

# **Diesel Gensets Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Power Rating (Below 75 kVA, 75-375 kVA, 375-750 kVA and Above 750 kVA), By Portability (Stationary and Portable), By Application (Continuous Load, Peak Load and Standby Load), By End User (Residential, Commercial and Industrial), By Region, By Competition Forecast & Opportunities, 2018-2028**

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## **Abstracts**

The Global Diesel Gensets Market was valued at USD 11.94 billion in 2022 and is growing at a CAGR of 5.09% during the forecast period. Global Energy demand surpasses the available supply, driven by factors like ongoing population growth, infrastructure development, and rapid industrialization in emerging economies. Diesel generators offer several advantages, including low operating costs and improved fuel efficiency, making them particularly popular in developing regions, especially in the Asia Pacific region.

### **Key Market Drivers**

#### **Increasing Power Demand in Developing Regions**

One of the key drivers of the global diesel gensets market is the increasing demand for reliable power sources in developing regions. As economies in Asia, Africa, and Latin America continue to grow, there is a corresponding need for electricity to support industrialization, urbanization, and overall economic development. Unfortunately, many of these regions still face challenges in establishing stable and consistent electrical

grids. This lack of power infrastructure has resulted in a significant reliance on backup generators, including diesel gensets.

In these areas, where power outages and voltage fluctuations are prevalent, diesel gensets provide a dependable source of electricity. Their ability to deliver continuous power, even in remote locations, makes them indispensable for various applications, ranging from powering hospitals and data centers to supporting construction sites and agricultural operations. The increasing frequency and severity of extreme weather events also contribute to the demand for backup power, as diesel gensets can play a crucial role during natural disasters.

Furthermore, diesel gensets are often preferred in these regions due to their robustness and longevity. They can withstand harsh operating conditions, require less maintenance compared to some alternative power sources, and have a relatively long lifespan. Consequently, the growing power demand in developing regions, coupled with the need for reliable backup power, serves as a significant driver propelling the expansion of the global diesel gensets market.

#### Expanding Telecom and Data Center Infrastructure

The proliferation of information technology and the rapid growth of data-driven services have generated a significant demand for uninterrupted power supply, driving the global diesel gensets market. Telecom networks and data centers, which serve as the backbone of modern communication and cloud-based services, necessitate consistent power to sustain operations. Even a momentary power disruption can result in substantial financial losses and service disruptions.

To mitigate such risks, telecom companies and data center operators heavily rely on diesel gensets as part of their backup power infrastructure. These gensets ensure an immediate and seamless transition to backup power when the main grid fails, guaranteeing uninterrupted connectivity and data access. With the continuous expansion of 5G networks, the deployment of edge computing facilities, and the growth of cloud services, the demand for reliable backup power solutions, including diesel gensets, is projected to remain robust.

Moreover, environmental regulations and sustainability concerns have stimulated the development of more fuel-efficient and eco-friendlier diesel gensets. Modern diesel gensets are engineered to minimize emissions and noise pollution, aligning with the environmental objectives of numerous data center operators and telecom companies.

## Growth in the Construction and Mining Industries

The global construction and mining industries play a pivotal role in driving the demand for diesel gensets. These sectors often operate in remote or off-grid locations where access to a stable power supply is limited. As construction and mining activities expand, the need for onsite power generation becomes increasingly crucial.

Diesel gensets are the preferred choice in these industries due to their portability, ease of installation, and robust power output. They can support a wide range of equipment, from heavy machinery to temporary housing and office facilities. The construction industry relies on gensets to power tools and equipment, while the mining sector uses them for drills, pumps, and ventilation systems.

Furthermore, the adoption of diesel gensets is driven by their ability to withstand challenging environmental conditions, such as extreme temperatures and high altitudes. These machines are designed to provide reliable power in rugged environments where other power sources may struggle to perform consistently.

In conclusion, the global diesel gensets market is experiencing significant growth due to increasing power demand in developing regions, expanding telecom and data center infrastructure, and the growth of the construction and mining industries. These drivers underscore the versatility and reliability of diesel gensets in meeting the diverse power needs of various sectors and regions worldwide.

## Key Market Challenges

### Environmental Concerns and Emissions Regulations

One of the primary challenges confronting the global diesel gensets market is the mounting concern regarding environmental impact and increasingly stringent emissions regulations. Diesel generators are known to emit pollutants such as nitrogen oxides (NO<sub>x</sub>), particulate matter (PM), and carbon dioxide (CO<sub>2</sub>) during the combustion of diesel fuel. These emissions contribute to air pollution and are linked to various health risks, presenting a significant environmental concern.

Governments and regulatory bodies worldwide are imposing more rigorous emissions standards and regulations on diesel-powered equipment, including gensets. These regulations aim to mitigate the adverse environmental effects associated with diesel

engines. Achieving compliance with these standards often necessitates costly modifications to gensets, including the integration of exhaust aftertreatment systems, which can elevate the overall cost of ownership.

Furthermore, the negative perception of diesel gensets attributed to their environmental impact can dissuade potential customers from adopting this technology. As sustainability assumes greater prominence in decision-making processes, the diesel gensets market faces the challenge of enhancing its environmental profile and ensuring adherence to evolving emissions regulations.

### Competition from Alternative Power Sources

The global diesel gensets market encounters intense competition from alternative power sources, particularly renewable energy technologies and energy storage solutions. The growing awareness of climate change and the desire to reduce carbon footprints have prompted numerous businesses and industries to explore cleaner and more sustainable energy options.

Renewable energy sources like solar, wind, and hydropower are gaining momentum as viable substitutes for diesel gensets. These sources offer the advantage of generating electricity with minimal or no emissions, and they can often prove more cost-effective in the long run, particularly in regions with favorable natural conditions.

Moreover, energy storage technologies such as lithium-ion batteries are also witnessing increasing popularity for backup power applications. They provide quick response times and can be charged using renewable energy sources, rendering them an environmentally friendly alternative to diesel gensets.

As these cleaner and more sustainable options continue to advance in terms of efficiency and affordability, the diesel gensets market faces the challenge of maintaining its market share and relevance in a rapidly evolving energy landscape. To overcome this challenge, diesel genset manufacturers must innovate and adapt by offering more efficient and environmentally friendly solutions.

### Fluctuating Fuel Prices and Supply Chain Disruptions

The diesel gensets market is sensitive to changes in fuel prices and disruptions in the global supply chain. Diesel fuel constitutes a significant operational cost for genset users, and its price can be volatile due to various factors, including geopolitical tensions,

supply and demand dynamics, and economic conditions.

Elevated diesel fuel prices can result in increased operating expenses for genset owners, making the utilization of these backup power sources less economically appealing. Furthermore, supply chain disruptions caused by geopolitical conflicts or natural disasters can lead to fuel shortages, impacting the availability and reliability of diesel gensets.

To address these challenges, genset users may explore alternative fuels or hybrid systems that reduce their reliance on diesel fuel. Additionally, manufacturers should strive to enhance the fuel efficiency of gensets and explore alternative fuel options to mitigate the impact of fuel price fluctuations.

In conclusion, the global diesel gensets market faces challenges associated with environmental concerns and emissions regulations, competition from alternative power sources, and the effects of fluctuating fuel prices and supply chain disruptions. Overcoming these challenges necessitates innovation, adaptation, and a continued emphasis on sustainability to ensure the ongoing relevance and competitiveness of diesel gensets in the evolving energy landscape.

## Key Market Trends

### Increasing Demand for Hybrid and Dual-Fuel Diesel Gensets

A prominent trend observed in the global diesel gensets market is the increasing demand for hybrid and dual-fuel gensets. Hybrid gensets incorporate diesel engines with energy storage systems, such as lithium-ion batteries, to offer efficient and flexible power solutions. These systems seamlessly switch between diesel and stored electrical power, optimizing fuel consumption and reducing emissions.

This trend is driven by the growing emphasis on sustainability and environmental responsibility. Hybrid gensets provide significant reductions in fuel consumption and greenhouse gas emissions compared to traditional diesel-only gensets. They are particularly suitable for applications with intermittent or variable power loads, such as renewable energy integration and remote off-grid sites.

Dual-fuel gensets, capable of operating on both diesel and natural gas, are also gaining popularity due to their fuel flexibility. Natural gas, being more economical and environmentally friendly, has lower emissions compared to diesel fuel. Consequently,

industries are increasingly adopting dual-fuel gensets to cut operating costs and minimize their carbon footprint. This trend signifies a broader industry shift towards cleaner and more sustainable power generation technologies.

### Adoption of Advanced Digital Controls and Remote Monitoring

A notable trend in the global diesel gensets market is the extensive adoption of advanced digital controls and remote monitoring solutions. These technologies empower genset operators to optimize performance, enhance reliability, and lower maintenance costs.

Digital controls, often integrated into modern genset systems, provide precise monitoring and control of engine parameters, load balancing, and fuel management. This facilitates more efficient operation, improved fuel economy, and reduced emissions. Moreover, advanced control systems can automatically start and stop gensets in response to load fluctuations, ensuring timely power availability while minimizing idle time.

Remote monitoring and telemetry solutions have also gained popularity. These systems enable real-time monitoring of genset performance, fuel levels, and maintenance requirements from a centralized location. This not only enhances genset reliability but also allows for proactive maintenance, reducing downtime and repair costs. Additionally, remote monitoring enables predictive maintenance, enabling the detection and resolution of potential issues before they result in equipment failure.

The adoption of digital controls and remote monitoring is driven by the pursuit of greater operational efficiency, reduced downtime, and cost savings in genset operation and maintenance.

### Segmental Insights

#### Application Insights

The Peak Load segment holds a significant market share in the Global Diesel Gensets Market. Developing regions, particularly in Asia, Africa, and Latin America, are currently witnessing rapid urbanization and industrialization. These areas have a significant demand for peak load gensets due to insufficient power infrastructure and frequent power outages. Genset manufacturers are incorporating advanced digital controls and remote monitoring systems into peak load gensets, enabling operators to monitor

performance in real-time, proactively schedule maintenance, and optimize genset operation during peak load events.

Peak load gensets are often customized to cater to the specific requirements of industries such as manufacturing, healthcare, data centers, and telecommunications. Manufacturers can capitalize on opportunities by offering specialized genset solutions tailored for these sectors. In conclusion, the growth of the global diesel gensets market's peak load segment is driven by the escalating need for reliable backup power during periods of high electricity consumption. Manufacturers have the potential to enhance efficiency, embrace hybrid solutions, and provide customization to meet specific industry needs.

### End User Insights

The Industrial segment holds a significant market share in the Global Diesel Gensets Market. In regions with unreliable grid infrastructure or frequent power outages, industrial facilities heavily rely on gensets to ensure uninterrupted production and avoid costly downtime. The industrial sector is witnessing a growing adoption of hybrid gensets, which combine diesel engines with energy storage solutions. These systems offer efficient power management, reduced fuel consumption, and increased flexibility to meet varying power demands.

Digitalization and IoT technologies play a crucial role in enabling real-time monitoring and predictive maintenance for industrial gensets. These features help minimize downtime, optimize maintenance schedules, and enhance overall reliability.

To summarize, the industrial segment of the global diesel gensets market is driven by the imperative need for reliable backup power across various industries. Manufacturers can leverage trends such as efficiency improvements, customization, and the adoption of hybrid systems to capitalize on this demand.

### Regional Insights

The Asia Pacific region is expected to dominate the market during the forecast period. The Asia-Pacific region is currently undergoing significant urbanization and industrialization, resulting in a growing demand for reliable and uninterrupted power supply. In commercial and industrial sectors, diesel gensets are widely used as backup power sources, and these sectors are experiencing rapid expansion in the region.

There is a rising demand for hybrid gensets in the Asia-Pacific region, which combine diesel engines with energy storage systems. This shift is driven by a growing emphasis on sustainability and the necessity for efficient and flexible power solutions, particularly in areas prone to power outages. Many rural and remote parts of Asia-Pacific lack access to a stable electrical grid, making diesel gensets crucial for providing power in such regions. This creates opportunities for manufacturers to customize genset solutions to meet specific needs.

Asia-Pacific has emerged as a manufacturing hub for diesel gensets, with key manufacturers based in countries like China and India. These manufacturers often export their products to global markets, contributing to the region's overall competitiveness in the global market. As concerns about air quality and emissions continue to rise, several countries in Asia-Pacific are implementing stricter emissions regulations. This presents an opportunity for manufacturers to invest in cleaner and more efficient diesel genset technologies, including low-emission engines and exhaust aftertreatment systems.

### Key Market Players

Atlas Copco AB

Caterpillar Inc.

Cummins Inc.

Doosan Corp.

Generac Holdings Inc.

Kirloskar Oil Engines Ltd

Kohler Co.

Wartsila Corporation

Mitsubishi Heavy Industries Ltd

Rolls-Royce Holding PLC



## Report Scope:

In this report, the Global Diesel Gensets Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Global Diesel Gensets Market, By Power Rating:

Below 75 kVA

75-375 kVA

375-750 kVA

Above 750 kVA

### Global Diesel Gensets Market, By Portability:

Stationary

Portable

### Global Diesel Gensets Market, By Application:

Continuous Load

Peak Load

Standby Load

### Global Diesel Gensets Market, By End User:

Residential

Commercial

Industrial

### Global Diesel Gensets Market, By Region:

## North America

United States

Canada

Mexico

## Europe

France

United Kingdom

Italy

Germany

Spain

## Asia-Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Diesel Gensets Market.

Available Customizations:

Global Diesel Gensets Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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