# Committee Minutes

**Committee Name:** Market Trends  
**Date and Time:** March 24, 2014  
**Location:** Savannah, GA  
**Chairperson:** Kyle Tingle

## Minutes

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| **1) Data Center Trends**  | - Babak Mohajerani of Thomson Power Systems reviewed survey results from Uptime Institute and Data Center Dynamics.  
  - 150,000 datacenters worldwide (150 kW+)  
  - 332.9 TWh worldwide datacenters – nearly matches the total country power requirements of the UK at 340 TWh.  
  - Investment in datacenters (total of white space & equipment) is growing rapidly from $86B in 2010-2011 to $120B in 2013.  
  - Total space requirements for datacenters has doubled in last 6 years.  
  - Over the next 5 years U.S. will account for 15% of global new space requirements and up to 20% of power requirements.  
  - China will take 8-9 years to develop half the infrastructure of the U.S.  
  - Possibilities to grow are great when considering the possibilities (i.e. planes obtaining IP addresses and being another data feed to the internet).  
  - Highest proportion of growth is in emerging economies (i.e. China, India) with North America still with high growth but a more mature market. | Key points related to genset industry included insights on increased data center budgets in recent years with signs of strong growth in the short to midterm.  
Presentation to be posted on Market Trends Committee page of EGSA website. |
| **2) UL overview, industry focus** | - Maria Surprise and Jason Knedhans from UL to presented on certification codes and testing efforts as they relate to gen sets, transfer switches, switchgear, and other related components.  
  - Directly aligned with CSA. In general they look at trying to align with the other certification agencies when possible (i.e. NFPA, NEC, CSA, CE).  
  - UL 2200 – standard for safety of Stationary Engine Generator Assemblies.  
  **Important Market Trends:**  
  - International regulations (Australia, EU & Emerging Markets).  
  - Controls functionality (overload & paralleling). | $25 gift card given to each Jason & Maria  
Presentation to be posted on Market Trends Committee page of EGSA website.  
If any interest in joining a standards technical panel please contact UL (every manufacturer gets an equal voice). |
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<td>- Remote control &amp; management (smart phone, remote telemetry, power management).&lt;br&gt;- Increase in the number of global producers is driving the need for harmonized standards (concerns for global alignment).&lt;br&gt;- Marketing Surveillance Group (MSG) – send any concerns &amp; they will investigate.&lt;br&gt;- Continued product cost reduction&lt;br&gt;- Increase in supplier level certification (increases marketability for component suppliers).&lt;br&gt;- Portable generator standard (UL 2201) has been written; it is still under review (NEC currently does not govern portable gensets).</td>
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<td>3) Bi-fuel trends</td>
<td>- Lanny Slater of GFS Corp. presented to the committee on the latest bi-fuel applications &amp; trends.&lt;br&gt;- Key advantage is extended run-times for a fixed storage of diesel fuel.&lt;br&gt;- Diesel fuel savings for a fracking site can pay back in 45 days or less.&lt;br&gt;- Growing need to reduce the flaring (burning off of gas) in the oil shale site.&lt;br&gt;- Emergency stationary installation could take over 5 years to payback due to low annual hours.&lt;br&gt;- Datacenters are a targeted market due to more baseload and run-time providing quicker payback.&lt;br&gt;- Irrigation installations offer an excellent payback.&lt;br&gt;- Typical installation costs $25-30k covering material, labor, commissioning and emissions (includes a DOC to control CO emission).&lt;br&gt;- A conditioning skid (scrubber) is required for running well-head gas and can cost up to $100k+ depending on quality of gas test.&lt;br&gt;- Estimated 7,000-8,000 Bi-Fuel systems installed in North America at the current time.&lt;br&gt;- Most 4 cycle turbocharged engines are candidates to be Bi-Fueled.</td>
<td>- Key advantage is extended run-times for a fixed storage of diesel fuel.&lt;br&gt;- Presentation will be posted on the Market Trends site.</td>
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<td>4) New business</td>
<td>- Leader: Kyle Tingle&lt;br&gt;- Topics for Fall meeting to include: committee officer elections, annual Pulse Survey, and annual update for Historical Diesel &amp; Gas Turbine survey results.&lt;br&gt;- Chris Nagle of Dresser Rand has volunteered to champion the Pulse Survey.</td>
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### 5) Topics for Fall 2014 conference in San Diego

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| Leader: Kyle Tingle | - Seismic Certifications relevant to CA (OSHPOD) - (Don Blackman from ASCO has contacts he could pass along)  
- CARB speaker for gas engines – SCAQMD is already speaking in general session.  
- Interest in CHP type speaker. | Kyle Tingle to organize sub-committee and search for speakers in advance of Fall conference in San Diego. |