

Data Center Generator Market - Global Outlook & Forecast 2023-2028

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Report description:

The global data center generator market is expected to grow at a CAGR of 6.24% during 2022-2028.

KEY HIGHLIGHTS

- The growing number of data center construction has prompted investors to install energy-efficient power infrastructure. Operators have been investing in innovative solutions such as generators powered by hydrotreated vegetable oil, natural gas, hydrogen fuel cells, eco-diesel generator sets, and others.
- The growing deployment of 5G services is growing the demand for edge data center deployments across several countries. Hence, it is increasing the adoption of power infrastructure in those edge facilities.
- As data center investors make climate goals, sustainability is gaining importance across all regions. The sustainability initiatives will drive the adoption of HVO fuel and fuel cell generators in the data center generator market, which are sustainable generators with carbon-free emissions.
- Regions like the Americas and Europe witnessed the adoption of innovative generator facilities like HVO fuel. Data centers colocation providers like Equinix and Digital Realty are moving towards adopting HVO fuel in their data center facilities.
- As part of the sustainability initiatives, the Nordic region is witnessing a decline in the use of generators by operators for meeting climatic goals. A strong power grid in the region makes it less dependent on generators.
- The rise in power outages and the conflicts in the regions affect the power infrastructure in different regions, which drives the demand for generators in the data center facilities.

MARKET TRENDS

Rise in Sustainable Generator Innovations

The growth in power demand from the data and sustainability requirements has led to several innovations regarding generator fuel types in the data center generator market. For instance, the market has witnessed innovations in fuel types such as

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hydrotreated vegetable oil, natural gas, hydrogen fuel cells, eco-diesel generators, etc. Further, LCL Data Centers, Datum Datacentres, Compass Datacenters, Interxion (Digital Realty), Kao Data, and Ark Data Centers are some colocation operators investing in adopting the HVO fuel generators. In contrast, hyperscale operators such as AWS announced adopting an HVO fuel backup generator powering its data centers in Dublin, Ireland. Also, AWS has announced to shift to the usage of HVO across all its data centers in Europe.

Adoption of Fuel Cell Generators

The data center industry is significantly transforming towards sustainability, and thus the adoption of several unique solutions has been witnessed in the industry. Operators have started adopting fuel cell generators to overcome the extreme power requirements of the facilities. For instance, Equinix, in partnership with the National University of Singapore, announced its plan to test hydrogen-powered fuel cells as a power source for its data centers in Singapore. Moreover, infrastructure providers such as Caterpillar, Ballard Power Systems, ABB, AFC Energy, Atos, and HDF Energy are involved in expanding and designing the fuel cell generators' product portfolio.

Automation of Infrastructure

The growing concerns about outages and increasing downtime have led data center operators to invest in adopting automation solutions for infrastructure. These solutions include software-defined data centers, artificial intelligence, DCIM solutions, remote handling the facility operations, and others.

SEGMENTATION ANALYSIS

- In terms of generators, the data center generator market has grown in adopting generator sets with a 1.5-3 MW capacity. In contrast, the hyperscale facilities are expected to invest in generators with a capacity of over 3 MW. The market for generators with a capacity of up to 1.5 MW has witnessed investments from edge facilities or on-premises data center operators.
- Generators with less than 1 MW power capacity are mostly adopted in modular data center deployments. They are also being adopted in developing countries by small-scale operators as they are cost-effective. The use of portable generators is also growing in the market.
- The procurement of diesel generators dominates the market adoption, with some facilities across the globe involved in procuring gas generators. For instance, Colt Data Centre Services' Tokyo Otemachi data center has 4,500-kVA gas turbine generators with N+1 redundancy.
- In addition, most of the data center is shifting to the sustainability goals of being carbon neutral. Most operators are adopting new innovative technologies like fuel cell generators, HVO fuel generators, and eco diesel generators to operate the data center facility with zero carbon emissions.
- The adoption of DRUPS systems is increasing in APAC, European, and Latin American regions. The prominent vendors operating in the industry are Rolls Royce, Caterpillar, Piller Group, Hitzinger, and Hitech Power Protection. These systems provide an efficiency of over 96% and eliminate the use of separate UPS and generator systems in a data center environment, leading to significant space benefits.

SEGMENTATION ANALYSIS

Segmentation by System Capacity

- 0-1.5 MW
- 1.5 - 3 MW
- >=3 MW

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Segmentation by Systems

- Drups
- Diesel & Gas & Bi-Fuel Generator
- HVO Fuel

Segmentation by Tier Standards

- Tier I & II
- Tier III
- Tier IV

Segmentation by Geography

- North America
 - o□The U.S.
 - o□Canada
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Chile
 - o□Colombia
 - o□Rest of Latin America
- Western Europe
 - o□The U.K.
 - o□Germany
 - o□France
 - o□Netherlands
 - o□Ireland
 - o□Switzerland
 - o□Italy
 - o□Spain
 - o□Belgium
 - o□Other Western European Countries
- Nordics
 - o□Sweden
 - o□Denmark
 - o□Norway
 - o□Finland & Iceland
- Central & Eastern Europe
 - o□Russia
 - o□Poland
 - o□Other Central & Eastern Europe
- Middle East
 - o□UAE
 - o□Saudi Arabia

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- o Israel
- o Other Middle Eastern Countries
- Africa
 - o South Africa
 - o Kenya
 - o Nigeria
 - o Other African countries
- APAC
 - o China
 - o Hong Kong
 - o Australia
 - o New Zealand
 - o India
 - o Japan
 - o South Korea
 - o Taiwan
 - o Rest of APAC
- Southeast Asia
 - o Singapore
 - o Indonesia
 - o Malaysia
 - o Thailand
 - o Philippines
 - o Vietnam
 - o Other Southeast Asian countries

VENDOR LANDSCAPE

- ABB, Caterpillar, Cummins, Generac Power Systems, HITEC Power Protection, KOHLER, Rolls-Royce, INNIO, and Yanmar (HIMOINSA) are some of the key players in the global data center generator market.

Key Vendors

- ABB
- Caterpillar
- Cummins
- Generac Power Systems
- HITEC Power Protection
- KOHLER
- Rolls-Royce
- Yanmar Holdings (Himoinsa)

Other Prominent Vendors

- Aggreko
- Aksa Power Generation
- Alterra Power Systems (Palmer Johnson)

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- Atlas Copco
- Ausonia
- CK Power
- Detroit Diesel
- DEUTZ
- Enrogen
- Guangzhou Weineng Electromechanical
- HITZINGER Electric Power
- Inmesol
- INNIO
- JCB
- Kirloskar Oil Engines (KOEL)
- Mitsubishi Heavy Industries
- ONIS VISA
- Perkins Engines
- Plug Power

KEY QUESTIONS ANSWERED:

1. How big is the global data center generator market?
2. What is the growth rate of the global data center generator market?
3. Who are the key players in the global data center generator market?
4. What factors drive the data center generator industry growth?
5. How much MW of power capacity is expected to reach the global data center generator market by 2028?

Table of Contents:

- 1 RESEARCH METHODOLOGY
- 2 RESEARCH OBJECTIVES
- 3 RESEARCH PROCESS
- 4 SCOPE & COVERAGE
 - 4.1 MARKET DEFINITION
 - 4.2 BASE YEAR
 - 4.3 SCOPE OF THE STUDY
 - 4.4 MARKET SEGMENTS
 - 4.4.1 MARKET SEGMENTATION BY SYSTEM
 - 4.4.2 MARKET SEGMENTATION BY SYSTEM CAPACITY
 - 4.4.3 MARKET SEGMENTATION BY TIER STANDARD
 - 4.4.4 MARKET SEGMENTATION BY GEOGRAPHY
- 5 REPORT ASSUMPTIONS & CAVEATS
 - 5.1 KEY CAVEATS
 - 5.2 CURRENCY CONVERSION
 - 5.3 MARKET DERIVATION
- 6 PREMIUM INSIGHTS
 - 6.1 KEY HIGHLIGHTS
 - 6.2 MARKET TRENDS

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6.3 SEGMENTATION ANALYSIS

6.4 VENDOR LANDSCAPE

7 MARKET AT A GLANCE

8 INTRODUCTION

8.1 POWER ARCHITECTURE IN DATA CENTERS

8.1.1 GENERATOR SET SELECTION CRITERIA

9 MARKET OPPORTUNITIES & TRENDS

9.1 ADOPTION OF INNOVATIVE GENERATORS

9.1.1 HVO FUEL

9.1.2 NATURAL GAS GENERATORS

9.1.3 ECODIESEL GENERATORS

9.1.4 HYDROGEN CELLS

9.2 5G DEPLOYMENT ACCELERATES EDGE DATA CENTER DEPLOYMENT

9.3 AUTOMATION & REMOTE MONITORING

9.4 REGULATIONS FOR THE USE OF ELECTRIC GENERATORS & THEIR PROCUREMENT

10 MARKET GROWTH ENABLERS

10.1 INCREASED DATA CENTER INVESTMENTS

10.2 DEPLOYMENT OF MODULAR DATA CENTERS & GENSETS

10.3 RISE IN CONSTRUCTION OF HYPERSCALE DATA CENTER FACILITIES

10.4 INCREASED POWER OUTAGES IN DATA CENTERS

11 MARKET RESTRAINTS

11.1 CARBON EMISSIONS BY DATA CENTERS

11.2 LOW ADOPTION OF GENERATORS IN REGIONS WITH STRONG POWER GRID FACILITIES

12 MARKET LANDSCAPE

12.1 MARKET OVERVIEW

12.2 INVESTMENT: MARKET SIZE & FORECAST

12.3 POWER CAPACITY: MARKET SIZE & FORECAST

12.4 FIVE FORCES ANALYSIS

12.4.1 THREAT OF NEW ENTRANTS

12.4.2 BARGAINING POWER OF SUPPLIERS

12.4.3 BARGAINING POWER OF BUYERS

12.4.4 THREAT OF SUBSTITUTES

12.4.5 COMPETITIVE RIVALRY

13 SYSTEM CAPACITY

13.1 MARKET SNAPSHOT & GROWTH ENGINE

13.2 MARKET OVERVIEW

13.3 0-1.5 MW

13.3.1 MARKET SIZE & FORECAST

13.4 1.5-3 MW

13.4.1 MARKET SIZE & FORECAST

13.5 ≥ 3 MW

13.5.1 MARKET SIZE & FORECAST

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14 SYSTEM

14.1 MARKET SNAPSHOT & GROWTH ENGINE

14.2 DRUPS SYSTEMS

14.2.1 MARKET OVERVIEW

14.2.2 MARKET SIZE & FORECAST

14.3 DIESEL, GAS & BI-FUEL GENERATORS

14.3.1 MARKET OVERVIEW

14.3.2 MARKET SIZE & FORECAST

14.4 HVO FUEL

14.4.1 MARKET OVERVIEW

14.4.2 MARKET SIZE & FORECAST

14.5 FUEL CELLS

14.5.1 MARKET OVERVIEW

14.5.2 MARKET SIZE & FORECAST

15 TIER STANDARD

15.1 MARKET SNAPSHOT & GROWTH ENGINE

15.2 MARKET OVERVIEW

15.3 TIER I & II

15.3.1 MARKET OVERVIEW

15.3.2 MARKET SIZE & FORECAST

15.4 TIER III

15.4.1 MARKET OVERVIEW

15.4.2 MARKET SIZE & FORECAST

15.5 TIER IV

15.5.1 MARKET OVERVIEW

15.5.2 MARKET SIZE & FORECAST

16 GEOGRAPHY

16.1 INVESTMENT: MARKET SNAPSHOT & GROWTH ENGINE

16.2 POWER CAPACITY: MARKET SNAPSHOT & GROWTH ENGINE

17 NORTH AMERICA

17.1 MARKET SNAPSHOT & GROWTH ENGINE

17.2 MARKET OVERVIEW

17.3 INVESTMENT: MARKET SIZE & FORECAST

17.4 POWER CAPACITY: MARKET SIZE & FORECAST

17.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

18 US

18.1 MARKET SNAPSHOT & GROWTH ENGINE

18.2 MARKET OVERVIEW

18.3 INVESTMENT: MARKET SIZE & FORECAST

18.4 POWER CAPACITY: MARKET SIZE & FORECAST

19 CANADA

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19.1 MARKET SNAPSHOT & GROWTH ENGINE
19.2 MARKET OVERVIEW
19.3 INVESTMENT: MARKET SIZE & FORECAST
19.4 POWER CAPACITY: MARKET SIZE & FORECAST

20 LATIN AMERICA
20.1 MARKET SNAPSHOT & GROWTH ENGINE
20.2 MARKET OVERVIEW
20.3 INVESTMENT: MARKET SIZE & FORECAST
20.4 POWER CAPACITY: MARKET SIZE & FORECAST
20.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

21 BRAZIL
21.1 MARKET SNAPSHOT & GROWTH ENGINE
21.2 MARKET OVERVIEW
21.3 INVESTMENT: MARKET SIZE & FORECAST
21.4 POWER CAPACITY: MARKET SIZE & FORECAST

22 MEXICO
22.1 MARKET SNAPSHOT & GROWTH ENGINE
22.2 MARKET OVERVIEW
22.3 INVESTMENT: MARKET SIZE & FORECAST
22.4 POWER CAPACITY: MARKET SIZE & FORECAST

23 CHILE
23.1 MARKET SNAPSHOT & GROWTH ENGINE
23.2 MARKET OVERVIEW
23.3 INVESTMENT: MARKET SIZE & FORECAST
23.4 POWER CAPACITY: MARKET SIZE & FORECAST

24 COLOMBIA
24.1 MARKET SNAPSHOT & GROWTH ENGINE
24.2 MARKET OVERVIEW
24.3 INVESTMENT: MARKET SIZE & FORECAST
24.4 POWER CAPACITY: MARKET SIZE & FORECAST

25 REST OF LATIN AMERICA
25.1 MARKET SNAPSHOT & GROWTH ENGINE
25.2 MARKET OVERVIEW
25.3 INVESTMENT: MARKET SIZE & FORECAST
25.4 POWER CAPACITY: MARKET SIZE & FORECAST

26 WESTERN EUROPE
26.1 MARKET SNAPSHOT & GROWTH ENGINE
26.2 MARKET OVERVIEW
26.3 INVESTMENT: MARKET SIZE & FORECAST
26.4 POWER CAPACITY: MARKET SIZE & FORECAST

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26.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

27 UK

27.1 MARKET SNAPSHOT & GROWTH ENGINE

27.2 MARKET OVERVIEW

27.3 INVESTMENT: MARKET SIZE & FORECAST

27.4 POWER CAPACITY: MARKET SIZE & FORECAST

28 GERMANY

28.1 MARKET SNAPSHOT & GROWTH ENGINE

28.2 MARKET OVERVIEW

28.3 INVESTMENT: MARKET SIZE & FORECAST

28.4 POWER CAPACITY: MARKET SIZE & FORECAST

29 FRANCE

29.1 MARKET SNAPSHOT & GROWTH ENGINE

29.2 MARKET OVERVIEW

29.3 INVESTMENT: MARKET SIZE & FORECAST

29.4 POWER CAPACITY: MARKET SIZE & FORECAST

30 NETHERLANDS

30.1 MARKET SNAPSHOT & GROWTH ENGINE

30.2 MARKET OVERVIEW

30.3 INVESTMENT: MARKET SIZE & FORECAST

30.4 POWER CAPACITY: MARKET SIZE & FORECAST

31 IRELAND

31.1 MARKET SNAPSHOT & GROWTH ENGINE

31.2 MARKET OVERVIEW

31.3 INVESTMENT: MARKET SIZE & FORECAST

31.4 POWER CAPACITY: MARKET SIZE & FORECAST

32 SWITZERLAND

32.1 MARKET SNAPSHOT & GROWTH ENGINE

32.2 MARKET OVERVIEW

32.3 INVESTMENT: MARKET SIZE & FORECAST

32.4 POWER CAPACITY: MARKET SIZE & FORECAST

33 ITALY

33.1 MARKET SNAPSHOT & GROWTH ENGINE

33.2 MARKET OVERVIEW

33.3 INVESTMENT: MARKET SIZE & FORECAST

33.4 POWER CAPACITY: MARKET SIZE & FORECAST

34 SPAIN

34.1 MARKET SNAPSHOT & GROWTH ENGINE

34.2 MARKET OVERVIEW

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34.3 INVESTMENT: MARKET SIZE & FORECAST
34.4 POWER CAPACITY: MARKET SIZE & FORECAST

35 BELGIUM

35.1 MARKET SNAPSHOT & GROWTH ENGINE
35.2 MARKET OVERVIEW
35.3 INVESTMENT: MARKET SIZE & FORECAST
35.4 POWER CAPACITY: MARKET SIZE & FORECAST

36 OTHER WESTERN EUROPEAN COUNTRIES

36.1 MARKET SNAPSHOT & GROWTH ENGINE
36.2 MARKET OVERVIEW
36.3 INVESTMENT: MARKET SIZE & FORECAST
36.4 POWER CAPACITY: MARKET SIZE & FORECAST

37 NORDICS

37.1 MARKET SNAPSHOT & GROWTH ENGINE
37.2 MARKET OVERVIEW
37.3 INVESTMENT: MARKET SIZE & FORECAST
37.4 POWER CAPACITY: MARKET SIZE & FORECAST
37.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

38 SWEDEN

38.1 MARKET SNAPSHOT & GROWTH ENGINE
38.2 MARKET OVERVIEW
38.3 INVESTMENT: MARKET SIZE & FORECAST
38.4 POWER CAPACITY: MARKET SIZE & FORECAST

39 DENMARK

39.1 MARKET SNAPSHOT & GROWTH ENGINE
39.2 MARKET OVERVIEW
39.3 INVESTMENT: MARKET SIZE & FORECAST
39.4 POWER CAPACITY: MARKET SIZE & FORECAST

40 NORWAY

40.1 MARKET SNAPSHOT & GROWTH ENGINE
40.2 MARKET OVERVIEW
40.3 INVESTMENT: MARKET SIZE & FORECAST
40.4 POWER CAPACITY: MARKET SIZE & FORECAST

41 FINLAND & ICELAND

41.1 MARKET SNAPSHOT & GROWTH ENGINE
41.2 MARKET OVERVIEW
41.3 INVESTMENT: MARKET SIZE & FORECAST
41.4 POWER CAPACITY: MARKET SIZE & FORECAST

42 CENTRAL & EASTERN EUROPE

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42.1 MARKET SNAPSHOT & GROWTH ENGINE
42.2 MARKET OVERVIEW
42.3 INVESTMENT: MARKET SIZE & FORECAST
42.4 POWER CAPACITY: MARKET SIZE & FORECAST
42.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

43 RUSSIA

43.1 MARKET SNAPSHOT & GROWTH ENGINE
43.2 MARKET OVERVIEW
43.3 INVESTMENT: MARKET SIZE & FORECAST
43.4 POWER CAPACITY: MARKET SIZE & FORECAST

44 POLAND

44.1 MARKET SNAPSHOT & GROWTH ENGINE
44.2 MARKET OVERVIEW
44.3 INVESTMENT: MARKET SIZE & FORECAST
44.4 POWER CAPACITY: MARKET SIZE & FORECAST

45 OTHER CENTRAL & EASTERN EUROPEAN COUNTRIES

45.1 MARKET SNAPSHOT & GROWTH ENGINE
45.2 MARKET OVERVIEW
45.3 INVESTMENT: MARKET SIZE & FORECAST
45.4 POWER CAPACITY: MARKET SIZE & FORECAST

46 MIDDLE EAST

46.1 MARKET SNAPSHOT & GROWTH ENGINE
46.2 MARKET OVERVIEW
46.3 INVESTMENT: MARKET SIZE & FORECAST
46.4 POWER CAPACITY: MARKET SIZE & FORECAST
46.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

47 UAE

47.1 MARKET SNAPSHOT & GROWTH ENGINE
47.2 MARKET OVERVIEW
47.3 INVESTMENT: MARKET SIZE & FORECAST
47.4 POWER CAPACITY: MARKET SIZE & FORECAST

48 SAUDI ARABIA

48.1 MARKET SNAPSHOT & GROWTH ENGINE
48.2 MARKET OVERVIEW
48.3 INVESTMENT: MARKET SIZE & FORECAST
48.4 POWER CAPACITY: MARKET SIZE & FORECAST

49 ISRAEL

49.1 MARKET SNAPSHOT & GROWTH ENGINE
49.2 MARKET OVERVIEW
49.3 INVESTMENT: MARKET SIZE & FORECAST

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49.4 POWER CAPACITY: MARKET SIZE & FORECAST

50 OTHER MIDDLE EASTERN COUNTRIES

50.1 MARKET SNAPSHOT & GROWTH ENGINE

50.2 MARKET OVERVIEW

50.3 INVESTMENT: MARKET SIZE & FORECAST

50.4 POWER CAPACITY: MARKET SIZE & FORECAST

51 AFRICA

51.1 MARKET SNAPSHOT & GROWTH ENGINE

51.2 MARKET OVERVIEW

51.3 INVESTMENT: MARKET SIZE & FORECAST

51.4 POWER CAPACITY: MARKET SIZE & FORECAST

51.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

52 SOUTH AFRICA

52.1 MARKET SNAPSHOT & GROWTH ENGINE

52.2 MARKET OVERVIEW

52.3 INVESTMENT: MARKET SIZE & FORECAST

52.4 POWER CAPACITY: MARKET SIZE & FORECAST

53 KENYA

53.1 MARKET SNAPSHOT & GROWTH ENGINE

53.2 MARKET OVERVIEW

53.3 INVESTMENT: MARKET SIZE & FORECAST

53.4 POWER CAPACITY: MARKET SIZE & FORECAST

54 NIGERIA

54.1 MARKET SNAPSHOT & GROWTH ENGINE

54.2 MARKET OVERVIEW

54.3 INVESTMENT: MARKET SIZE & FORECAST

54.4 POWER CAPACITY: MARKET SIZE & FORECAST

55 OTHER AFRICAN COUNTRIES

55.1 MARKET SNAPSHOT & GROWTH ENGINE

55.2 MARKET OVERVIEW

55.3 INVESTMENT: MARKET SIZE & FORECAST

55.4 POWER CAPACITY: MARKET SIZE & FORECAST

56 APAC

56.1 MARKET SNAPSHOT & GROWTH ENGINE

56.2 MARKET OVERVIEW

56.3 INVESTMENT: MARKET SIZE & FORECAST

56.4 POWER CAPACITY: MARKET SIZE & FORECAST

56.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

57 CHINA

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57.1 MARKET SNAPSHOT & GROWTH ENGINE
57.2 MARKET OVERVIEW
57.3 INVESTMENT: MARKET SIZE & FORECAST
57.4 POWER CAPACITY: MARKET SIZE & FORECAST

58 HONG KONG

58.1 MARKET SNAPSHOT & GROWTH ENGINE
58.2 MARKET OVERVIEW
58.3 INVESTMENT: MARKET SIZE & FORECAST
58.4 POWER CAPACITY: MARKET SIZE & FORECAST

59 AUSTRALIA

59.1 MARKET SNAPSHOT & GROWTH ENGINE
59.2 MARKET OVERVIEW
59.3 INVESTMENT: MARKET SIZE & FORECAST
59.4 POWER CAPACITY: MARKET SIZE & FORECAST

60 NEW ZEALAND

60.1 MARKET SNAPSHOT & GROWTH ENGINE
60.2 MARKET OVERVIEW
60.3 INVESTMENT: MARKET SIZE & FORECAST
60.4 POWER CAPACITY: MARKET SIZE & FORECAST

61 INDIA

61.1 MARKET SNAPSHOT & GROWTH ENGINE
61.2 MARKET OVERVIEW
61.3 INVESTMENT: MARKET SIZE & FORECAST
61.4 POWER CAPACITY: MARKET SIZE & FORECAST

62 JAPAN

62.1 MARKET SNAPSHOT & GROWTH ENGINE
62.2 MARKET OVERVIEW
62.3 INVESTMENT: MARKET SIZE & FORECAST
62.4 POWER CAPACITY: MARKET SIZE & FORECAST

63 SOUTH KOREA

63.1 MARKET SNAPSHOT & GROWTH ENGINE
63.2 MARKET OVERVIEW
63.3 INVESTMENT: MARKET SIZE & FORECAST
63.4 POWER CAPACITY: MARKET SIZE & FORECAST

64 TAIWAN

64.1 MARKET SNAPSHOT & GROWTH ENGINE
64.2 MARKET OVERVIEW
64.3 INVESTMENT: MARKET SIZE & FORECAST
64.4 POWER CAPACITY: MARKET SIZE & FORECAST

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65 REST OF APAC

65.1 MARKET SNAPSHOT & GROWTH ENGINE

65.2 MARKET OVERVIEW

65.3 INVESTMENT: MARKET SIZE & FORECAST

65.4 POWER CAPACITY: MARKET SIZE & FORECAST

66 SOUTHEAST ASIA

66.1 MARKET SNAPSHOT & GROWTH ENGINE

66.2 MARKET OVERVIEW

66.3 INVESTMENT: MARKET SIZE & FORECAST

66.4 POWER CAPACITY: MARKET SIZE & FORECAST

66.5 GENERATOR CAPACITY: MARKET SIZE & FORECAST

67 SINGAPORE

67.1 MARKET SNAPSHOT & GROWTH ENGINE

67.2 MARKET OVERVIEW

67.3 INVESTMENT: MARKET SIZE & FORECAST

67.4 POWER CAPACITY: MARKET SIZE & FORECAST

68 INDONESIA

68.1 MARKET SNAPSHOT & GROWTH ENGINE

68.2 MARKET OVERVIEW

68.3 INVESTMENT: MARKET SIZE & FORECAST

68.4 POWER CAPACITY: MARKET SIZE & FORECAST

69 MALAYSIA

69.1 MARKET SNAPSHOT & GROWTH ENGINE

69.2 MARKET OVERVIEW

69.3 INVESTMENT: MARKET SIZE & FORECAST

69.4 POWER CAPACITY: MARKET SIZE & FORECAST

70 THAILAND

70.1 MARKET SNAPSHOT & GROWTH ENGINE

70.2 MARKET OVERVIEW

70.3 INVESTMENT: MARKET SIZE & FORECAST

70.4 POWER CAPACITY: MARKET SIZE & FORECAST

71 PHILIPPINES

71.1 MARKET SNAPSHOT & GROWTH ENGINE

71.2 MARKET OVERVIEW

71.3 INVESTMENT: MARKET SIZE & FORECAST

71.4 POWER CAPACITY: MARKET SIZE & FORECAST

72 VIETNAM

72.1 MARKET SNAPSHOT & GROWTH ENGINE

72.2 MARKET OVERVIEW

72.3 INVESTMENT: MARKET SIZE & FORECAST

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72.4 POWER CAPACITY: MARKET SIZE & FORECAST

73 OTHER SOUTHEAST ASIAN COUNTRIES

73.1 MARKET SNAPSHOT & GROWTH ENGINE

73.2 MARKET OVERVIEW

73.3 INVESTMENT: MARKET SIZE & FORECAST

73.4 POWER CAPACITY: MARKET SIZE & FORECAST

74 COMPETITIVE LANDSCAPE

75 KEY VENDOR PROFILES

75.1 ABB

75.1.1 BUSINESS OVERVIEW

75.1.2 PRODUCT OFFERINGS

75.2 CATERPILLAR

75.2.1 BUSINESS OVERVIEW

75.2.2 PRODUCT OFFERINGS

75.3 CUMMINS

75.3.1 BUSINESS OVERVIEW

75.3.2 PRODUCT OFFERINGS

75.4 GENERAC POWER SYSTEMS

75.4.1 BUSINESS OVERVIEW

75.4.2 PRODUCT OFFERINGS

75.5 HITEC POWER PROTECTION

75.5.1 BUSINESS OVERVIEW

75.5.2 PRODUCT OFFERINGS

75.6 KOHLER

75.6.1 BUSINESS OVERVIEW

75.6.2 PRODUCT OFFERINGS

75.7 ROLLS-ROYCE

75.7.1 BUSINESS OVERVIEW

75.7.2 PRODUCT OFFERINGS

75.8 YANMAR (HIMONISA)

75.8.1 BUSINESS OVERVIEW

75.8.2 PRODUCT OFFERINGS

76 OTHER PROMINENT VENDORS

76.1 AGGREKO

76.1.1 BUSINESS OVERVIEW

76.1.2 PRODUCT OFFERINGS

76.2 AKSA POWER GENERATION

76.2.1 BUSINESS OVERVIEW

76.2.2 PRODUCT OFFERINGS

76.3 ALTERRA POWER SYSTEMS (PALMER JOHNSON)

76.3.1 BUSINESS OVERVIEW

76.3.2 PRODUCT OFFERINGS

76.4 ATLAS COPCO

76.4.1 BUSINESS OVERVIEW

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76.4.2 PRODUCT OFFERINGS
76.5 AUSONIA
76.5.1 2BUSINESS OVERVIEW
76.5.2 PRODUCT OFFERINGS
76.6 CK POWER
76.6.1 BUSINESS OVERVIEW
76.6.2 PRODUCT OFFERINGS
76.7 DETROIT DIESEL
76.7.1 BUSINESS OVERVIEW
76.7.2 PRODUCT OFFERINGS
76.8 DEUTZ
76.8.1 BUSINESS OVERVIEW
76.8.2 PRODUCT OFFERINGS
76.9 ENROGEN
76.9.1 BUSINESS OVERVIEW
76.9.2 PRODUCT OFFERINGS
76.10 GUANGZHOU WEINENG ELECTROMECHANICAL
76.10.1 BUSINESS OVERVIEW
76.10.2 PRODUCT OFFERINGS
76.11 HITZINGER ELECTRIC POWER
76.11.1 BUSINESS OVERVIEW
76.11.2 PRODUCT OFFERINGS
76.12 INMESOL
76.12.1 BUSINESS OVERVIEW
76.12.2 PRODUCT OFFERINGS
76.13 INNIO
76.13.1 BUSINESS OVERVIEW
76.13.2 PRODUCT OFFERINGS
76.14 JCB
76.14.1 2BUSINESS OVERVIEW
76.14.2 PRODUCT OFFERINGS
76.15 KIRLOSKAR OIL ENGINES
76.15.1 BUSINESS OVERVIEW
76.15.2 PRODUCT OFFERINGS
76.16 MITSUBISHI HEAVY INDUSTRIES
76.16.1 BUSINESS OVERVIEW
76.16.2 PRODUCT OFFERINGS
76.17 ONIS VISA
76.17.1 BUSINESS OVERVIEW
76.17.2 PRODUCT OFFERINGS
76.18 PERKINS ENGINES
76.18.1 BUSINESS OVERVIEW
76.18.2 PRODUCT OFFERINGS
76.19 PLUG POWER
76.19.1 BUSINESS OVERVIEW
76.19.2 PRODUCT OFFERINGS
76.19.3 KEY NEWS

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77 REPORT SUMMARY

77.1 KEY TAKEAWAYS

78 QUANTITATIVE SUMMARY

78.1 GLOBAL DATA CENTER GENERATOR MARKET

78.2 MARKET BY SYSTEM CAPACITY

78.3 MARKET BY SYSTEM

78.4 MARKET BY TIER STANDARD

78.5 MARKET BY GEOGRAPHY

78.5.1 INVESTMENT: MARKET SIZE & FORECAST

78.5.2 POWER CAPACITY: MARKET SIZE & FORECAST

78.6 NORTH AMERICA

78.6.1 MARKET SIZE & FORECAST

78.6.2 MARKET BY SYSTEM CAPACITY

78.7 US

78.7.1 MARKET SIZE & FORECAST

78.8 CANADA

78.8.1 MARKET SIZE & FORECAST

78.9 LATIN AMERICA

78.9.1 MARKET SIZE & FORECAST

78.9.2 MARKET BY SYSTEM CAPACITY

78.10 BRAZIL

78.10.1 MARKET SIZE & FORECAST

78.11 MEXICO

78.11.1 MARKET SIZE & FORECAST

78.12 CHILE

78.12.1 MARKET SIZE & FORECAST

78.13 COLOMBIA

78.13.1 MARKET SIZE & FORECAST

78.14 REST OF LATIN AMERICA

78.14.1 MARKET SIZE & FORECAST

78.15 WESTERN EUROPE

78.15.1 MARKET SIZE & FORECAST

78.15.2 MARKET BY SYSTEM CAPACITY

78.16 UK

78.16.1 MARKET SIZE & FORECAST

78.17 GERMANY

78.17.1 MARKET SIZE & FORECAST

78.18 FRANCE

78.18.1 MARKET SIZE & FORECAST

78.19 NETHERLANDS

78.19.1 MARKET SIZE & FORECAST

78.20 IRELAND

78.20.1 MARKET SIZE & FORECAST

78.21 SWITZERLAND

78.21.1 MARKET SIZE & FORECAST

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78.22 ITALY
78.22.1 MARKET SIZE & FORECAST
78.23 SPAIN
78.23.1 MARKET SIZE & FORECAST
78.24 BELGIUM
78.24.1 MARKET SIZE & FORECAST
78.25 OTHER WESTERN EUROPEAN COUNTRIES
78.25.1 MARKET SIZE & FORECAST
78.26 NORDICS
78.26.1 MARKET SIZE & FORECAST
78.26.2 MARKET BY SYSTEM CAPACITY
78.27 SWEDEN
78.27.1 MARKET SIZE & FORECAST
78.28 DENMARK
78.28.1 MARKET SIZE & FORECAST
78.29 NORWAY
78.29.1 MARKET SIZE & FORECAST
78.30 FINLAND & ICELAND
78.30.1 MARKET SIZE & FORECAST
78.31 CENTRAL & EASTERN EUROPE
78.31.1 MARKET SIZE & FORECAST
78.31.2 MARKET BY SYSTEM CAPACITY
78.32 RUSSIA
78.32.1 MARKET SIZE & FORECAST
78.33 POLAND
78.33.1 MARKET SIZE & FORECAST
78.34 OTHER CENTRAL & EASTERN EUROPEAN COUNTRIES
78.34.1 MARKET SIZE & FORECAST
78.35 MIDDLE EAST
78.35.1 MARKET SIZE & FORECAST
78.35.2 MARKET BY SYSTEM CAPACITY
78.36 UAE
78.36.1 MARKET SIZE & FORECAST
78.37 SAUDI ARABIA
78.37.1 MARKET SIZE & FORECAST
78.38 ISRAEL
78.38.1 MARKET SIZE & FORECAST
78.39 OTHER MIDDLE EASTERN COUNTRIES
78.39.1 MARKET SIZE & FORECAST
78.40 AFRICA
78.40.1 MARKET SIZE & FORECAST
78.40.2 MARKET BY SYSTEM CAPACITY
78.41 SOUTH AFRICA
78.41.1 MARKET SIZE & FORECAST
78.42 KENYA
78.42.1 MARKET SIZE & FORECAST
78.43 NIGERIA

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78.43.1 MARKET SIZE & FORECAST
78.44 OTHER AFRICAN COUNTRIES
78.44.1 MARKET SIZE & FORECAST
78.45 APAC
78.45.1 MARKET SIZE & FORECAST
78.45.2 MARKET BY SYSTEM CAPACITY
78.46 CHINA
78.46.1 MARKET SIZE & FORECAST
78.47 HONG KONG
78.47.1 MARKET SIZE & FORECAST
78.48 AUSTRALIA
78.48.1 MARKET SIZE & FORECAST
78.49 NEW ZEALAND
78.49.1 MARKET SIZE & FORECAST
78.50 INDIA
78.50.1 MARKET SIZE & FORECAST
78.51 JAPAN
78.51.1 MARKET SIZE & FORECAST
78.52 SOUTH KOREA
78.52.1 MARKET SIZE & FORECAST
78.53 TAIWAN
78.53.1 MARKET SIZE & FORECAST
78.54 REST OF APAC
78.54.1 MARKET SIZE & FORECAST
78.55 SOUTHEAST ASIA
78.55.1 MARKET SIZE & FORECAST
78.55.2 MARKET BY SYSTEM CAPACITY
78.56 SINGAPORE
78.56.1 MARKET SIZE & FORECAST
78.57 INDONESIA
78.57.1 MARKET SIZE & FORECAST
78.58 MALAYSIA
78.58.1 MARKET SIZE & FORECAST
78.59 THAILAND
78.59.1 MARKET SIZE & FORECAST
78.60 PHILIPPINES
78.60.1 MARKET SIZE & FORECAST
78.61 VIETNAM
78.61.1 MARKET SIZE & FORECAST
78.62 OTHER SOUTHEAST ASIAN COUNTRIES
78.62.1 MARKET SIZE & FORECAST

79 APPENDIX
79.1 ABBREVIATIONS

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