



Freedonia Focus Reports
US Collection

Diesel Engines: United States

July 2019



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About This Report

Scope

This report forecasts to 2023 US diesel engine demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- engines
- parts

Total demand is also segmented by market as follows:

- off-road equipment
- motor vehicles
- stationary equipment
- other mobile equipment such as marine, railroad, aerospace equipment, and motorcycles

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; shipments and the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Associated external engine products like fuel handling systems, storage tanks, and exhaust systems are not included in the scope of this report.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Diesel Engines: United States (FF45026) is based on *Global Diesel Engines*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | NAICS & SIC Codes Related to Diesel Engines

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
333618	Other Engine Equipment Manufacturing	3519	Internal Combustion Engines, Nec
		3699	Electrical Equipment and Supplies, Nec

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of

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determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Diesel Engines

Freedonia Industry Studies

Automotive Aftermarket for Batteries & Ignition System Components in North America

Automotive Aftermarket for Filters in North America

Automotive Aftermarket for Powertrain Components in North America

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North America Automotive Aftermarket

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Motor Vehicles: United States

Motorcycles: United States

Transport Equipment: United States

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Diesel Progress

Modern Power Systems

WardAuto

Agencies & Associations

Association of Diesel Specialists

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Association of Equipment Manufacturers
California Air Resources Board
Diesel Technology Forum
International Council on Clean Transportation
Mine Safety and Health Administration
Occupational Safety and Health Administration
Truck & Engine Manufacturers Association
United States Census Bureau
United States Energy Information Administration
United States International Trade Commission