

Power Rental Market Report by Fuel Type (Diesel, Natural Gas, and Others), Equipment Type (Generator, Transformer, Load Bank, and Others), Power Rating (Up to 50 kW, 51 –500 kW, 501 –2,500 kW, Above 2,500 kW), Application (Peak Shaving, Standby Power, Base Load/Continuous Power), End Use Industry (Utilities, Oil & Gas, Events, Construction, Mining, Data Centers, and Others), and Region 2024-2032

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Abstracts

The global power rental market size reached US\$ 20.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 35.5 Billion by 2032, exhibiting a growth rate (CAGR) of 6.1% during 2024-2032. The growing severity of natural disasters such as hurricanes, floods, and earthquakes, the increasing need for emergency power to support rescue operations, and the integration of advanced technologies are among the key factors driving the market growth.

Power rental refers to the hiring of generators or other electrical equipment that can supply power on a temporary basis. This service is commonly used in situations where the existing power supply is insufficient, unavailable, or unreliable. Industries, such as construction, events management, and emergency relief often rely on power rentals to ensure continuous operations. Instead of investing in expensive equipment, businesses opt for renting to save on upfront costs and maintenance. The rental companies usually offer a complete package that includes delivery, setup, and removal, making it a convenient option for clients. This arrangement is particularly beneficial during peak seasons, natural disasters, or planned maintenance activities when the need for extra power is temporary. By providing flexibility and scalability, power rental services enable

businesses to meet their energy requirements efficiently and economically.

The increasing frequency and severity of natural disasters such as hurricanes, floods, and earthquakes majorly drive the global market. These events often lead to a sudden and overwhelming need for emergency power to support rescue operations, medical facilities, and basic infrastructure, such as water treatment and telecommunications. In such scenarios, the quickest and most effective solution is to employ rental power solutions, as these can be deployed rapidly and require minimal setup time. As businesses expand into more isolated areas, the power rental market is poised for growth, offering scalable solutions that can meet specific energy demands without requiring a permanent infrastructure investment. Along with this, the widespread adoption of power rental among businesses that may not have the financial resources for a full-time, dedicated power system is significantly supporting the market. In addition, various governments are acknowledging the importance of reliable power in boosting economic growth and are therefore supporting the power rental market through favorable policies. Moreover, the integration of advanced technologies including IoT (Internet of Things), machine learning, and real-time data analytics is creating a positive market outlook.

Power Rental Market Trends/Drivers:

Infrastructure Development and Urbanization

The relentless pace of urbanization and infrastructure development in emerging economies is one of the key market drivers for the power rental industry. As cities expand and infrastructure projects multiply, the requirement for reliable power sources grows proportionally. Construction activities, including building commercial and residential properties, as well as public infrastructure mainly roads and bridges, demand high amounts of power for equipment and machinery. Given that these are generally temporary needs, companies are more inclined to rent power equipment rather than purchase and maintain them. This tendency has led to a rise in demand for power rentals, making it an integral part of modern urban development projects.

Seasonal and Event-Driven Requirements

Another significant driver is the seasonal and event-based need for additional power. Along with this, the escalating agricultural operations that require extra power during harvest seasons, or large-scale events including concerts and sports tournaments that need temporary but substantial electrical supply are significantly supporting the market. These requirements are often short-lived and highly specific, making rental power a

more cost-effective and convenient solution compared to permanent installations. In addition, the flexibility offered by rental agreements allows businesses and event organizers to scale their power requirements up or down as needed, optimizing costs and ensuring reliable supply. Moreover, the increasing number of large-scale events and seasonal industries opting for power rentals demonstrates the growing reliance on this market.

Stringent Emissions Regulations

Environmental concerns and stringent emissions regulations are also shaping the power rental industry. In confluence with this, governments around the world are imposing stricter laws on emissions from power generation equipment, pushing companies to opt for cleaner, more efficient technologies. This change has led to a rise in the demand for eco-friendly power rental solutions, such as generators that run on natural gas or renewable sources, such as solar and wind. Furthermore, rental companies are incentivized to invest in cleaner technologies to attract a broader customer base, which in turn is fueling research and development in the sector. In this way, environmental regulations are acting not as a hindrance but as a catalyst for growth and innovation in the power rental market.

Power Rental Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the power rental market report, along with forecasts at the global, regional and country levels for 2024-2032. Our report has categorized the market based on fuel type, equipment type, power rating, application, and end use industry.

Breakup by Fuel Type:

Diesel

Natural Gas

Others

Diesel account for the majority of the market share

A detailed breakup and analysis of the market based on the fuel type has also been provided in the report. This includes diesel, natural gas, and others. According to the report, diesel accounted for the largest market share.

The demand for diesel fueled generators in the power rental industry is propelled by

several market drivers. Diesel generators are known for their durability, high-energy output, and relatively lower cost of operation, making them a popular choice for heavy-duty applications such as industrial projects, construction sites, and emergency backup during power outages. The fuel is readily available and allows for easier storage and transportation compared to other fuel types, offering greater convenience and reliability. Diesel generators can also be rapidly deployed, providing a quick solution for immediate power needs, a feature that is particularly critical during natural disasters or unplanned maintenance shutdowns. While environmental concerns have led to stricter emissions standards, advancements in diesel technology have produced cleaner, more efficient models, which can meet regulatory requirements and are thus more appealing to a broad customer base.

Breakup by Equipment Type:

Generator

Transformer

Load Bank

Others

Generator represent the leading market share

The report has provided a detailed breakup and analysis of the market based on the equipment type. This includes generator, transformer, load bank, and others. According to the report, generator accounted for the largest market share.

The market for generator rentals within the power rental industry is experiencing robust growth, driven by the increased demand for reliable and continuous power supply across various sectors, including construction, events, and emergency services. In addition, generators are versatile and can be deployed quickly, making them an ideal solution for temporary power needs. Technological advancements have also played a role; newer generator models are more efficient and environmentally friendly, aligning with stringent emissions regulations. Moreover, the rise in natural disasters necessitates emergency power solutions, and generators are often the go-to equipment for rapid response. Additionally, economic considerations make renting generators a cost-effective alternative to buying, as it eliminates the need for maintenance and long-term storage. Regulatory support in the form of favorable policies and incentives further facilitates the growth of generator rentals.

Breakup by Power Rating:

Up to 50 kW
51 –500 kW
501 –2,500 kW
Above 2,500 kW

51 –500 kW represent the largest market share

The report has provided a detailed breakup and analysis of the market based on the power rating. This includes up to 50 kW, 51 –500 kW, 501 –2,500 kW, and above 2,500 kW. According to the report, 51 –500 kW accounted for the largest market share.

The 51-500 kW power rating segment is a key driver in the power rental market, enjoying considerable demand from a range of industries. These medium-capacity generators offer the ideal balance between power output and portability, making them suitable for a variety of applications, including small-to-medium sized events, construction projects, and backups for commercial establishments. Their relatively lower rental cost compared to higher-capacity units makes them an economically viable choice for businesses with limited power requirements or budgets. Additionally, these units often come with advanced technological features such as remote monitoring and automated load management, enhancing operational efficiency. The flexibility to scale up or down within this power range allows businesses to tailor their energy consumption based on real-time needs, contributing to cost savings.

Breakup by Application:

Peak Shaving
Standby Power
Base Load/Continuous Power

Base load/continuous power account for the majority of the market share

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes peak shaving, standby power, and base load/continuous power. According to the report, base load/continuous power accounted for the largest market share.

The base load or continuous power application segment is a significant market driver in the power rental industry. This segment caters to long-term, steady power requirements essential for various industries such as manufacturing, data centers, and utilities. The

constant need for power in these sectors ensures a stable and sustained demand for rental solutions. Additionally, renting equipment for base load applications is often more cost-effective than purchasing and maintaining permanent installations, particularly for businesses with fluctuating power needs. It also eliminates the challenges associated with asset depreciation and maintenance overheads. Technological advancements have led to the development of highly efficient and reliable generators that are capable of meeting the rigorous demands of continuous operation. These generators often come with features, such as real-time monitoring and predictive maintenance, reducing the likelihood of unexpected downtimes.

Breakup by End Use Industry:

- Utilities
- Oil & Gas
- Events
- Construction
- Mining
- Data Centers
- Others

Utilities represent the most market share

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes utilities, oil & gas, events, construction, mining, data centers, and others. According to the report, utilities accounted for the largest market share.

The utilities segment serves as a vital market driver for the power rental industry. Utilities often require temporary power solutions during planned maintenance, system upgrades, or unexpected outages to ensure uninterrupted service to consumers. As the demand for electricity continues to rise, utility companies face increasing pressure to maintain high levels of reliability and resilience. In addition, renting power equipment offers them the flexibility to meet these challenges without the high capital expenditure associated with owning and maintaining additional permanent facilities. This is especially crucial during peak demand seasons or emergency situations where rapid response is needed. Technological innovations in the rental market, such as advanced monitoring systems and energy-efficient generators, further align with the utilities industry's requirements for reliable and environmentally responsible power solutions.

Breakup by Region:

North America

United States

Canada

Europe

Germany

United Kingdom

France

Russia

Italy

Others

Asia Pacific

China

Japan

South Korea

India

Australia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Saudi Arabia

United Arab Emirates

South Africa

Others

North America exhibits a clear dominance, accounting for the largest power rental market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, United Kingdom, France, Russia, Italy, and others); Asia Pacific (China, Japan, South Korea, India, Australia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa (Saudi Arabia, United Arab Emirates, South Africa, and Others). According to the report, North America exhibited the largest segment.

The power rental market in North America is experiencing substantial growth, influenced by the rising frequency of extreme weather events such as hurricanes, wildfires, and storms. This is often leading to power outages that necessitate temporary power solutions. Additionally, the region's industrial and infrastructural developments demand a stable and reliable power supply, making rental power services essential for construction sites, manufacturing plants, and temporary facilities. Along with this, the North American market benefits from technological advancements in generator equipment, including more energy-efficient and environmentally compliant models, which are increasingly being adopted by businesses to meet stringent regulatory requirements.

Apart from this, the trend towards decentralization of power generation is contributing to the growth. In remote areas where connecting to the grid is challenging, power rental solutions offer an effective alternative. Economic factors also play a part; renting power equipment offers cost benefits, including no maintenance and depreciation costs, appealing to budget-conscious businesses. Moreover, regulatory support in the form of grants, tax incentives, and simplified approval processes for temporary installations encourages both suppliers and end-users to opt for rental solutions.

Competitive Landscape:

The key players are actively involved in providing temporary power solutions to various industries and sectors. These companies specialize in offering rental power equipment, such as generators, transformers, and ancillary components, to fulfill the temporary energy needs of their clients. Along with this, power rental companies are focused on maintaining a diverse fleet of well-maintained and efficient power generation equipment. They continually invest in upgrading their equipment to incorporate the latest technologies for improved fuel efficiency, reduced emissions, and enhanced performance. Additionally, these companies offer comprehensive services, including installation, maintenance, and fuel management, to ensure the seamless operation of their rented power systems. They work closely with clients to understand their specific requirements and provide tailored power solutions that match their needs. In addition, brands also emphasize reliability and quick response times. They operate 24/7 support services to address any emergencies or issues that may arise during the rental period. This dedication to customer service and prompt assistance establishes them as trusted partners in delivering uninterrupted power supply during planned maintenance, events, peak demand periods, or unexpected power outages.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been

provided. Some of the key players in the market include:

Aggreko Plc
Caterpillar, Inc.
Atlas Copco Group
Cummins, Inc.
United Rentals, Inc.
HIMOINSA S.L.
Horizon Acquisition (Horizon Power Systems)
The Hertz Corporation
Generac Power Systems
Wacker Neuson SE
Wartsilä Oyj Abp
Speedy Hire Plc
Smart Energy Solutions (SES)
SoEnergy International, Inc.

Recent Developments:

In August 2023, Atlas Copco Group acquired Climorent, a Spanish company in Catalonia that offers specialized leasing services for industrial cooling applications.

In February 2023, Aggreko Plc released a statement announcing the release of the Cat XQ330 transportable diesel generator set, a new power solution for standby and prime power applications that satisfies U.S. EPA Tier 4 Final emission regulations.

In February 2020, Cummins, Inc. introduced a 12kW mobile generator set, the newest model in the company's series of Tier 4 Final generators.

Key Questions Answered in This Report

1. What was the size of the global power rental market in 2023?
2. What is the expected growth rate of the global power rental market during 2024-2032?
3. What has been the impact of COVID-19 on the global power rental market?
4. What are the key factors driving the global power rental market?
5. What is the breakup of the global power rental market based on the equipment type?
6. What is the breakup of the global power rental market based on the fuel type?
7. What is the breakup of the global power rental market based on the power rating?
8. What is the breakup of the global power rental market based on the application?
9. What is the breakup of the global power rental market based on the end use industry?

10. What are the key regions in the global power rental market?
11. Who are the key players/companies in the global power rental market?

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