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Air-Cooled Generators Market Forecasts to 2030 – Global Analysis By Product (Diesel Generators, Gas Generators and Hybrid Generators), Type (Portable and Stationary), Power Output, System, End User and by Geography

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Abstracts

According to Stratistics MRC, the Global Air-Cooled Generators Market is accounted for $4.76 billion in 2024 and is expected to reach $7.42 billion by 2030 growing at a CAGR of 7.70% during the forecast period. Air-cooled generators are a widely used solution for power generation, designed to operate efficiently by utilizing air as the primary cooling medium. These generators do not require liquid cooling systems because they are designed with systems that dissipate heat through forced or natural air circulation. Compared to water-cooled alternatives, their design makes them more affordable, lightweight, and compact, which makes them perfect for a range of applications such as industrial processes, small-scale commercial applications, and backup power in homes.

According to the International Energy Agency (IEA), global electricity demand is expected to rise at an average annual rate of 3.4% through 2026.

Market Dynamics:

Driver:

Increasing need for dependable backup power solutions

The need for dependable backup power solutions is being driven by the growing frequency of power outages brought on by natural disasters, grid failures, and rising electricity demand. Because they provide effective power restoration during

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emergencies, air-cooled generators have become a popular option in both the residential and small commercial sectors. Additionally, they are a preferred choice for homes, small businesses, and healthcare facilities because of their ability to provide reliable performance in demanding circumstances, like heat waves or storms, which guarantees an uninterrupted power supply.

Restraint:

Low cooling effectiveness in high-power uses

The restricted cooling capacity of air-cooled generators is a major drawback that reduces their suitability for high-power or industrial applications. Furthermore, air-cooled generators only use air circulation to dissipate heat, which can cause overheating during extended or heavy use, in contrast to liquid-cooled systems that can effectively handle larger heat loads. Because of this restriction, they cannot be used in harsh environments where thermal performance is essential or in industries that need to generate power continuously.

Opportunity:

Growing attention to smart energy and home automation solutions

The need for sophisticated backup power systems, such as air-cooled generators, is being driven by the growing use of smart energy management tools and home automation systems. More and more buyers are looking for generators that can be integrated with smart home systems for smooth power management or controlled remotely via smart devices. Moreover, in order to satisfy contemporary consumer demands, this trend gives manufacturers the chance to innovate and create smart air-cooled generators with IoT connectivity, remote monitoring, and automation features.

Threat:

Fierce rivalry between liquid-cooled generators

The fierce competition from liquid-cooled generators is one of the main risks facing the market for air-cooled generators. Because of their superior cooling capabilities, liquid-cooled systems are better suited for continuous-duty and high-power applications. Air-cooled systems are usually marginalized in these profitable markets since liquid-cooled generators are preferred by large-scale operations and industries due to their durability

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and efficiency. Additionally, the growth potential of air-cooled generators is constrained by this competitive pressure, particularly in the commercial and industrial markets.

Covid-19 Impact:

There were mixed effects of the COVID-19 pandemic on the market for air-cooled generators. On the one hand, the demand for these generators, especially in the residential and small commercial segments, was driven by the growing need for dependable backup power in healthcare facilities, quarantine centers, and remote working setups. However, production and distribution suffered during lockdowns due to supply chain interruptions, manufacturing halts, and postponed infrastructure projects. Additionally, market growth was hampered by lower consumer spending in nonessential sectors during the recession. Notwithstanding these obstacles, the market is now poised for recovery and sustained growth following the pandemic due to the increased awareness of the necessity of a continuous power supply.

The Diesel Generators segment is expected to be the largest during the forecast period

The market for air-cooled generators is anticipated to be dominated by the diesel generators segment because of their extensive use in both residential and commercial settings. In regions with unstable grid infrastructure, diesel generators are perfect for both backup and primary power supply because of their reputation for dependability, durability, and high power output. Their affordability and fuel economy add to their allure, especially in areas where diesel fuel is readily available. Furthermore, these generators are widely used in data centers, healthcare facilities, and construction sites where reliable and steady power is essential.

The 100-200 kW segment is expected to have the highest CAGR during the forecast period

The market for air-cooled generators is expected to grow at the highest CAGR in the 100–200 kW segment. The growing need for mid-range power solutions in both commercial and industrial applications is the main driver of this expansion. Construction sites, healthcare facilities, and small to medium-sized businesses can all benefit from the 100–200 kW capacity range's perfect balance of power output and operational efficiency. Moreover, the demand in this market is also fueled by the expanding trend of data centers and telecom towers, especially in emerging economies, implementing backup power systems.

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Region with largest share:

The market for air-cooled generators is expected to be dominated by the North American region due to the region's strong need for dependable backup power solutions in the commercial, industrial, and residential sectors. The need for backup power systems has increased, especially in the US, as a result of frequent power outages brought on by extreme weather events like hurricanes and snowstorms. Furthermore, supporting market expansion is a firmly established construction sector, as well as rising investments in infrastructure and medical facilities. The region's dominance is a result of its robust economy, widespread adoption of cutting-edge technology, and the existence of significant market players.

Region with highest CAGR:

Due to the fast industrialization, urbanization, and expanding infrastructure development in emerging economies like China, India, and Southeast Asia, the Asia-Pacific region is anticipated to have the highest CAGR in the air-cooled generators market. This growth is being driven by the region's increasing need for dependable power solutions in industries like telecommunications, healthcare, and construction. The growing middle class and the increased need for electricity in rural and isolated areas are two major factors driving the use of air-cooled generators. Moreover, the market's growth in Asia-Pacific is also being aided by government programs to increase power availability and dependability in underserved areas.

Key players in the market

Some of the key players in Air-Cooled Generators market include Caterpillar Inc., Yamaha Motor Co., Ltd, Doosan Corporation, Generac Power Systems, Inc., Briggs & Stratton Corporation, Honda Motor Co. Ltd., Cummins Inc., GE Vernova, Baker Hughes Company, Ingersoll Rand Inc., Yanmar Co., Ltd., Mitsubishi Heavy Industries, Ltd., Siemens Energy, Toshiba Corporation and Kohler Co.

Key Developments:

In August 2024, Yamaha and Honda have joined forces to advance the electric motorcycle market in Japan by agreeing on the supply of electric models in the Class-1 category. This partnership, built on years of collaboration, aims to address challenges such as range and charging time.

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In January 2024, Caterpillar Inc. announced it has signed an electrification strategic agreement with CRH to advance the deployment of Caterpillar's zero-exhaust emissions solutions. CRH is the number one aggregates producer in North America and the first company in that industry to sign such an agreement with Caterpillar.

In December 2023, Cummins Inc has reached an agreement in principle to resolve U.S. regulatory claims regarding its emissions certification and compliance process for certain engines primarily used in pick-up truck applications. The company has cooperated fully with the relevant regulators, already addressed many of the issues involved, and looks forward to obtaining certainty as it concludes this lengthy matter.

Products Covered:

- Diesel Generators
- Gas Generators
- Hybrid Generators

Types Covered:

- Portable
- Stationary

Power Outputs Covered:

- Less than 100 kW
- 100-200 kW
- More than 200 kW

Systems Covered:

- Enclosed System

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Open Ventilated System

End Users Covered:

Industrial

Residential

Commercial

Telecom

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

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- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa
- Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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