with a pedigree in marketing and market research, consulting backgrounds in the energy industry, and advanced levels of statistical expertise.

GlobalData adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Strategic and Competitive Intelligence Professionals (www.scip.org).

All GlobalData’s databases are continuously updated and revised. The following methodology has been followed for this report.

10.4.1 Coverage

The report provides detailed analysis of the diesel generator market for some of the key countries at the global level: the US, the UK, India, Brazil, China and Nigeria.

The report provides:

- Historical (2006–2012) and forecast data (2013–2020) on market revenues and the segmentation of market revenues by capacity level is given
- Diesel generator market drivers and restraints for these countries
- The market share of the key players in each country

10.4.2 Secondary Research

The research process begins with exhaustive secondary research on internal and external sources to source qualitative and quantitative information relating to each market.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and US Securities and Exchanges Commission (SEC) filings
- Industry trade journals and other literature
- Internal and external proprietary databases
- National government documents, statistical databases and market reports
- News articles, press releases and web-casts specific to the companies operating in the market
10.4.3 Primary Research

GlobalData conducts extensive primary interviews with industry participants and commentators in order to validate its data. A typical research interview fulfills the following functions:

- It provides first-hand information on the market size, market trends, growth trends, competitive landscape, and future outlook.
- Helps in validating and strengthening the secondary research findings.
- Further develops the team’s expertise and market understanding.
- Primary research involves e-mail interactions, telephonic interviews as well as face-to-face interviews for each market, category, segment and sub-segment across geographies.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, business development managers, market intelligence managers and national sales managers.
- Outside experts: Investment bankers, valuation experts, research analysts and key opinion leaders specializing in the alternative energy industry.

10.5 Disclaimer

All Rights Reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission of the publisher, GlobalData.

This report is a licensed product and should not to be reproduced without prior permission.