

Modular Uninterruptible Power Supply (UPS) Market: Market Segments: By Component (Solution and Services); By Organization Size (Large Enterprises, and Small and Medium-sized Enterprises (SMEs)); By Application (Clinical Trials, Learning, and Research); By Vertical (BFSI, Retail, IT & Telecom, Education, Healthcare, and Others); and Region – Analysis of Market Size, Share & Trends for 2014 – 2019 and Forecasts to 2030

<https://marketpublishers.com/r/M46A282014F2EN.html>

Date: April 2022

Pages: 152

Price: US\$ 4,350.00 (Single User License)

ID: M46A282014F2EN

Abstracts

Product Overview

Modular UPS is the combination of series-connected small UPS modules that allows the user to modify any failed module without shutting down the entire device. Modular UPS increases the capacity of the power supply and decreases operating and maintenance costs. Additionally, if it runs at or closer to its full rated capacity, the performance of a modular UPS is high. With fixed capacity UPS systems, the ability to reconfigure a modular UPS system to meet load demands offers a degree of versatility that is not accessible. This can be used to maximize operational performance, as the device flips the unnecessary operations into 'sleep mode' automatically.

Market Highlights

The modular Uninterruptible Power Supply (UPS) Market is expected to project a notable CAGR of 10.3% in 2030.

Modular Uninterruptible Power Supply (UPS) Market to surpass USD 8.4 billion by 2030 from USD 3.2 billion in 2018 at a CAGR of 10.3% throughout the forecast period, i.e., 2019-30. Growing demand for zero power downtime from different industries, increasing

need for flexible and reliable power systems, and demand for hyper-scale data centers, cloud use, and large colocation facilities are the key factors driving the growth of the Modular UPS industry. In order to propel the data center's uninterrupted power supply industry, the growing adoption of cloud storage services and the increasing need for uninterrupted power to ensure productive operations in banks, financial institutions, and companies are anticipated. One of the key growth drivers for this market is the growing adoption of modular data center UPS systems. The wide adoption of cloud servers, which pack more power into smaller spaces, is projected to drive the uninterrupted power supply market of the data center.

Modular Uninterruptible Power Supply (UPS) Market: Segments

10-100 kVA segment to grow with the highest CAGR of XX.X% during 2019-30

The modular Uninterruptible Power Supply (UPS) Market is segmented by Power Capacities as 10 - 100 kVA, 101 - 250 kVA, 251, and 500 kVA. The 10-100 kVA solution is projected to have the largest segment in the Modular UPS market during the forecast period. Various BFSI service providers, small and medium-sized data centers, cloud service providers, and telecommunication operators are commonly using modular UPS solutions in this range as they provide efficient maintenance, better scalability, and enhanced services. These solutions offer many advantages in the 51-100 kVA range, such as improved usability, easy expansion of installation and capacity, hassle-free maintenance, and expansion of on-demand capacity, while improving business performance. Emerson, Huawei, and Schneider Electric are major vendors offering these solutions.

The SMEs segment to grow with the highest CAGR of XX.X% during 2019-30

The modular Uninterruptible Power Supply (UPS) Market is segmented by organization size into large enterprises and SMEs. The Large Enterprises segment is expected to hold the largest market share and has witnessed a very high demand over the forecast years. In large enterprises, the adoption of modular UPS systems and services is higher, and the trend is expected to continue during the forecast era. Modular UPS systems provide continuous power supply to large businesses, with various power range modules. Large companies are now investing heavily in advanced technology to improve their overall productivity and performance. It is expected that large enterprises' appetite for versatile, scalable, and convenient services will motivate industry players to develop new technologies and creative solutions.

Modular Uninterruptible Power Supply (UPS) Market: Market Dynamics

Drivers

High growth in Colocation and Cloud Services

The demand for modular, uninterrupted power supplies is driven primarily by the growing number of new data centers and lower ownership costs. The modular UPS market is also powered by the ease of implementation and a highly scalable model. In addition, low maintenance costs and reliable facilities often motivate the customer to use modular UPS. There is a significant step toward cloud computing that is likely to create data storage and security requirements. Such data centers often need continuous power backup and services that are rising the global demand for UPS data centers. A rise in the adoption of services such as remote access services, mobile computing, and online services through various ventures are some of the other major drivers of this global modular UPS market.

Increasing demand for zero power downtime from various sectors

Enterprises have undergone digitalization in every industry. This has contributed to a reliance on electronic devices for business processes to capture and access information. This increases dependency on a power supply that is secure and constant. Enterprises do not run business operations without a power source. In the event of a power failure or loss of the primary power source, the power supply must be guaranteed and secure. UPS guarantees stability and efficiency when primary power goes down so that ongoing work can be saved and hardware can be covered. Although the demand for UPS systems in the IT industry is strong, microprocessors and PC-based systems that are susceptible and responsive to power disruptions have now been adopted by many industrial processes. Industrial systems may be interrupted by a few seconds of a power outage, causing significant financial losses. Most sectors have therefore begun to implement advanced UPS and modular UPS systems across industries.

Restrain

Lack of Awareness Amongst Non-Data Center Applications

Low awareness of the benefits of modular uninterrupted power supplies for improving business operations and efficiency across industries especially in emerging markets such as India, China, Brazil, and Argentina, is hindering the growth of the modular UPS market. In addition, modular UPS are in-rows' built, i.e. adding extra space and weight in the machine room and difficulty in the delivery of the circuit are some of the key factors hindering the growth of the modular UPS market. The slow growth rate of technological innovation will serve as a major constraint that is likely to impact the growth of the global economy.

Modular Uninterruptible Power Supply (UPS) Market: Key Players

ABB Ltd

Company Overview

Business Strategy
Key Product Offerings
Financial Performance
Key Performance Indicators
Risk Analysis
Recent Development
Regional Presence
SWOT Analysis
Emerson Network Power
Huawei Technologies Co. Ltd
Schneider Electric SE
General Electric
Delta Electronics Inc.
AEG Power Solutions
Riello Elettronica Group
Eaton Corporation

Modular Uninterruptible Power Supply (UPS) Market: Regions

The modular Uninterruptible Power Supply (UPS) Market is segmented based on regional analysis into five major regions. These include North America, Latin America, Europe, APAC, and MENA.

The modular Uninterruptible Power Supply (UPS) Market in North America held the largest market share of XX.X% in the year 2018 and it is expected to continue its market dominance in the future because of the existence of collocation and data centre facilities and technologically advanced countries such as the US and Canada. There is a high demand in the region for modular UPS solutions especially from the sectors of IT and telecommunications, healthcare, and manufacturing. Every day, an enormous amount of digital content is produced, which is expected to drive the need for UPS solutions for data centers, especially in the European region. France, Germany, and the U.K. The region's expansion is expected to be at the forefront. The global demand in the Asia Pacific region is projected to see a notable rise in the coming years. In emerging countries such as India and China, an exceptional increase in collaborative data centers is expected to stimulate the growth of the UPS industry in the future.

Competitive Landscape:

The Modular Uninterruptible Power Supply (UPS) market, which is highly competitive, consists of several major players such as Schneider Electric (France), Huawei (China), ABB (Switzerland), Eaton (Ireland), Emerson (US), Legrand (France), Vertiv (US), Rittal (Germany) hold a substantial market share in the Modular Uninterruptible Power Supply

(UPS) market. Other players analyzed in this report are Delta Electronics (Taiwan), Toshiba (Japan), HPE (US), AEG Power Solutions (Netherlands), Panduit (US), Gamatronic (Israel), Tripp-Lite (US), Xtreme Power (US), Socomec (France), Centinel (Switzerland), Cyberpower (US), Riello UPS (Italy), and Borri (Italy) among others.

The market competition has been stepped up by the availability of many players offering Modular Uninterruptible Power Supply (UPS). For Instance, In February 2020, Huawei launched its UPS power module across the world. This launch enables the power density of a single module to reach up to 100 kW/3 U. This facilitates improved data center utilization and increases revenue.

Modular Uninterruptible Power Supply (UPS) Market is further segmented by region into:

North America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United States and Canada

Latin America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – Mexico, Argentina, Brazil, and Rest of Latin America

Europe Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United Kingdom, France, Germany, Italy, Spain, Belgium, Hungary, Luxembourg, Netherlands, Poland, NORDIC, Russia, Turkey, and Rest of Europe

APAC Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – India, China, South Korea, Japan, Malaysia, Indonesia, New Zealand, Australia, and Rest of APAC

MENA Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – North Africa, Israel, GCC, South Africa, and Rest of MENA

Modular Uninterruptible Power Supply (UPS) Market report also contains analysis on:
Modular Uninterruptible Power Supply (UPS) Market Segments:

By Power Capacities:

0 – 50 kVA

51 – 100 kVA

101 – 300 kVA

301 and Above kVA

By Organization Size:

Large Enterprises

Small and Medium-sized Enterprises (SMEs)

By End User:

Data Centers

Industrial

Telecommunication

Commercial

BFSI

Government/Infrastructure

Other

Modular Uninterruptible Power Supply (UPS) Market Dynamics

Modular Uninterruptible Power Supply (UPS) Market Size

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Current Trends/Issues/Challenges

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3. HUAWEI TECHNOLOGIES CO. LTD

4. SCHNEIDER ELECTRIC SE

5. GENERAL ELECTRIC

6. DELTA ELECTRONICS INC.

7. AEG POWER SOLUTIONS

8. RIELLO ELETTRONICA GROUP

9. EATON CORPORATION

Consultant Recommendation

*The above-given segmentations and companies could be subjected to further modification based on in-depth feasibility studies conducted for the final deliverable.

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