



**Large Reciprocating Gas
Compressors Global Market
Assessment**

Client	Europe-based manufacturer and supplier of process equipment, including pumps, compressors and boilers
Industry	Air compression for industrial processes
Products	Reciprocating Gas Compressor

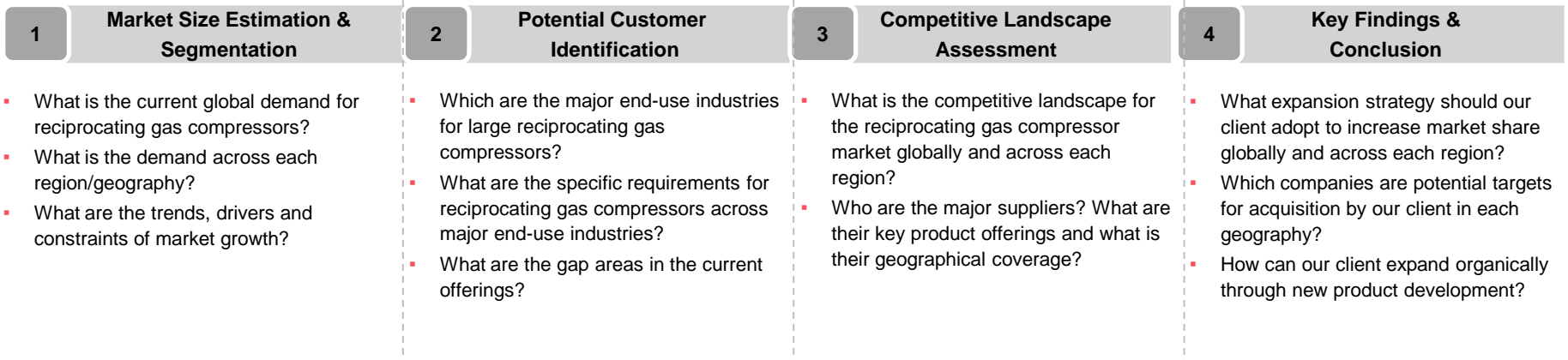
Context

- To strengthen market positioning in the large reciprocating gas compressors segment, our Europe-based manufacturer of gas compressors client wanted to evaluate the global market, with a specific focus on North America, South America, Western and Central Europe, Eastern Europe (CIS countries), Middle East and Asia.

Our Key Business Questions

- How big is the market for reciprocating gas compressors? How is the market demand split across the key focus regions?
- What are the key application areas and customer segments? What are their typical requirements for large reciprocating gas compressors?
- Who are the key competitors? How deep is their presence in each focus region? How do they operate in the market?

Engagement Scope



Research Methodology

Secondary Research

- Conducted desk research to gain an overall understanding of the market and competitive landscape.
- Researched industry association websites, industry journals, subscribed databases, portals, press releases and industry reports.

Primary Research

- 200+ telephone interviews with compressor manufacturers, distributors, service providers, packagers and industry experts across all regions.

Sample Analysis

1 Market Size Estimation & Segmentation

Market Size – Global Large Reciprocating Gas Compressors

Reciprocating gas compressor market is expected to grow at a xx% CAGR during 2014-2020, with “xx% of the demand arising from North America”, “Middle East and Africa” and Asia-Pacific.

Global Large Reciprocating Gas Compressors Market¹ (6 Mo, 2014-2020)

As of 2014, a significant proportion (“xx%”) of the demand for large reciprocating gas compressors was from three regions—North America², Middle East and Africa and Asia-Pacific (including China). North America, the demand for natural gas is expected to increase with a significant rate of additional supply.

Market Size Overview and Split by Region and Gases

The global reciprocating gas compressors market is expected to grow at a xx% CAGR during 2015-2020 with “xx% of the demand coming from North America”, “Middle East and Africa” and APAC.

Global Reciprocating Gas Compressors Market – by Region (2014-2020)

Global Reciprocating Gas Compressors Market – by Gases (2015)

100% - XXXXX Mn

100% - XXXXX Mn

2 Potential Customer Identification

Usage of Compressors across Key Industry (2/3)

Reciprocating gas compressors are mainly used for EOR and acid gas injection in oil & gas industry and for LDPE, LOPP and ammonia processing and hydrotreating in petrochemicals and refinery.

Oil & Gas **Petrochemicals and Refinery** **Industrial Gases**

End-use Industries: Petrochemicals and Refinery (1/3)

In the petrochemicals and refinery industries, majority of the respondents are using reciprocating gas compressors; they are not willing to use Chinese parts.

Respondents’ Usage¹ – Petrochemicals and Refinery

Reciprocating Compressor – Demand By Application²

Reciprocating Compressor – % of Brand Usage³

Reciprocating Compressor – Willingness to Use Chinese Parts⁴

3 Competitive Landscape Assessment

Reciprocating Gas Compressors: Competitive Landscape

Global reciprocating gas compressors market is dominated by large manufacturers, A holds a major portion of the market.

Industry Market Share of Compressor Manufacturers – Reciprocating Gas Compressors (2014)

100% - XXXXX Mn

Reciprocating Gas Compressors: Key Players (1/2)

Leading reciprocating gas compressors manufacturers have marked their presence worldwide to cater the requirements of the end-users due to high degree of competition.

Company Name	Product Range (Mn)	North America	Europe	Latin America	Asia Pacific	Middle East and Africa
A	100-40,000	✓	✓	✓	✓	✓
B	100-25,000	✓	✓	✓	✓	✓
C	100-10,000	✓	✓	✓	✓	✓
D	100-10,000	✓	✓	✓	✓	✓
E	10-10,000	✓	✓	✓	✓	✓
F	100-10,000	✓	✓	✓	✓	✓
G	10-10,000	✓	✓	✓	✓	✓
H	10-10,000	✓	✓	✓	✓	✓
I	10-10,000	✓	✓	✓	✓	✓
J	10-10,000	✓	✓	✓	✓	✓
K	10-10,000	✓	✓	✓	✓	✓
L	10-10,000	✓	✓	✓	✓	✓
M	10-10,000	✓	✓	✓	✓	✓
N	10-10,000	✓	✓	✓	✓	✓

4 Key Findings & Conclusion

Potential Held by Each Region

Below is a graphical representation, where six regions have been compared based on parameters such as reciprocating gas compressors demand, growth rate and end-use industries applications:

Potential Held by Each Focus End-use Industry

Oil & gas and petrochemicals and refinery industries have a huge potential in terms of current reciprocating gas compressors demand and growth prospects.

Electronics, Power Generation and Refinery

Construction, Mining and Metals

Oil & Gas

Benefits to Client

- We helped our client assess the global reciprocating gas compressor market in detail, and develop the best strategy to further strengthen global presence.
- Our insights enabled our client to zero in on targets for acquisition wherever we recommended inorganic growth strategy, and provided a 360 degree view of the companies (including technological capabilities, market share and geographical presence).
- We also enabled our client to develop a roadmap for new product development wherever we recommended organic growth.

Thank you

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