

## **Data Center Generator Market - Global Outlook & Forecast 2024-2029**

Market Report | 2024-07-18 | 543 pages | Arizton Advisory & Intelligence

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### **Report description:**

By investment, the global data center generator market is expected to grow at a CAGR of 10.36% from 2023 to 2029.

### **MARKET TRENDS**

#### **Sustainable Generator Innovations**

-□ The growth in power demand from the data center sector and the growing emphasis on sustainability have resulted in substantial advancements in generator fuel technology in the data center generator market. These advancements include developing and using numerous fuel types such as HVO, natural gas, hydrogen fuel cells, and eco-diesel.

-□ Some colocation providers, such as LCL Data centers, Datum Datacenters, Compass Datacenters, Interxion (Digital Realty), Kao Data, and Ark Data centers, are investing in HVO-fuel generators. Similarly, hyperscale operators such as AWS have announced their plans to use HVO-fuel backup generators to power their data centers, beginning with facilities in Dublin, Ireland. The company has ambitions to expand this move to all European data centers.

#### **Adoption of Fuel-Cell Generators**

-□ In the ever-changing world of data center operations, a noticeable trend toward sustainability is growing, pushing the adoption of novel solutions. One such idea is to integrate fuel-cell generators to meet the high-power demands of facilities in the data center generator market. Equinix, for example, intends to explore the viability of using hydrogen-powered fuel cells to power its Singapore data centers.

-□ Several infrastructure providers, including Caterpillar, Ballard Power Systems, ABB, AFC Energy, Atos, and HDF Energy, are actively expanding and refining their fuel cell generator product offerings, demonstrating a concerted effort to augment sustainable practices within the industry.

#### **Automation of Infrastructure**

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- In response to the growing concerns about outages and extended downtime, data center operators are dedicating more resources to infrastructure automation solutions.
- These solutions cover a wide range of technologies, including Software-Defined Data Centers (SDDCs), Artificial Intelligence (AI), Data Center Infrastructure Management (DCIM) systems, and remote facility operations management.

## SEGMENTATION INSIGHTS

- In the world of generator sets, there is a widespread preference for units with capacities ranging from 1.5 MW to 3 MW, especially among varied establishments.
- Hyperscale data centers are expected to use generators with capacities exceeding 3 MW. On the other hand, smaller operators and edge facilities are more likely to invest in generators with capacities of up to 1.5 MW in the data center generator market.
- Modular data center deployments mostly rely on generators with a power capacity of less than 1 MW, which are also popular among small-scale operators in underdeveloped countries due to their low cost. Furthermore, the use of portable generators is becoming more frequent.
- Diesel generators are still the most popular procurement choice worldwide, but some facilities are switching to gas generators; for instance, the Tokyo Otemachi data center of Colt Data Center Services has 4,500 kVA gas turbine generators with N+1 redundancy.
- Many data centers aspire to carbon neutrality as part of their environmental goals. Thus, operators are progressively incorporating novel technology into their facilities. These include fuel-cell, HVO-fuel, and eco-diesel generators, which attempt to reduce or eliminate carbon emissions from operations.
- Equinix recently opened its SV11 data center in Silicon Valley. The center uses Bloom Energy's fuel cells as its primary power source and has a total capacity of 20 MW throughout the campus.
- Equinix intends to expand the use of fuel cells in its data centers in New York, Los Angeles, and Silicon Valley.
- Diesel Rotary Uninterruptible Power Supply (DRUPS) systems are widely used in APAC, Europe, and Latin America.
- Market leaders in this field include Rolls Royce, Caterpillar, Piller Group, Hitzinger, and Hitech Power Protection. These systems integrate UPS and generator operations into a single unit, providing over 96% efficiency and considerable space savings in data centers.

## SEGMENTATION ANALYSIS

### Segmentation by System Capacity

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

### Segmentation by System

- DRUPS systems
- Diesel, Gas & Bi-fuel Generators
- HVO Fuel
- Fuel Cells

### Segmentation by Tier Standard

- Tier I & II
- Tier III
- Tier IV

### Segmentation by Geography

- North America
- The U.S.
- Canada

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## VENDOR LANDSCAPE

- ABB, Caterpillar, Cummins, Generac Power Systems, HITEC Power Protection, KOHLER, Rolls-Royce, INNIO, and Yanmar (HIMOINSA) are the major global data center generator market companies.
- These firms provide generator systems with their own engines, including engines from other manufacturers such as MTU, Perkins, Mitsubishi, Deutz, Volvo, Iveco, FG Wilson, and John Deere.
- The introduction of fuel cell generators, which are expected to achieve commercial momentum by 2025, poses a big threat to diesel generator systems.
- Infrastructure companies, such as Caterpillar, Ballard Power Systems, Rolls Royce, ABB, INNIO, Atos, Plug Power, and HDF Energy, are actively conducting research and development to incorporate fuel cell generators and utilizing eco-diesel inside data centers.
- Numerous manufacturers are anticipated to execute pilot projects over the next two years to evaluate the viability and usefulness of these technologies in data center environments.
- INMESOL and KOHLER have launched new generators that use HVO fuel in the data center generator market. Many vendors prioritize system innovation by lowering carbon dioxide emissions, driven by the global carbon taxation laws governments implement.

## Key Vendor Profiles

- ABB
- Business Overview
- Product Offerings
- Caterpillar
- Cummins
- Generac Power Systems
- HITEC Power Protection
- KOHLER
- Rolls-Royce
- Yanmar (HIMOINSA)

## Other Prominent Vendors

- Aggreko
- Business Overview
- Product Offerings
- Aksa Power Generation
- Alterra Power Systems (Palmer Johnson)
- Atlas Copco
- Ausonia
- CK Power

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- INMESOL
- INNIO
- JCB
- Kirloskar Oil Engines
- Mainspring
- Mitsubishi Heavy Industries
- ONIS VISA
- Perkins Engines
- Plug Power
- Vital Power

#### KEY QUESTIONS ANSWERED:

1. How big is the global data center generator market?
2. What are the key trends in the data center generator market?
3. What is the growth rate of the global data center generator market?
4. How many MW of power capacity is expected to reach the global data center generator market by 2029?
5. Who are the key players in the global data center generator market?

#### Table of Contents:

1. REPORT COVERAGE
  - 1.1. WHAT'S INCLUDED
  - 1.2. SEGMENTAL COVERAGE
    - 1.2.1. MARKET SEGMENTATION BY SYSTEM
    - 1.2.2. MARKET SEGMENTATION BY SYSTEM CAPACITY
    - 1.2.3. MARKET SEGMENTATION BY TIER STANDARD
2. MARKET AT A GLANCE
3. PREMIUM INSIGHTS
  - 3.1. KEY HIGHLIGHTS
  - 3.2. MARKET TRENDS
    - 3.2.1. Sustainable generator innovations
    - 3.2.2. Adoption of fuel-cell generators
    - 3.2.3. Automation of infrastructure
  - 3.3. SEGMENTATION ANALYSIS
  - 3.4. VENDOR LANDSCAPE
4. INTRODUCTION
  - 4.1. POWER ARCHITECTURE IN DATA CENTERS
5. MARKET OPPORTUNITIES & TRENDS
  - 5.1. ADOPTION OF INNOVATIVE GENERATORS
    - 5.1.1. HVO fuel

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- 5.1.2.□Natural gas generators
- 5.1.3.□Eco-diesel generators
- 5.1.4.□Hydrogen cells
- 5.2.□5G DEPLOYMENT ACCELERATES EDGE DATA CENTER DEPLOYMENTS
- 5.3.□AUTOMATION & REMOTE MONITORING
- 5.4.□REGULATIONS FOR THE USE & PROCUREMENT OF ELECTRIC GENERATORS
- 6.□MARKET GROWTH ENABLERS
- 6.1.□DEPLOYMENT OF MODULAR DATA CENTERS & GENSETS
- 6.2.□INCREASED POWER OUTAGES IN DATA CENTERS
- 7.□MARKET RESTRAINTS
- 7.1.□CARBON EMISSIONS BY DATA CENTERS
- 7.2.□LOW ADOPTION OF GENERATORS IN REGIONS WITH STRONG POWER GRID FACILITIES
- 8.□MARKET LANDSCAPE
- 8.1.□MARKET OVERVIEW
- 8.2.□INVESTMENT: MARKET SIZE & FORECAST
- 8.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 9.□SYSTEM CAPACITY
- 9.1.□MARKET SNAPSHOT
- 9.2.□MARKET OVERVIEW
- 9.3.□0-1.5 MW
- 9.3.1.□Market Size & Forecast
- 9.4.□1.5-3 MW
- 9.4.1.□Market size & forecast
- 9.5.□>=3 MW
- 9.5.1.□Market Size & Forecast
- 10.□SYSTEM
- 10.1.□MARKET SNAPSHOT
- 10.2.□DRUPS SYSTEMS
- 10.2.1.□Market Overview
- 10.2.2.□Market Size & Forecast
- 10.3.□DIESEL, GAS & BI-FUEL GENERATORS
- 10.3.1.□Market overview
- 10.3.2.□Market size & forecast
- 10.4.□HVO FUEL
- 10.4.1.□Market overview
- 10.4.2.□Market size & forecast
- 10.5.□FUEL CELLS
- 10.5.1.□Market overview
- 10.5.2.□Market size & forecast
- 11.□TIER STANDARD
- 11.1.□MARKET SNAPSHOT
- 11.2.□MARKET OVERVIEW
- 11.3.□TIER I & II
- 11.3.1.□Market overview
- 11.3.2.□Market size & forecast
- 11.4.□TIER III
- 11.4.1.□Market overview

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- 11.4.2.□Market size & forecast
- 11.5.□TIER IV
  - 11.5.1.□Market overview
  - 11.5.2.□Market size & forecast
- 12.□GEOGRAPHY
- 13.□NORTH AMERICA
  - 13.1.□MARKET OVERVIEW
  - 13.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 13.3.□POWER CAPACITY: MARKET SIZE & FORECAST
  - 13.4.□GENERATOR CAPACITY: MARKET SIZE & FORECAST
- 14.□US
  - 14.1.□MARKET OVERVIEW
  - 14.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 14.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 15.□CANADA
  - 15.1.□MARKET OVERVIEW
  - 15.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 15.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 16.□LATIN AMERICA
  - 16.1.□MARKET OVERVIEW
  - 16.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 16.3.□POWER CAPACITY: MARKET SIZE & FORECAST
  - 16.4.□GENERATOR CAPACITY: MARKET SIZE & FORECAST
- 17.□BRAZIL
  - 17.1.□MARKET OVERVIEW
  - 17.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 17.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 18.□MEXICO
  - 18.1.□MARKET OVERVIEW
  - 18.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 18.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 19.□CHILE
  - 19.1.□MARKET OVERVIEW
  - 19.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 19.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 20.□COLOMBIA
  - 20.1.□MARKET OVERVIEW
  - 20.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 20.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 21.□REST OF LATIN AMERICA
  - 21.1.□MARKET OVERVIEW
  - 21.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 21.3.□POWER CAPACITY: MARKET SIZE & FORECAST
- 22.□WESTERN EUROPE
  - 22.1.□MARKET OVERVIEW
  - 22.2.□INVESTMENT: MARKET SIZE & FORECAST
  - 22.3.□POWER CAPACITY: MARKET SIZE & FORECAST

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22.4. □ GENERATOR CAPACITY: MARKET SIZE & FORECAST

23. □ UK

23.1. □ MARKET OVERVIEW

23.2. □ INVESTMENT: MARKET SIZE & FORECAST

23.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

24. □ GERMANY

24.1. □ MARKET OVERVIEW

24.2. □ INVESTMENT: MARKET SIZE & FORECAST

24.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

25. □ FRANCE

25.1. □ MARKET OVERVIEW

25.2. □ INVESTMENT: MARKET SIZE & FORECAST

25.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

26. □ NETHERLANDS

26.1. □ MARKET OVERVIEW

26.2. □ INVESTMENT: MARKET SIZE & FORECAST

26.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

27. □ IRELAND

27.1. □ MARKET OVERVIEW

27.2. □ INVESTMENT: MARKET SIZE & FORECAST

27.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

28. □ SWITZERLAND

28.1. □ MARKET OVERVIEW

28.2. □ INVESTMENT: MARKET SIZE & FORECAST

28.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

29. □ ITALY

29.1. □ MARKET OVERVIEW

29.2. □ INVESTMENT: MARKET SIZE & FORECAST

29.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

30. □ SPAIN

30.1. □ MARKET OVERVIEW

30.2. □ INVESTMENT: MARKET SIZE & FORECAST

30.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

31. □ BELGIUM

31.1. □ MARKET OVERVIEW

31.2. □ INVESTMENT: MARKET SIZE & FORECAST

31.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

32. □ OTHER WESTERN EUROPEAN COUNTRIES

32.1. □ MARKET OVERVIEW

32.2. □ INVESTMENT: MARKET SIZE & FORECAST

32.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

33. □ NORDICS

33.1. □ MARKET OVERVIEW

33.2. □ INVESTMENT: MARKET SIZE & FORECAST

33.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

33.4. □ GENERATOR CAPACITY: MARKET SIZE & FORECAST

34. □ DENMARK

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34.1. □ MARKET OVERVIEW  
34.2. □ INVESTMENT: MARKET SIZE & FORECAST  
34.3. □ POWER CAPACITY: MARKET SIZE & FORECAST  
35. □ SWEDEN  
35.1. □ MARKET OVERVIEW  
35.2. □ INVESTMENT: MARKET SIZE & FORECAST  
35.3. □ POWER CAPACITY: MARKET SIZE & FORECAST

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