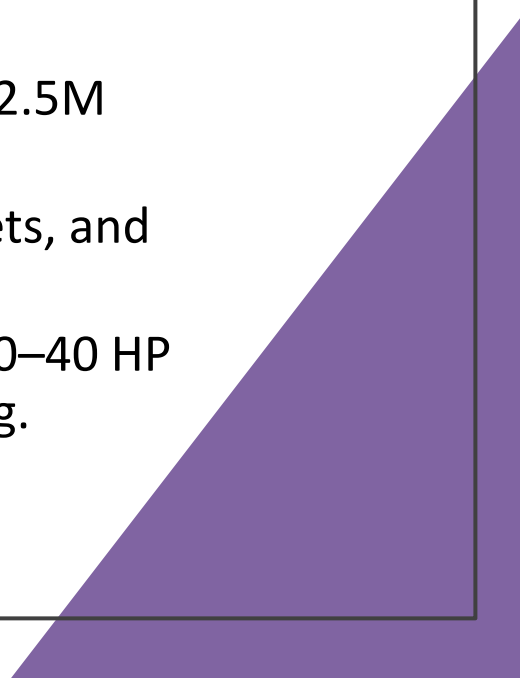




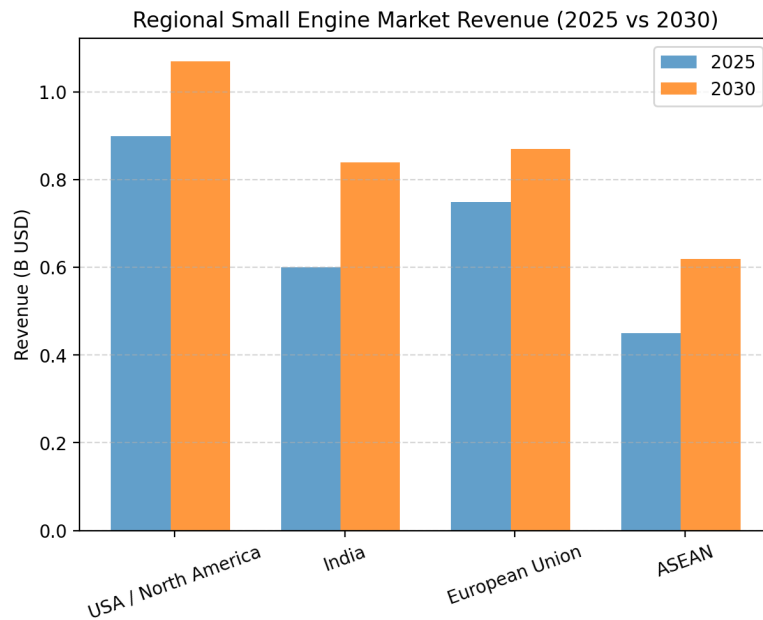
# Global Market Intelligence 2025–2030

Strategic Outlook | Growth Metrics |  
Regional Opportunities

# Global Market Overview

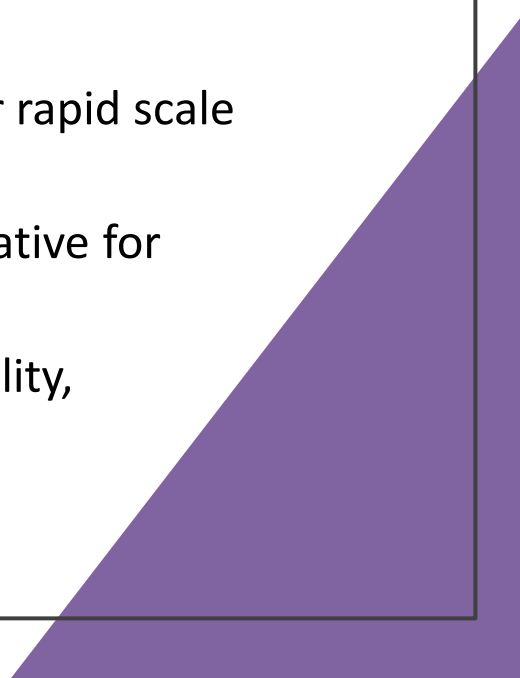
- Global small-engine market projected to grow from \$3.2B (in 2025) to \$4.06B (in 2030) — ~27% increase.
  - Total production rising from 9.9M units in 2025 to 12.5M units in 2030 (+2.6M units).
  - CAGR: ~5.0%, driven by portable power, small gensets, and hybrid OPE demand.
  - <10 HP engines remain dominant (~70% of units); 10–40 HP segment offers RotaPower LLC' strongest positioning.
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# Regional Growth Outlook (2025–2030)



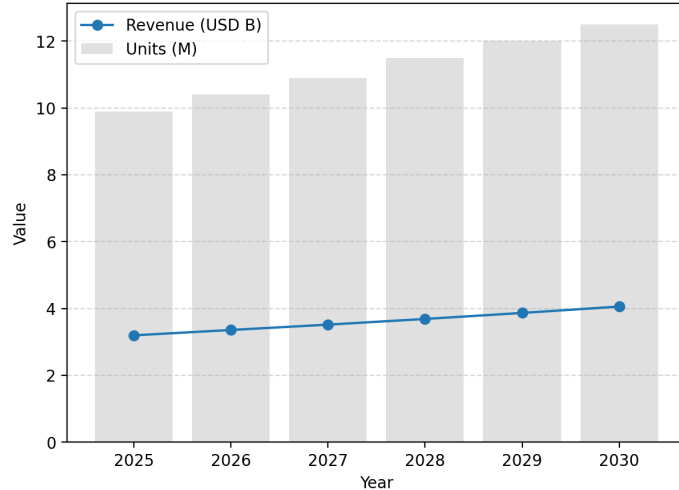
- India (7%) and ASEAN (6.5%) lead global expansion, driven by rural electrification, light construction, and 2–3W mobility.
- USA (3.5%) and EU (3.0%) show steady replacement-driven demand.
- Asia-Pacific to contribute >60% of incremental unit growth by 2030.

# RotaPower LLC — Strategic Focus Areas

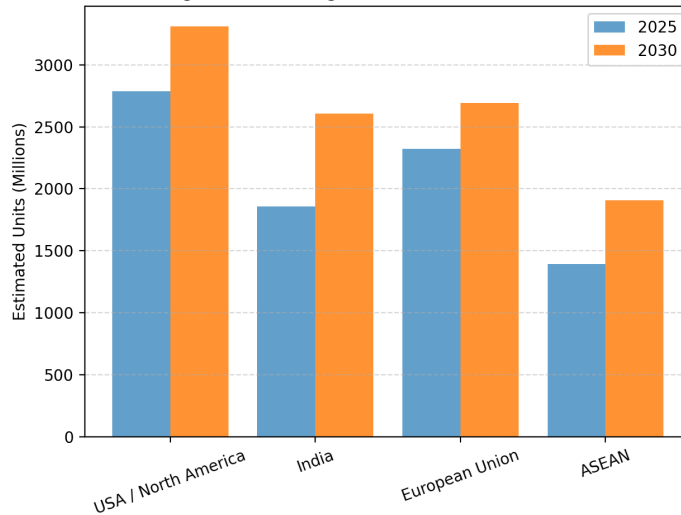
- Target the 10–40 HP segment for OEM and genset applications (highest value CAGR 5–6%).
  - Leverage licensing partnerships in India and ASEAN for rapid scale and cost advantage.
  - Position Rotapower® as a clean, efficient rotary alternative for compact and hybrid power.
  - Focus on differentiated performance metrics — reliability, emissions, and lifecycle cost.
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# Visual Summary — Revenue & Unit Growth

Global Small Engine Market Growth Projection (2025–2030)



Regional Small Engine Unit Share (2025 vs 2030)



# HP-Class Segmentation — 2025 Baseline

HP Class	Avg Price (USA, \$)	Avg Price (India, \$)	Units (M)	Share (%)
<10 HP	350	220	7.0	70%
10–20 HP	500	350	2.0	20%
20–40 HP	800	600	0.64	6%
40–80 HP	1200	900	0.21	2%
>80 HP	1800	1400	0.05	1%

# HP-Class Growth Forecast — 2025 to 2030

HP Class	2025 Units (M)	2030 Units (M)	$\Delta$ Units (M)	Growth (%)
<10 HP	7.0	8.9	+1.9	+27%
10–20 HP	2.0	2.5	+0.5	+25%
20–40 HP	0.64	0.82	+0.18	+28%
40–80 HP	0.21	0.27	+0.06	+29%
>80 HP	0.05	0.06	+0.01	+25%

# Regional Unit Expansion — 2025 to 2030

Region	2025 Units (M)	2030 Units (M)	Δ Units (M)	Growth (%)
USA / North America	2.8	3.3	+0.5	+18%
India	1.9	2.7	+0.8	+42%
European Union	2.3	2.7	+0.4	+17%
ASEAN	1.5	2.3	+0.8	+53%

# Pricing Benchmark — USA vs India (USD, 2025)

HP Class	USA Price (\$)	India Price (\$)	Price Differential (%)
<10 HP	350	220	-37%
10–20 HP	500	350	-30%
20–40 HP	800	600	-25%
40–80 HP	1200	900	-25%
>80 HP	1800	1400	-22%

# Global Summary Metrics (2025–2030)

- Total market revenue: \$3.2B → \$4.06B (+27%).
  - Unit production: 9.9M → 12.5M (+26%).
  - Top growth segments: <10 HP and 10–40 HP (account for 80% of total growth).
  - Regional leaders: India and ASEAN (combined +1.6M units, >60% of global gain).
  - USA/EU remain stable, focusing on premium OPE and hybrid markets.
  - RotaPower LLC opportunity: dominate 10–40 HP class with Rotapower® technology in OEM and genset channels.
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