

Generator Sales Market Report by Fuel Type (Diesel, Gas, and Others), Power Rating (Below 75 kVA, 75-375 kVA, 375-750 kVA, Above 750 kVA), Application (Continuous Load, Peak Load, Stand by Load), End User (Residential, Commercial, Industrial), and Region 2026-2034

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Abstracts

The global generator sales market size reached USD 30.6 Billion in 2025. Looking forward, IMARC Group expects the market to reach USD 45.7 Billion by 2034, exhibiting a growth rate (CAGR) of 4.45% during 2026-2034. The increasing demand for reliable power supply, the widespread adoption of renewable energy sources, expanding industrial sectors, such as construction and telecommunications, significant technological advancements, improving efficiency and portability, and heightened consumer awareness of energy solutions are some of the major factors propelling the market growth.

GENERATOR SALES MARKET ANALYSIS:

Major Market Drivers: The increasing demand for reliable power sources represents the major driver in the market. Frequent power outages and infrastructure vulnerabilities push consumers and businesses to invest in generators as essential backup solutions. In line with this, the growing industrial and commercial sectors, including construction and telecommunications, require uninterrupted power for operations, further boosting generator sales.

Key Market Trends: The growing focus on eco-friendly and efficient products represents the key trend of the market. Manufacturers are increasingly

developing generators that use cleaner fuels, such as natural gas or biodiesel, to meet environmental regulations and consumer preferences for sustainable solutions. Furthermore, advancements in technology have led to the introduction of smart generators equipped with features like remote monitoring and automatic start capabilities.

Geographical Trends: Asia Pacific accounts for the largest region in the market across the globe. Rapid urbanization, industrial growth, and an increasing energy demand due to population expansion are driving the generator sales market growth across the region. Frequent power outages in developing countries also boost the need for reliable backup power solutions.

Competitive Landscape: Some of the major market players in the generator sales industry include ABB Ltd., Atlas Copco AB, Bharat Heavy Electricals Limited, Briggs & Stratton, Caterpillar, Cummins Inc., GE Vernova, Generac Power Systems, Inc., Mitsubishi Heavy Industries Ltd., Rehlko, Rolls-Royce plc, Siemens AG, Toshiba Corporation, Wacker Neuson SE and Wartsila, among many others.

Challenges and Opportunities: The market faces various challenges including the increasing competition from alternative energy sources like solar and wind, which can provide sustainable power solutions. However, the market also faces several opportunities such as developing hybrid systems that combine generators with renewable energy, catering to eco-conscious consumers. The rising need for backup power in residential and commercial sectors, along with advancements in technology, such as smart generators, also presents significant growth potential, allowing manufacturers to innovate and capture new market segments.

GENERATOR SALES MARKET TRENDS:

Increasing Demand for Reliable Power Supply

With the growing reliance on electricity in both residential and commercial sectors, the demand for reliable power sources has surged. According to Organisation for Economic Co-operation and Development (OECD) reports, in June 2024, the total net electricity production reached 902.8 TWh, increasing by 5.4% as compared to the same period last year. On a year-to-date basis, the total net electricity production increased by 2.9%

in the first two quarters of 2024. Unplanned power outages due to natural disasters, infrastructure issues, or increased energy consumption have led consumers and businesses to invest in generators as backup power solutions. This is particularly evident in areas prone to extreme weather or unreliable power grids. For instance, in September 2024, over 1.6 million homes and businesses in the Carolinas, Georgia, Florida, and other US Southeastern and Midwestern states were still without power after Helene slammed into the Florida Panhandle as a major hurricane. Those outages were down from around 2.1 million earlier in the day as utilities continued to restore power. Such statistics reflect on the critical need for reliable and uninterrupted power supply, which is facilitating the sales of generators.

Widespread Adoption of Renewable Energy

The transition toward renewable energy sources such as solar and wind has spurred interest in generators, particularly hybrid systems that can work alongside these technologies. As more households and businesses install solar panels, the need for backup generators to ensure continuous power supply during low production periods (e.g., at night or during cloudy days) is increasing. This trend is further fueled by government incentives promoting clean energy solutions. For instance, in October 2023, Canadian Solar Inc., headquartered in Guelph, Ontario, announced that it is establishing a 5 GW Solar PV cell production facility at the River Ridge Commerce Center in Jeffersonville, Indiana. Canadian Solar is building a state-of-the-art solar photovoltaic (PV) cell manufacturing plant with an annual output of 5 GW, equivalent to approximately 20,000 high-power modules per day.

Industrial Growth and Infrastructure Development

The expansion of various industries, such as construction, telecommunications, and data centers, necessitates a continuous power supply for operations, which, in turn, is creating a positive generator sales market outlook. Generators are vital for providing power at construction sites, supporting critical infrastructure projects, and ensuring data centers remain operational. As economies grow and infrastructure development accelerates, the demand for generators is likely to rise significantly. For instance, in November 2023, Hitachi Energy, a global technology leader that is advancing a sustainable energy future for all, unveiled the HyFlex™ demonstration unit, its Hydrogen Power Generator in Gothenburg, Sweden. During an event held with Hitachi Energy's technology partner, PowerCell Group, around 100 senior representatives from companies in various industries took part in the demonstration. Key applications include construction sites in remote locations or noise- and pollution-sensitive cities; mining

sites to power the increasing number of electrically powered equipment like dump trucks and excavators; data centers, hospitals, and hotels that require an emergency backup supply of power and/or heat; and shore-to-ship applications at ports to sustainably power ships at berth as an alternative to diesel generators.

GENERATOR SALES MARKET SEGMENTATION:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2026-2034. Our report has categorized the market based on fuel type, power rating, application, and end user.

Breakup by Fuel Type:

Diesel

Gas

Others

Diesel accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the fuel. This includes diesel, gas, and others. According to the report, diesel represented the largest segment.

Diesel holds the largest share of the market primarily due to its efficiency, reliability, and availability. Diesel generators provide high power output and longer run times as compared to other fuel types, making them ideal for industrial and commercial applications. Additionally, diesel fuel is widely accessible, especially in regions with underdeveloped infrastructure. The ability to operate in various environments, along with lower fuel consumption rates, further enhances diesel generators' appeal, solidifying their dominant position in the market.

Breakup by Power Rating:

Below 75 kVA

75-375 kVA

375-750 kVA

Above 750 kVA

375-750 kVA holds the largest share of the industry

A detailed breakup and analysis of the market based on the power rating have also been provided in the report. This includes below 75 kVA, 75-375 kVA, 375-750 kVA, and above 750 kVA. According to the report, 375-750 kVA accounted for the largest market share.

Generators in the 375-750 kVA range account for most of the market share due to their versatility and suitability for various applications. This power range is ideal for medium to large commercial and industrial operations, including construction sites, data centers, and manufacturing facilities, where reliable power is critical. Additionally, these generators strike a balance between power output and fuel efficiency, making them cost-effective solutions for businesses. Their capacity to handle peak loads and support essential operations further drives their popularity in the generator sales market.

Breakup by Application:

Continuous Load

Peak Load

Stand by Load

The report has provided a detailed breakup and analysis of the market based on the application. This includes continuous load, peak load, and stand-by load.

Continuous load generators are designed for applications requiring a constant power supply, such as manufacturing facilities, hospitals, and data centers. They account for a significant share of the generator sales market because businesses often need uninterrupted power to maintain operations and prevent downtime. These generators are built for long-term use, providing stable electricity under varying conditions. Their reliability and ability to handle sustained power demands make them essential in

industries where a consistent energy supply is critical for productivity and operational efficiency.

Peak load generators are utilized to handle short bursts of high energy demand that exceed the normal operating capacity of primary power sources. This type of generator is vital for industries that experience fluctuating energy requirements, such as construction sites or large commercial buildings. They contribute significantly to the generator sales market because they ensure that operations can continue during peak times without overloading the main power supply. Their ability to provide temporary power relief makes them indispensable for managing energy consumption efficiently and maintaining operational continuity.

Standby load generators serve as backup power sources during outages or disruptions in the primary electricity supply. They are critical for businesses that rely on uninterrupted power, such as healthcare facilities, telecommunications, and food storage. Their significant market share stems from the growing need for emergency preparedness and reliability in various sectors. Standby generators ensure that essential operations can continue without interruption, making them a preferred choice for organizations prioritizing resilience and operational stability against unexpected power failures.

Breakup by End User:

Residential

Commercial

Industrial

Industrial exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes residential, commercial, and industrial. According to the report, industrial accounted for the largest market share.

The industrial sector accounts for most of the market share due to its high demand for reliable and continuous power supply. Industries such as manufacturing, construction, and mining require substantial energy to operate machinery and equipment, making

generators essential for maintaining productivity. Additionally, the risk of power outages in industrial settings can lead to significant financial losses, driving businesses to invest in generators as a safeguard. The versatility of generators in handling varying load demands further solidifies their importance in industrial applications.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest generator sales market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represents the largest regional market for generator sales.

Government initiatives promoting infrastructure development and energy security play a crucial role in the market growth across the Asia Pacific region. For instance, the Ministry of New and Renewable Energy, Government of India (GoI) announced the implementation of the National Green Hydrogen Mission, approved by the Union Cabinet on 4th January 2023, with an outlay of ₹ 19,744 crore. The overarching objective of the Mission is to make India the Global Hub for the production, usage, and export of Green Hydrogen and its derivatives. Rapid industrialization and urbanization are leading to increased energy demand, necessitating reliable power sources in both commercial and residential sectors. Frequent power outages further heighten the need for backup generators. Additionally, the growing interest in renewable energy sources has led to a rise in hybrid generator systems, which combine traditional generators with renewable technologies, catering to eco-conscious consumers and expanding market opportunities.

COMPETITIVE LANDSCAPE:

The market features a competitive landscape with key players such as Cummins Inc., Generac Holdings, Kohler Co., and Honda Power Equipment dominating the industry. These companies focus on innovation, product diversification, and expanding their distribution networks to enhance market presence. Additionally, regional manufacturers are emerging, offering cost-effective solutions tailored to local demands. The competition is intensifying as companies invest in hybrid technologies and sustainable energy solutions to meet evolving consumer preferences and regulatory requirements in the generator market. For instance, in April 2024, ABB announced a minority investment in GridBeyond, a leading technology player providing energy management solutions based on artificial intelligence and data science that will enable our customers to optimize distributed energy resources and industrial loads. The investment was made through ABB Ventures.

The report provides a comprehensive analysis of the competitive landscape in the global generator sales market with detailed profiles of all major companies, including:

ABB Ltd.

Atlas Copco AB

Bharat Heavy Electricals Limited

Briggs & Stratton

Caterpillar

Cummins Inc.

GE Vernova

Generac Power Systems, Inc.

Mitsubishi Heavy Industries Ltd.

Rehiko

Rolls-Royce plc

Siemens AG

Toshiba Corporation

Wacker Neuson SE

Wartsilä?

KEY QUESTIONS ANSWERED IN THIS REPORT

How has the global generator sales market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global generator sales market?

What is the impact of each driver, restraint, and opportunity on the global generator sales market?

What are the key regional markets?

Which countries represent the most attractive generator sales market?

What is the breakup of the market based on the fuel type?

Which is the most attractive fuel type in the generator sales market?

What is the breakup of the market based on the power rating?

Which is the most attractive power rating in the generator sales market?

What is the breakup of the market based on the application?

Which is the most attractive application in the generator sales market?

What is the breakup of the market based on the end user?

Which is the most attractive end user in the generator sales market?

What is the competitive structure of the market?

Who are the key players/companies in the global generator sales market?

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