

## **Emergency Power Generators - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Emergency Power Generators Market size is estimated at USD 28.22 billion in 2025, and is expected to reach USD 36.10 billion by 2030, at a CAGR of 5.05% during the forecast period (2025-2030).

#### Key Highlights

- In the medium term, increasing demand from the healthcare and construction sectors is likely to drive the market in the upcoming years.
- However, increasing investment in distributed renewable energy generation technology is expected to negatively impact the market study.
- Recent advancements in generator technology have focused on reducing noise, controlling emissions, and boosting power output and efficiency. Furthermore, there's an increasing focus on dual-fuel gensets that can operate on both natural gas and diesel. These technological strides in generators are anticipated to bolster market growth in the coming years.
- Asia-Pacific is set to lead the market during the forecast period, fueled by surging demand in nations like China and India.

#### Emergency Power Generators Market Trends

##### Below 75 kVA is Likely to Witness Significant Growth

- Emergency power generators with a capacity below 75 kVA are compact, versatile machines designed to provide reliable backup power for residential, small commercial, and light industrial applications. These generators are ideal for smaller-scale

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operations where the power demand is moderate, offering an efficient solution for keeping essential systems running during power outages.

- Aging power infrastructure, extreme weather events, and escalating electricity demand are causing more frequent outages in both developed and developing regions. Consequently, both residential users and small businesses are increasingly relying on generators under 75 kVA. This shift ensures they can maintain power during disruptions, safeguarding essential services like refrigeration, heating, lighting, and communication.
- As the global population grows, so does the demand for electricity. Between 2021 and 2023, global electricity consumption rose from 28,169 TWh to 29,470 TWh. Regions like Asia-Pacific, Africa, and Latin America, witnessing rapid urbanization and electrification, are seeing a heightened demand for backup power solutions. Many urban and rural areas in these regions grapple with unreliable grid access, amplifying the need for compact, cost-effective generators to ensure consistent power for homes and small businesses.
- In December 2023, Ulsan, a key industrial hub in the southeast, suffered a notable power outage. Around 155,000 households were left in the dark for about two hours due to a malfunctioning substation. This incident stands out as South Korea's most significant power outage since 2017, when a blackout impacted roughly 200,000 households in the greater Seoul area. Such events underscore the growing need for emergency power backup generators.
- Globally, there's been a significant uptick in residential projects. This trend is set to drive the demand for backup generators in the near future. For example, in July 2024, Turkish construction firm Karmod plans to launch new housing projects in Congo, Gambia, and Tanzania. The acceleration of these housing projects is anticipated to heighten the demand for emergency backup generators to power construction equipment in the coming years.
- In summary, the increasing power demand leading to outages, coupled with a rise in residential construction projects, is poised to benefit the generator segment in the coming years.

#### Asia Pacific to Dominate the Market

- China's rapid industrialization and urban growth have strained its power grid, leading to more frequent power outages. These outages have caused significant inconvenience and economic repercussions. In response, the demand for backup power generators has surged.
- Various factors shape China's backup power generator market. As the world's manufacturing hub, China's industrial sector stands out as a primary consumer. Backup generators are essential for commercial buildings, factories, telecommunication towers, and data centers to maintain a consistent power supply.
- Government policies play a pivotal role in China's backup power generator market. China's swift urbanization and industrial expansion have driven up electricity demands. In response, the government has heavily invested in infrastructure, especially power grids. Yet, these grids, particularly in rural regions and during peak times, often struggle, ensuring a continuous demand for backup generators.
- Meanwhile, India's booming economy and infrastructure growth are outpacing its power generation capacity. This imbalance has led to frequent power outages, especially in rural and suburban regions.
- India's backup power generator market is witnessing growth, fueled by several factors. A primary driver is the increase in power cuts, stemming from demand outstripping supply. A significant incident occurred in June 2024, when an overload caused both the northern and eastern grids to collapse, leaving 620 million people in darkness for 13 hours.
- A survey from May 2023 highlighted the power challenges in India: 57% of households experienced daily outages of up to two hours, and 37% faced interruptions lasting two to four hours. With rising temperatures across the nation, the risk of intensified power outages becomes more pronounced. As a result, both individuals and businesses are increasingly relying on backup power generators to shield against these potential disruptions.
- In summary, as power demand surges across various sectors in both countries, the demand for emergency power generators is poised to rise in the coming years.

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## Emergency Power Generators Industry Overview

The emergency power generators market is fragmented. Some of the major players operating in the market (in no particular order) include Caterpillar Inc, Atlas Copco AB, Cummins Inc, Kohler Company, and American Honda Motor Co., Inc., among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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