



Committee Minutes

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

Minutes

Topic	Discussion	Conclusions / Actions
1) <i>Data Center Trends</i>	<ul style="list-style-type: none"> - 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. 	<p>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 mid-term.</p> <p>Presentation to be posted on Market Trends Committee page of EGSA website.</p>
2) <i>UL overview, industry focus</i>	<ul style="list-style-type: none"> - Maria Surprise and Jason Knedlhans 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. <p><u>Important Market Trends:</u></p> <ul style="list-style-type: none"> -International regulations (Australia, EU & Emerging Markets). -Controls functionality (overload & paralleling). 	<p>\$25 gift card given to each Jason & Maria</p> <p>Presentation to be posted on Market Trends Committee page of EGSA website.</p> <p>If any interest in joining a standards technical panel please contact UL (every manufacturer gets an equal voice).</p>

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	<ul style="list-style-type: none"> -Remote control & management (smart phone, remote telemetry, power management). -Increase in the number of global producers is driving the need for harmonized standards (concerns for global alignment). -Marketing Surveillance Group (MSG) – send any concerns & they will investigate. -Continued product cost reduction -Increase in supplier level certification (increases marketability for component suppliers). -portable generator standard (UL 2201) has been written; it is still under review (NEC currently does not govern portable gensets). 	
3) <i>Bi-fuel trends</i>	<ul style="list-style-type: none"> -Lanny Slater of GFS Corp. presented to the committee on the latest bi-fuel applications & trends. -Key advantage is extended run-times for a fixed storage of diesel fuel. -Diesel fuel savings for a fracking site can pay back in 45 days or less. -Growing need to reduce the flaring (burning off of gas) in the oil shale site. -Emergency stationary installation could take over 5 years to payback due to low annual hours. -Datacenters are a targeted market due to more baseload and run-time providing quicker payback. -Irrigation installations offer an excellent payback -Typical installation costs \$25-30k covering material, labor, commissioning and emissions (includes a DOC to control CO emission). -A conditioning skid (scrubber) is required for running well-head gas and can cost up to \$100k+ depending on quality of gas test. -estimated 7,000-8,000 Bi-Fuel systems installed in North America at the current time. -Most 4 cycle turbocharged engines are candidates to be Bi-Fueled. 	<ul style="list-style-type: none"> -Key advantage is extended run-times for a fixed storage of diesel fuel. -Presentation will be posted on the Market Trends site.
4) <i>New business</i>	<ul style="list-style-type: none"> - Leader: Kyle Tingle -Topics for Fall meeting to include: committee officer elections, annual Pulse Survey, and annual update for Historical Diesel & Gas Turbine survey results. -Chris Nagle of Dresser Rand has volunteered to champion the Pulse Survey. 	Chris Nagle of Dresser Rand has volunteered to champion the Pulse Survey.

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5) <i>Topics for Fall 2014 conference in San Diego</i>	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.