

Data Center Generator - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Data Center Generator Market Report

The data center generator market by revenue is expected to grow at a CAGR of 4% during the period 2021–2026.

The global market is expected to grow on account of increased unplanned power outages. A percentage (25%) of power outages in data centers is due to human errors such as flawed installation and commissioning services and lack of regular maintenance of adopted infrastructure. Vendors are constantly innovating their service offerings that enable decrease power outages. Hyperscale operators are also using artificial intelligence (AI) to decrease power consumption and avoid outages. In June 2020, the New South Wales government's data center faced a power outage, which affected the health and state customer services significantly. Similarly, in August 2020, there was a major power outage in Equinix's LD8 data center in London, UK, which severely affected customers' network services.

The following factors are likely to contribute to the growth of the data center generator market during the forecast period:

Introduction of Automation & Remote Monitoring Generators Solutions

Increase in Construction of Hyperscale Data Centers

Adoption of Modular Data Centers & Gensets

Increase in Power Outages

The study considers the present scenario of the data center generator market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Data Center Generator Market Segmentation

The global data center generator market research report includes a detailed segmentation by generator capacities, systems, tier standards, geography. Data center facilities in North America are adopting N+1 redundant configuration generators with onsite fuel storage capacity to provide over 48 hours of runtime. The adoption of devices with a power capacity of >2 MW is common. In Western Europe, data center providers are procuring multiple generators with onsite fuel storage. The majority of the UK facilities are adopting systems with N+1 redundant configuration, with a few installing 2N redundant. With the increasing adoption of 2 MW diesel systems, the UK generator market is growing. In the Nordic region, renewable energy availability with strong grid stability has not influenced the market yet, as data center operators are continuously constructing Tier III facilities with N+1 or N redundant configuration. The data center generator market is witnessing the adoption of devices with over 2 MW power capacity.

The availability of gas and bi-fuel generators is growing among service providers. Gas generators can be installed along with the electricity grid supply to reduce data centers' electricity consumption. Data centers near natural gas resources install gas systems as they are a sustainable and cost-effective alternative to diesel generators. However, they have higher maintenance costs than diesel ones. Diesel generators have been in use for decades. However, the adoption of natural gas systems is witnessing steady growth in the market, especially in Japan. This trend is likely to continue during the forecast period due to regulations limiting the facility's use of multiple diesel systems. Data centers developed in Japan are majorly powered through generators running on natural gas. The adoption of natural gas or bi-fuel generators by hyperscale providers will significantly impact the data center generator market share, thereby leading to a sustainable environment.

The Uptime Institute has classified and evaluated data center facilities into tiers – I & II,

III, and IV based on infrastructural performance, efficiency, redundancy, and high availability. Tier II data centers have minimum redundancy, where it is identified among UPS and PDU systems. However, the installation of generators follows N redundant configuration. A few small-scale colocation facilities of Tier II standards are likely to operate with N+1 redundancy in generators. In 2020, over 320 data center projects were opened and under construction, falling under the Tier III category. This trend is likely to continue during the forecast period. Most new data centers are designed to be of Tier III standards with a minimum of N+1 redundancy in generators and can be reconfigured up to 2N redundancy as and when the need arises.

The construction of facilities with over 10 MW of power capacity in North America is likely to increase generators' adoption with N+N redundant configuration. Diesel systems are the most adopted ones in the region with onsite fuel storage. North America witnessed the development and expansion of over 150 data center facilities in 2020. The US was the major contributor to data center projects. Besides, over 40 data centers have been announced/under construction in the region. There is also increased investment in the construction of hyperscale facilities with over 20 MW of power capacity. There are currently over 50 hyperscale data centers built in North America in 2020 that operate at over 20 MW's power capacity. Power consumption and carbon emission are the major challenges faced by the market. Also, several innovations that aim to enhance operational efficiency, reduce power consumption, and decrease carbon emissions have been adopted in the market.

By Geography

North America

US

Canada

Latin America

Brazil

Other Latin American Countries

Western Europe

UK

Germany

France

Netherlands

Ireland

Other Western European Countries

Nordic Countries

Denmark

Iceland & Finland

Norway

Sweden

Central & Eastern Europe

Russia & Czech Republic

Poland & Austria

Other Central and Eastern European Countries

Middle East

GCC

Other Middle Eastern Countries

Africa

South Africa

Kenya

Other African Countries

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asia

Singapore

Malaysia

Thailand

Indonesia

Other South Eastern Countries

INSIGHTS BY VENDORS

Caterpillar, Cummins, Generac, MTU, Mitsubishi, and Kohler hold a significant percentage of the global data center generator market share for diesel systems. Strong relationships with engine manufacturers are critical for generator providers. The data center generator market comprises multiple pure-play vendors offering diesel, gas, and DRUPS systems. Although the adoption of DRUPS systems across the globe has been growing in recent years, the market has been affected due to the COVID-19 pandemic outbreak. The commencement of new construction projects has delayed by a quarter,

affecting several vendors' revenue in the market in Q1 and Q2 2020.

Key Company Vendors

Caterpillar

Cummins

Generac Power Systems

HITEC Power Protection

KOHLER-SDMO

Rolls Royce Power Systems AG

Yanmar Holdings (HIMOINSA)

Other Prominent Vendors

Aggreko

Ausonia

Atlas Copco

Detroit Diesel

DEUTZ

Guangzhou Weineng Electromechanical

HITZINGER

Inmesol

INNIO

KOEL (Kirloskar Group)

ONIS VISA

Perkins

Piller Power Systems

Pramac

KEY QUESTIONS ANSWERED

1. What is the global data center generator market size and growth rate?
2. What are the key drivers and trends driving the data center generator market?
3. Who are the leading players in the data center generator market?
4. What benefits automation and monitoring solutions offer in generator operations?
5. What is the growth of the North American data center generator market share during the forecast period?

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