

Africa Portable Generator Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The Africa Portable generator market is projected to register a CAGR of over 5.7% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently the market has now reached pre-pandemic levels.

Key Highlights

Power outages and off-grid applications to increase the demand for portable generators in the forecast period.

Geopolitical tensions and their impact on imports and prices are one of the major restraints for the market.

The development of hybrid renewable energy systems is expected to be a significant growth opportunity for the generator set market during the forecast period.

Nigeria region dominates the market and is also likely to witness the highest CAGR during the forecast period. Nigeria's one of the largest economies where businesses rely mainly on generators. According to the Central Bank of Nigeria (CBN), as of 2021, Nigerians spend an estimated USD 14 billion on generators and fuel yearly to prevent their businesses from crippling.

Africa Portable Generator Market Trends

Diesel Segment to have a Significant Share in the Market

Diesel generators use diesel as a fuel to power the engine. Diesel generators are the world's most important, reliable, and least expensive equipment for power generation. These generators can serve as a primary power source, a reliable secondary power

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source, and a backup or standby power source for residential, industrial, and commercial customers across the North West Europe diesel generator market. ?

Though diesel is costlier than gas, it has a higher energy density, and more energy can be extracted from the same fuel. Diesel is less flammable than gas and other fuels, making it safer to store and handle. Moreover, diesel generators are more reliable, and the initialization of diesel generator sets is more economical than gas generator sets. Due to the ease of transportation and storage of diesel, easy on-site fuel availability has also made diesel generator sets more popular than gas generator sets.?

Diesel generators are primarily used as a standby power source by consumers. When there is a lack of power, diesel generators can provide adequate backup power. To maintain continuous electricity supply, the diesel gen-sets can maintain a steady power supply and ensure smooth business operations. Diesel generators are beneficial in terms of availability of fuel, cost-effectiveness, and running, which makes them the most sought-after choice as the standby power source.?

Diesel generators are easy to operate and can supply electricity within seconds of startup. Diesel fuel is also readily available, which has boosted its adoption. The associated research and development work has led to enhanced efficiency of power production from diesel generators, which is a big boost for its usage.?

Governments in Ethiopia, Zambia, Madagascar, and Zimbabwe have planned for rural electrification through off-grid, including mini/micro-grid. Such steps are expected to reduce the dependency on generators in rural areas. However, the government is also planning for a hybrid solution by integrating solar with a gas generator, which is expected to create significant demand for gas generators.

The industrial sector, dominated by small- and medium-scale enterprises, relies heavily on gas generators due to frequent power outages. The industrial sector has witnessed double-digit growth in recent years. The same trend is expected to continue mainly due to increasing investment from China and improving ease of doing business in Rwanda. The change in the industrial sector will likely translate into massive demand for gas generators with a high-power rating, i.e., more than 375 kVA.

Sub-Saharan Africa's ability to access power was expected to decline in 2021. In the region, 597 million people did not have electricity that year, while 581 million Africans lacked electricity in 2020. This implies that roughly 5 out of 10 people lived in the darkness below the Sahara. Over 70% of the population lacked access to power in rural regions, making the situation worse. The most dramatic scene was observed in Central and West Africa, where fewer than 50% of the population was electrified.

Hence, increasing investment in diesel generators will drive the market during the forecast period due to the above points.

Nigeria fastest growing region in the Portable Generator market

The grid in Nigeria is not enough to serve the country's needs, and the massive population and economy are powered mainly by electricity from small-scale generators. The backup generators deployed in the country include diesel and smaller gasoline-powered generators. Although there are many large generators in Nigeria and other parts of Africa, the region is also well known for the widespread use of small gasoline generators. These inexpensive units have become newly available and emerged in recent years as a fast-growing segment.

The Nigeria Energy Master Plan, launched in 2011 by the Nigerian Government, aims to increase the share of renewable energy in the country to 10% by 2025. Thus, such initiatives will likely restrain the generator market in Nigeria during the forecast period. Similarly, the Nigerian Government has developed the National Renewable Energy and Energy Efficiency Policy, with the accompanying Vision 30:30:30 policy, which aims at achieving 30,000 MW of electricity by 2030, with renewable energy contributing 30% of the energy mix.?

In 2020, Lagos only got about 10% of its electricity needs, leaving its 20 million inhabitants to their own devices, thus increasing the demand for diesel generators. Despite being Nigeria's sprawling economic capital, it mainly works on diesel generators due to the poor power grid infrastructure.

In Benin City, Societe Beninoise d'Energie Electrique(SBEE), responsible for electricity distribution in the city due to its indebtedness and poor grid infrastructure, the people are fulfilling their electricity needs via generators.

Hence, government policies to promote energy efficiency will drive the market in Nigeria during the forecast period.

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Africa Portable Generator Market Competitor Analysis

The Africa Portable generator market is fragmented. Some of the key players in this market (in no particular order) includes Mitsubishi Heavy Industries, Ltd, Atlas Copco AB, Denyo Co., Ltd, Kirloskar Oil Engines Ltd, and Cummins Inc.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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