

# Data Center Generator Market - Industry Analysis by Generator Capacity, By Systems, By Tier Standards, By Geography

The global data center generator market is estimated to reach revenues of around \$5 billion by 2023, growing at a CAGR of more than 5% during 2017-2023

CHICAGO, IL, UNITED STATES, January 8, 2019 /EINPresswire.com/ -- Arizton's market report offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market research report on [global data center generator market](#) offers market share analysis in terms of power capacity (MW) during the forecast period. The market study also includes insights on segmentation by generator capacity (<1 MW, 1MW – 2MW, and >2MW), by systems (diesel generators and DRUPS systems), by tier standards (Tier I & II, Tier III, and Tier IV), and by geography (APAC, Americas, and EMEA).

The installation of generators with intelligent control systems with real-time monitoring software that can predict maintenance requirements, component failures, and automatic switchovers for uninterrupted operations is driving the global market. The increasing mega data center construction facilities with higher power capacities will lead to the adoption of high-capacity systems in the market. The global data center generator market is driven by the presence of leading vendors such as MTU, Kohler (SDMO), Euro-Diesel, General Power Systems, and Himoina offering innovative systems. The growing concerns about carbon emissions are leading to the launch of eco-friendly generators such as natural generators and bi-fuel generators in the global market. The market research report provides in-depth market analysis and segmental analysis of the global data center generator market by generator capacity, systems, tier standards, and geography.

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Caterpillar, Cummins, Euro-Diesel, Generac Power System, Hitec Power Protection, KOHLER (SDMO), Rolls Royce Power, Systems AG (MTU On Site Energy), Yanmar Group (HIMOINSA) are the leading players.”

*Harry, Sr Consultant*

The report considers the present scenario of the global data center generator market and its market dynamics for

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## GLOBAL DATA CENTER GENERATOR MARKET

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<h3 style="color: blue; text-align: center;">MARKET SIZE BY REVENUE 2023</h3> <p style="text-align: center; color: blue; font-weight: bold;">~ \$5 BILLION CAGR ~ 5%</p>	<h3 style="color: blue; text-align: center;">COMPETITIVE LANDSCAPE</h3> <div style="text-align: center;"> </div> <ul style="list-style-type: none"> <li>Market Overview</li> <li>Key Company Profiles</li> </ul> <p style="text-align: center; font-weight: bold; font-size: small;">8 Leading Vendors Identified</p> <p style="text-align: center; font-weight: bold; font-size: small;">12 Prominent Players Operating in the Market</p>

Global Data Center Generator Market Analysis and Overview

the period 2018–2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the market.

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## Data Center Generator Market– Dynamics

Modular data center development comprising containerized and performance optimized data center (POD) facilities are being offered by multiple market vendors on a standalone basis or in partnership with other providers. Modular data center development is especially being used among organizations with a stringent budget. Modular deployment with less than 10 racks is being carried out by providers in developing countries such as Latin America, Eastern Europe, Southeast Asia, and the Middle East and Africa. Data center automation identifies the maintenance requirements of power infrastructure to avoid operational failure. For example, generators are monitored for maintenance to avoid backup power failure during outages. The reduction in power consumption and wastage in modern data centers is achieved through end-to-end monitoring and automation of facilities. Most of the modern power infrastructure is supplied along with controls for direct and remote monitoring of facilities. Most of the power infrastructure vendors are heavily investing in software solutions that monitor the power infrastructures such as Schneider Electric’s StruxureWare, Vertiv’s Trellis, and ABB’s Ability automation platforms. DRUPS is popular because of its a flywheel or battery-powered UPS along with a diesel generator. DRUPS is still witnessing low adoption as compared to traditional UPS systems and generators. However, its adoption is expected to grow throughout the forecast period, especially among data centers that use traditional UPS systems and thereby incur high operational costs. Some of the recent deployments of DRUPS was by Singtel in Singapore and NextDC in Australia.

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## Data Center Generator Market– Segmentation

This market research report includes a detailed segmentation of the market by generator capacity, systems, tier standards, and geography. The global data center generator market by generator capacity is classified into <1 MW, 1MW – 2MW, and >2MW. >2MW dominated more than half of the total market share in 2017, growing at a CAGR of around 6% during the forecast period. The multiple installations of 2.25 MW and 2.5 MW capacity generators identified across the globe in 2017 are driving the growth of this segment in the global market. The increasing deployment of mega facilities by hyperscale facilities operators is contributing to the growing revenues in this market segment. The market vendors are currently offering multiple generator



sets with a capacity of <1 MW. However, the use of these systems is highly dependent on the power consumed by data centers. Similar to UPS systems, generators with a power capacity of <1 MW are mostly adopted in modular data center deployments.

The systems segment in the global data center generator market is divided into generators and DRUPS systems. DRUPS systems are the fastest growing segment in the global market, at a CAGR of approximately 7% during the forecast period. The increasing use of DRUPS systems eliminates the use of separate UPS and generator systems and increases the overall efficiency of the facilities by 96% in the global market. These systems use flywheel UPS technology overcoming the issues incurred for using VRLA batteries in UPS systems in the market. Data center operators are highly reliable on diesel generator to provide backup power or to adopt as stand-by power sources. However, the use of these generators in highly populated areas is becoming costly and a non-sustainable solution. In addition, space taken by diesel generator was also high. Continuous innovations by vendors have brought the availability of modular systems that reduce the installation space by up to 20%.

The global data center generator market by tier standards is segmented into Tier I & II, Tier III, and Tier IV. Tier III segment occupied the largest market share in 2017, growing at a CAGR of around 5% during the forecast period. The new facilities of Tier III standards are designed with a minimum of N+1 redundancy and can be reconfigured with up to 2N+1 redundancy. The changes in the redundancy are done as per consumer requirements and allow flexibility in designs in the global market. The 80% occupancy rate of facilities with Tier III standards will encourage operators to invest in these designs in the market over the next few years. Tier IV data centers are also being developed as modular facilities like Switch's data center in Nevada. These facilities generate more revenue for the market, with focused investment on highly efficient and scalable generator systems. There are few Tier IV facilities operated by providers such as Facebook are involved in installation of fewer gensets.

#### Market Segmentation by Generator Capacity

- <1 MW
- 1MW – 2MW
- >2MW

#### Market Segmentation by Systems

- Diesel Generators
- DRUPS Systems

#### Market Segmentation by Tier Standards

- Tier I & II
- Tier III
- Tier IV

#### Data Center Generator Market- Geography

The geographical segment in the global data center generator market is divided into APAC, Americas, and EMEA. The APAC is the fastest growing region in the global market, at a CAGR of more than 8% during the forecast period. The increasing investments by international and regional facility operators and the growing adoption of public cloud and hybrid cloud services are the major factors attributing to the growth of the APAC region in the global market. AWS, Microsoft, Google, Baidu, Alibaba, and Apple are the largest investors in the APAC market. In Western Europe, the investment is higher in the UK, Germany, Ireland, France, and the Netherlands. In the Nordic region, most of the investment is identified in Denmark and Sweden. The data center market in Western Europe witnessed significant investments in 2017, with multiple projects carried out by colocation, cloud, telecommunication, and internet service providers in the UK, Germany, France, Ireland, Spain, Italy, Netherlands, Switzerland, Portugal, and Austria.

## Market Segmentation by Geography

- Americas
  - o US
  - o Canada
  - o Latin America
- EMEA
  - o Western Europe
  - o Nordic
  - o Eastern Europe
  - o Middle East & Africa
- APAC
  - o China & Hong Kong
  - o Singapore
  - o Australia
  - o Rest of APAC

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## Key Vendor Analysis

The global data center generator market is witnessing intense competition due to the presence of multiple pure-play vendors offering diesel, gas and DRUPS systems with a capacity of up to 3.5 MW. The leading players are offering their engines to build a strong consumer base in the global market. The companies are selling their systems through local resellers and diverse distribution networks to gain a larger market share. The vendors are focusing on efficiency, cost, and emission certifications to sustain the competition in the market. The players are offering high capacity engines to increase their profitability in the global data center generator market.

The major vendors in the global data center generator market are:

- Caterpillar
- Cummins
- Euro-Diesel
- Generac Power System
- Hitec Power Protection
- KOHLER (SDMO)
- Rolls Royce Power Systems AG (MTU On Site Energy)
- Yanmar Group (HIMOINSA)

Other prominent vendors in the global data center generator market include Aggreko, Atlas Copco, DEUTZ, Hitzinger, Inmesol, Innio, KOEL (Kirloskar Group), Mitsubishi, Perkins, The Piller Group, Onis Visa, and Pramac.

Key market insights include

1. The analysis of the global data center generator market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights into current industry trends, trend forecast, and growth drivers about the global data center generator market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of the global data center generator market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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