

# Global AIDC Diesel Generator Sets Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global AIDC Diesel Generator Sets market size is expected to reach \$ 7430 million by 2032, rising at a market growth of 12.5% CAGR during the forecast period (2026-2032).

AIDC diesel generator sets are complete diesel standby power systems used in AI data centers, GPU-cluster data centers, high-density cloud-computing campuses, and hyperscale colocation facilities. A typical system includes a diesel engine, alternator, controller, cooling system, starting system, fuel system, base frame or container, acoustic package, emissions aftertreatment, and paralleling interface. The statistical scope includes open-skid, sound-attenuated, containerized, medium-voltage, and modular diesel generator sets, while excluding standalone diesel engines, UPS, battery energy storage, gas gensets, gas turbines, ATS, paralleling switchgear, distribution panels, bulk fuel tanks, installation, and O&M services. Compared with conventional data centers, AIDC applications place greater emphasis on above-2 MW units, medium-voltage output, large-scale paralleling, rapid deployment, high reliability, and redundancy designs suitable for AI workloads. In 2025, global sales of AIDC diesel generator sets are estimated at approximately 10.2 GW, with an average ex-factory price of around \$315/kW; the gross profit margins of leading generator set manufacturers generally range from 18% to 35%. The upstream value chain of AIDC diesel generator sets mainly includes diesel engines, alternators, steel, copper, controllers, radiators, pumps, fans, batteries, starter motors, fuel pumps, tanks, silencers, vibration isolators, wiring harnesses, cables, sensors, circuit breakers, emissions aftertreatment systems, acoustic enclosures, containers, and coating materials. The midstream consists of diesel generator set manufacturers, modular power-equipment manufacturers, and data center standby-power integrators, which are responsible for engine-alternator matching, genset structural design, cooling and noise

control, control-system development, paralleling-interface design, factory testing, and project delivery. Downstream customers include AI cloud service providers, internet platforms, compute-leasing platforms, colocation operators, telecom carriers, financial institutions, government computing centers, and large enterprise data centers. The core competitive factors are not only engine sourcing capability, but also high-power genset integration, medium-voltage output, batch delivery, data center project certification experience, on-site commissioning, and long-term maintenance response.

This report studies the global AIDC Diesel Generator Sets production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AIDC Diesel Generator Sets and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AIDC Diesel Generator Sets that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global AIDC Diesel Generator Sets total production and demand, 2021-2032, (MW)

Global AIDC Diesel Generator Sets total production value, 2021-2032, (USD Million)

Global AIDC Diesel Generator Sets production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MW), (based on production site)

Global AIDC Diesel Generator Sets consumption by region & country, CAGR, 2021-2032 & (MW)

U.S. VS China: AIDC Diesel Generator Sets domestic production, consumption, key domestic manufacturers and share

Global AIDC Diesel Generator Sets production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MW)

Global AIDC Diesel Generator Sets production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MW)

Global AIDC Diesel Generator Sets production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MW)

This report profiles key players in the global AIDC Diesel Generator Sets market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Caterpillar, Cummins, Rolls-Royce, Mitsubishi Heavy Industries, Weichai Holding, Yanmar, Generac, Shanghai Cooltech Power, Tellhow Sci-Tech, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AIDC Diesel Generator Sets market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MW) and average price (US\$/KW) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AIDC Diesel Generator Sets Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AIDC Diesel Generator Sets Market, Segmentation by Type:

1?2MW

2?3MW

Others

#### Global AIDC Diesel Generator Sets Market, Segmentation by Enclosure Type:

Open-Skid Gensets

Sound-Attenuated Gensets

Containerized Gensets

Skid-Mounted Gensets

Modular Power Units

#### Global AIDC Diesel Generator Sets Market, Segmentation by Application:

AI Training Data Centers

High-Density GPU Computing Campuses

AI Inference Data Centers

Hyperscale Cloud and Colocation Data Centers

#### Companies Profiled:

Caterpillar

Cummins

Rolls-Royce

Mitsubishi Heavy Industries

Weichai Holding

Yanmar

Generac

Shanghai Cooltech Power

Tellhow Sci-Tech

Key Questions Answered:

1. How big is the global AIDC Diesel Generator Sets market?
2. What is the demand of the global AIDC Diesel Generator Sets market?
3. What is the year over year growth of the global AIDC Diesel Generator Sets market?
4. What is the production and production value of the global AIDC Diesel Generator Sets market?
5. Who are the key producers in the global AIDC Diesel Generator Sets market?
6. What are the growth factors driving the market demand?

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