

Power Rental Market by Fuel Type (Diesel, Natural Gas), Equipment (Generators, Transformers, Load Banks), Power rating (Up to 50 kW, 51- 500 kW, 501-2000 kW, Above 2500 kW), Application, End User and Region - Global Forecast to 2029

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Report description:

The global power rental market is forecast to reach USD 14.2 billion by 2029 from an estimated USD 10.8 billion in 2024, at a CAGR of 5.6% during the forecast period (2024-2029). The events and entertainment industry's continuous growth necessitates reliable power sources for concerts, festivals, and corporate events, driving the need for rental power services.

"Other fuel type: The second fastest segment of the power rental market, by fuel type."

Based on fuel type, the power rental market has been split into three types: diesel, natural gas, and other fuel type. Other fuel types are majorly comprised of hybrid & HFO, which is expected to be the second fastest segment in the market. Hybrid & HFO uses a low amount of non-renewable fossil fuels and burns with lower emissions and less waste. This makes it an environmentally friendly option compared with regular diesel engines. Hybrid & HFO sets are expected to replace diesel standby, or backup generator sets in the developed countries of Asia Pacific with a well-established gas distribution network. All these factors are driving the market for other fuel types.

"Load bank segment is expected to emerge as the second-largest segment based on equipment."

Based on equipment, the power rental market has been segmented into generators, transformers, load bank, and fuel tank & wires. Since load banks offer vital testing and maintenance services for power generation equipment, load banks are a major factor in the growth of the power rental sector. Load banks are tools that replicate electrical loads and apply them to generators so that users can test the equipment's functionality, capacity, and efficiency in different scenarios. This testing is essential for verifying the reliability and readiness of generators before deployment in critical applications such as backup power or temporary power solutions.

"Asia Pacific is expected to be the second largest region in the power rental market."

Asia Pacific is expected to be the second largest region in the power rental markets between 2024-2029. The market in Asia

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Pacific includes China, India, Australia, Japan, South Korea, Bangladesh, Rest of Asia Pacific countries. The growing focus on disaster preparedness and resilience, particularly in the Asia Pacific region, which is prone to natural disasters such as typhoons, earthquakes, and floods, drives the demand for backup power solutions, boosting the power rental market. Moreover, deals and contracts done by the companies operating in the Asia Pacific power rental market would further drive the market in the region. For instance, Caterpillar signed a five-year contract for international power rental projects with APAC Energy Rentals, a Singapore-based power rental company.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 45.2%, Tier 2- 32.7%, and Tier 3- 22.1%

By Designation: C-Level- 43.0%, Director Levels- 38.0%, and Others- 19.0%

By Region: North America- 40.1%, Europe- 22.1%, Asia Pacific- 33.8%, the Middle East & Africa- 3.0%, and South America- 1.0%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: < USD 500 million

The power rental market is dominated by a few major players that have a wide regional presence. The leading players in the power rental market are Aggerko (UK), Ashtead Group plc (UK), United Rentals, Inc. (US), Caterpillar (US), Cummins Inc (US).

Research Coverage:

The report defines, describes, and forecasts the global power rental market, by fuel type, by equipment, by power rating, by application, by rental type, by end user and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value, and future trends in the power rental market.

Key Benefits of Buying the Report

- Rapid industrialization in emerging economies across the world, surging demand for uninterrupted and reliable power supply, and increasing demand for electrification and uninterrupted power supply in emerging countries to drive the demand. Factors such as stringent government regulations associated with generators would hinder market growth. Integration of power rental equipment with renewable energy sources to offer lucrative opportunities in this market. Rising operating expenditure of diesel generators due to high fuel prices and fluctuations in raw material and components are major challenges faced by countries in this market.

- Product Development/ Innovation: Trends such as the integration of renewable energies play a pivotal trend in the development of power rental market. Moreover, generators are undergoing a series of technological advances that make them unique compared to the conventional diesel generators in use. Technologies such as direct power installation technology, power management systems, asset performance management systems are among the key technologies that would be driving the power rental market during the forecast period.

- Market Development: Collaboration with equipment manufacturers, technology providers, and energy service companies would facilitate market development by leveraging complementary capabilities, resources, and expertise. Strategic partnerships and acquisitions enable companies to expand their product portfolios, enter new market segments, and enhance their competitive position in the market.

- Market Diversification: Aggreko boosted its investments in hydrogen technology with the first hydrogen power generation units pilot project at the Aggreko depot in Moerdijk, Netherlands for use in temporary power applications. The company has ten 50 kVA hydrogen combustion gensets ready for customer installations in Europe.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Aggerko (UK), Ashtead Group plc (UK), United Rentals, Inc. (US), Caterpillar (US), Cummins Inc (US) among others in the power rental market.

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