

South America Generator Sets Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The South America Generator Sets Market is expected to rise at a CAGR of more than 2.5% during the forecast period.

Key Highlights

Over the long term, factors such as lack of reliable grid infrastructure, the need for emergency backup power solutions, and increasing development operations in several remote and rural areas will likely drive the South American generator sets market. On the other hand, increasing the use of renewable energy for power supply and backup is expected to restrain the South America Generator Sets Market.

Nevertheless, diesel-based generator sets, due to their fuel efficiency and low maintenance cost than gas or other fuel-based generator sets and the emerging commercial and industrial sectors of Chile and Colombia, are likely to create several opportunities for the South America Generator Sets Market in the future.

Brazil dominates the geographical segment as the country has an increased demand for reliable power.

South America Generator Sets Market Trends

Diesel Segment Expected to Dominate the Market

A generator set, also known as Genset, is a portable equipment consisting of an engine and a generator used to provide energy. Gensets are usually used in developing areas and other areas not connected to the power grid, where power outages are frequent and where an outage can cause especially significant or dangerous problems, such as deep in a mine or hospital.

Diesel-based gensets use diesel to convert chemical energy to mechanical energy and then to electrical power. High-efficiency work output and maximum fuel energy density make it more cost-effective than the other fuel-based generator sets. Due to the above consideration, diesel generators are majorly used for its more cost-effectiveness.

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Moreover, diesel generator sets used nowadays are much-improved versions of the earlier model. They produce much less noise and need less maintenance cost than other gensets, thus driving the market during the forecast period.

Another application of the diesel generator is that it is used to top up the power grid during peak periods. It will work as a prime power generation source to ensure power availability, thus making it a reliable energy source.

The diesel-generator market's most significant driver is the region's data center plans, requiring a more reliable power supply. For instance, in April 2022, Arsat, Argentina's government-owned communications company, planned to build a new headquarters and backup data center in Bariloche, Patagonia. During the next four years, the company plans to invest USD 70 million in constructing its new headquarters in the PITBA (Bariloche Technological Industrial Productive Park). A backup data center will also be built at the Benavdez Earth Station on 12,000 square meters (129,100 square feet), along with a gateway for satellite links for expanding satellite broadband services.

Further, South America has an increasing demand for residential energy. According to the Empresa de Pesquisa Energetica (Brazil's Energy Research Office), in 2021, residential energy consumption increased from 124.91 terawatt-hours in 2013 to about 149.8 terawatt-hours. However, the region has poor power quality, which could drive the market for diesel generators.

In January 2022, Argentina's capital, Buenos Aires, witnessed a power outage that left 700,000 households without electricity amid a heat wave with temperatures above 40 degrees Celsius.

Hence, owing to the above points, diesel-based generator sets will likely dominate the South American generator sets market during the forecast period.

Brazil Expected to Dominate the Market

Due to the constant increase in energy demands and increasing industrial operations, Brazil is likely to be the largest market for generator sets in South America.

The country's oil and gas production sector is rapidly growing. The sites of oil and gas wells are usually at a remote place or offshore where onsite generator sets become necessary to provide the site either with a primary power supply or backup power for a smooth workflow. Thus the oil and gas sector is expected to become one of the many reasons to drive the generator sets market in the country.

In 2021, Biodiesel consumption increased by 5.2% to 101 thousand barrels of oil equivalent per day from 95 Thousand barrels of oil equivalent per day in 2020. The growth is attributed to the rise of clean energy fuels in Brazil, which is expected to rise in the future.

Brazil's Amazon forest lacks electricity from the interconnected national system. The 14% of the population in the remote location depends upon diesel generators as producing electricity is quite expensive in the region. Due to environmental, logistical, and economic issues, diesel generators in the Amazon of Brazil will persist in meeting electricity demand.

Hence, owing to the above points, Brazil is expected to dominate the South American generator sets market during the forecast period.

South America Generator Sets Market Competitor Analysis

The South America Generator Sets Market is moderately fragmented. Some of the key players in this market include (not in a particular order) Kohler Co., Caterpillar Inc., Cummins Inc., Atlas Copco AB, and Aggreko plc.

Additional Benefits:

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Table of Contents:

1 INTRODUCTION

- 1.1 Scope of the Study
- 1.2 Market Definition
- 1.3 Study Assumptions

2 EXECUTIVE SUMMARY

3 RESEARCH METHODOLOGY

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Size and Demand Forecast in USD billion, till 2027
- 4.3 Recent Trends and Developments
- 4.4 Government Policies and Regulations
- 4.5 Market Dynamics
 - 4.5.1 Drivers
 - 4.5.2 Restraints
- 4.6 Supply Chain Analysis
- 4.7 Porter's Five Force Analysis
 - 4.7.1 Bargaining Power of Suppliers
 - 4.7.2 Bargaining Power of Consumers
 - 4.7.3 Threat of New Entrants
 - 4.7.4 Threat of Substitutes Products and Services
 - 4.7.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 Fuel Type
 - 5.1.1 Diesel
 - 5.1.2 Natural Gas
 - 5.1.3 Others
- 5.2 End-User
 - 5.2.1 Residential
 - 5.2.2 Commercial
 - 5.2.3 Industrial
- 5.3 Geography
 - 5.3.1 Brazil
 - 5.3.2 Argentina
 - 5.3.3 Chile
 - 5.3.4 Rest of the South America

6 COMPETITIVE LANDSCAPE

- 6.1 Mergers, Acquisitions, Collaboration and Joint Ventures
- 6.2 Strategies Adopted by Key Players
- 6.3 Company Profiles
 - 6.3.1 PR INDUSTRIAL srl (PRAMAC)
 - 6.3.2 Aggreko plc

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- 6.3.3 Himoinsa (Yanmar Co., Ltd.)
- 6.3.4 Cummins Inc.
- 6.3.5 Caterpillar Inc.
- 6.3.6 Kohler Co.
- 6.3.7 Deere & Company
- 6.3.8 Atlas Copco AB
- 6.3.9 Generac Holdings Inc.
- 6.3.10 Briggs & Stratton Corporation

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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