

Global Diesel Engine Market

Industry Study with Forecasts for 2020 & 2025

Study #3488 | January 2017 | \$6300



Developing nations to register most rapid growth

More than half of all new global diesel engine product demand generated between 2015 and 2020 will be in the Asia/Pacific region, buoyed by robust growth in China and India. Product demand in the region will increase sharply due to growth in motor vehicle production, and strong off-highway mobile machinery output gains.

The regions of Central and South America and Africa/Mideast will record the fastest sales advances through 2020. Demand in both regions will be spurred by growth in motor vehicle production, and foreign multinationals will continue to invest in the manufacturing sectors of both regions based on their market growth potential.

Sales of diesel engines in Eastern Europe and Western Europe will be boosted by increased equipment output by manufacturers in both regions. However, Eastern Europe will post faster growth because of stronger motor vehicle shipment gains.

Demand for diesel engines in North America will slow as motor vehicle production in the US and Mexico slows and output in Canada declines. In the US medium and heavy truck and bus production will stagnate and light motor vehicle output growth will moderate, negatively impacting related diesel engine demand. The motor vehicle sector of the diesel engine market in Mexico will account for nearly all new product demand in that nation.

Off-highway & other mobile equipment diesel engine sales to flourish

Global demand for off-highway and other mobile equipment diesel engines will post annual gains through 2020 well above the overall average. While equipment sales fell between 2013 and 2015, demand is expected to recover as agricultural, construction, forestry, and mining activity grows. In response, manufacturers are expected to ramp up production, generating additional diesel engine demand. Sales of motor vehicle diesel engines for motor vehicle applications will be fueled by a rebound in medium and heavy vehicle output. Solid advances in automobile production will also contribute to growth, though stiffer competition from electric and hybrid vehicles will limit demand increases to some extent.

Study coverage

This Freedonia study analyzes the \$180 billion worldwide diesel engine market. It presents historical production, trade, and demand data (2005, 2010, 2015) plus forecasts (2020, 2025) for diesel engine demand by market (light motor vehicles, medium and heavy motor vehicles, off-highway and other mobile equipment, and stationary equipment) and product (complete diesel engines and parts). The study also evaluates company market share and offers competitive analysis on industry players such as BMW, Bosch, Caterpillar, CNH Industrial, Cummins, Daimler, Deere, Ford, Komatsu, Mitsubishi Heavy Industries, Peugeot, Renault, Toyota, and Volkswagen.

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Table 6-14 | Thailand: Diesel Engine Supply & Demand (million dollars)

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|--|------|------|------|------|------|
| Gross Domestic Product (bil 2014\$) | | | | | |
| % fixed investment | | | | | |
| Gross Fixed Investment (bil 2014\$) | | | | | |
| \$ diesel engines/000\$ fixed investment | | | | | |
| Diesel Engine Demand | | | | | |
| net exports | | | | | |
| Diesel Engine Shipments | | | | | |
| % Thailand | | | | | |
| Asia/Pacific Diesel Engine Shipments | | | | | |

Source: The Freedonia Group

OTHER REGIONS

Argentina

Demand for diesel engines in Argentina was \$1.4 billion in 2015. The country was responsible for 20 percent of regional product sales in that year. Light motor vehicles are the most important market for diesel engines in Argentina because of the country's large automobile industry and the local popularity of diesel models. However, diesel vehicles account for a larger share of Argentina's light vehicle stock than they do of local vehicle production because diesel passenger cars are banned in Brazil, a major export market. From 2010 to 2015, sales of diesel engines were flat because of a recent drop in motor vehicle production caused by weaker economic conditions. Advances in demand for off-highway diesel engines and MRO automotive engines and parts moderated

With 2015 diesel engine shipments of \$780 million, Argentina accounted for 16 percent of regional output. The country recorded a trade deficit of \$660 million in 2015, equivalent to nearly half of product demand. Brazil and Mexico are the largest suppliers of diesel engines to the region. A 2005 became a major investment region. Within the region, more than double the local supply. Overall, demand in 2015 period domestic market conditions

Demand for diesel engines in Argentina is expected to increase by 1.5 percent per annum to 2025.

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Table 6-17 | Indonesia: Diesel Demand by Market & Product (million dollars)

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|--------------------------------------|------|------|------|------|------|
| Asia/Pacific Engine Demand | | | | | |
| % Indonesia | | | | | |
| Diesel Engine Demand | | | | | |
| By Market: | | | | | |
| Motor Vehicles | | | | | |
| Light Vehicles | | | | | |
| Medium & Heavy Trucks & Buses | | | | | |
| Off-Highway & Other Mobile Equipment | | | | | |
| Stationary Equipment | | | | | |
| By Product: | | | | | |
| Engines | | | | | |
| Parts | | | | | |

Source: The Freedonia Group

Related Studies

Battery Markets in the US

Demand for batteries in the US is forecast to rise 4.4 percent per annum through 2020 to \$17.7 billion. Rechargeable batteries will register larger and faster gains than single-use batteries. Motor vehicle batteries will see the largest demand increases in dollar terms, while the industrial market offers the greatest growth potential. The study provides historical data plus forecasts for 2020 and 2025 by application (motor vehicle, portable device, other) and end user. The study also details the industry structure and analyzes company market share.

#3483..... January 2017 \$4900

Global Internal Combustion Engine (ICE) & Related Filters Market

World demand for ICE and related filters will rise 4.7 percent annually to \$34.0 billion in 2020. The US and China were the largest national markets for ICE filters in 2015, but China will become the largest ICE filter-using country in 2025. The motor vehicle market will remain dominant through 2020. This study assesses the \$27 billion global ICE and related filters market, with forecasts for 2020 and 2025 for supply and demand, plus demand by type and market, in 6 regions and 22 countries. The study also analyzes company market share and profiles key players.

#3481..... January 2017 \$6400

Synthetic Lubricants & Functional Fluids Market in the US, 5th Edition

US demand for synthetic lubricants and functional fluids is expected to rise 5.5 percent yearly to \$5.7 billion in 2020. Market gains will be driven by rising penetration of synthetics into markets that have been dominated by conventionally formulated products. Engine oils will remain the largest product category and will undergo the fastest change. This study offers historical demand plus forecasts for 2020 and 2025 for the \$43.2 billion US market, with by product, material and market. The study also details company market share and lists industry participants.

#3478..... January 2017 \$5400

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will rise 3.2 percent annually to \$11.7 billion in 2019. Turf and grounds equipment and hedge trimmers will be the fastest growing products, while lawnmowers remain the largest segment. Growth in the commercial market will continue to outpace the dominant residential segment. This study analyzes the \$10 billion US power lawn and garden equipment industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry competitors.

#3340..... December 2015 \$5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

About The Freedonia Group

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