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Transformerless UPS Market Report by Component Type (Rectifier and Inverter Components, Battery, PCB, Electromechanical Components, and Others), Power (10-100 KVA, 101-250 KVA, More than 250 KVA), End Use Industry (BFSI, Telecommunication, Government, Manufacturing, Transportation, Healthcare, and Others), and Region 2024-2032

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Abstracts

The global transformerless UPS market size reached US$ 2.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 5.7 Billion by 2032, exhibiting a growth rate (CAGR) of 11.5% during 2024-2032. The market is experiencing steady growth driven by rapid digital transformation of various sectors, including manufacturing, healthcare, finance, and communications, rising environmental concerns, and increasing focus on total cost of ownership (TCO) worldwide.

Transformerless UPS Market Analysis:
Market Growth and Size: The market is witnessing stable growth, driven by the increasing demand for efficient power protection solutions. Additionally, the rising adoption of renewable energy sources is catalyzing the demand for transformerless UPS systems.
Technological Advancements: Ongoing technological advancements are resulting in more compact and efficient transformerless UPS systems. In addition, improved power electronics and digital control systems enhance performance and reliability.
Industry Applications: Transformerless UPS systems find applications across industries, including telecommunications, healthcare, and manufacturing, where continuous power is critical for operations.
Geographical Trends: North America leads the market on account of its robust industrial

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infrastructure. However, Asia Pacific is emerging as a fast-growing market, which can be attributed to the thriving IT sector and rapid industrialization.
Competitive Landscape: Key players in the market are actively engaged in several strategic initiatives. They are continually innovating their product portfolios to enhance energy efficiency and power quality, meeting the evolving demands of various industries.
Challenges and Opportunities: While the market faces challenges, such as the high initial cost of transformerless UPS systems and the need for skilled maintenance, it also encounters opportunities in the growing awareness among the masses about the importance of uninterruptible power supply (UPS) and the increasing digitization of industries.
Future Outlook: The future of the transformerless UPS market looks promising, with the increasing demand for energy efficiency and power reliability. Innovations in battery technology and remote monitoring capabilities are expected to drive future advancements in the market.

Transformerless UPS Market Trends:
Increasing digitization of industries

The rapid digital transformation of various sectors, including manufacturing, healthcare, finance, and communications, is propelling the growth of the market. As businesses rely more on electronic data processing and storage, the need for uninterrupted power supply becomes paramount to prevent costly downtime and data loss. The transformerless UPS systems offer several advantages that align with the requirements of digital industries. They provide a seamless transition to battery power during electrical disturbances, ensuring that critical systems remain operational. Moreover, their energy efficiency and smaller footprint make them suitable for data centers and other space-constrained applications. As industries are embracing digital technologies and automation, the demand for transformerless UPS systems is growing, making them a vital component in ensuring the reliability of modern business operations.

Environmental sustainability initiatives

Environmental concerns and sustainability initiatives around the world are bolstering the growth of the market. Companies are increasingly focusing on reducing their carbon footprint and energy consumption. Transformerless UPS systems align with these objectives due to their superior energy efficiency compared to traditional transformer-based counterparts. These systems waste less energy in the form of heat, resulting in reduced cooling requirements and lower overall power consumption. Additionally, their

ability to operate at higher efficiency levels during partial loads is contributing to energy savings. Governments and regulatory bodies are also promoting energy-efficient technologies through various incentives and mandates. This, in turn, is encouraging businesses to adopt transformerless UPS solutions as part of their sustainability strategies.

Data center expansion

The rapid expansion of data centers, driven by the increasing demand for cloud computing, online services, and big data analytics, is impelling the growth of the market. Data centers require uninterrupted power to maintain critical operations and protect sensitive information. Transformerless UPS systems are well-suited for data center applications due to their high efficiency, smaller footprint, and scalability. They can efficiently support the growing power demands of data centers while minimizing energy wastage and maximizing space utilization. With the ongoing proliferation of data-driven technologies and the global shift towards remote work and digital services, data center construction and expansion are rising, which is positively influencing the market.

Increasing focus on total cost of ownership (TCO)

A growing emphasis on total cost of ownership (TCO) is offering a favorable market outlook. Organizations are increasingly looking beyond the initial purchase cost and considering the long-term operating expenses associated with power protection solutions. Transformerless UPS systems offer compelling TCO advantages due to their energy efficiency and reduced maintenance requirements. Their higher efficiency translates into lower electricity bills over the life of the system, making them a cost-effective choice in the long run. Additionally, their solid-state design reduces the need for regular maintenance and replacement of mechanical components found in traditional UPS units.

Transformerless UPS Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on component type, power, and end use industry

Breakup by Component Type:

Rectifier and Inverter Components
Battery

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PCB
Electromechanical Components
Others

Rectifier and inverter components account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the component type. This includes rectifier and inverter components, battery, PCB, electromechanical components, and others. According to the report, rectifier and inverter components represented the largest segment.

The rectifier and inverter components are the heart of any UPS system, responsible for converting incoming AC power to DC and then back to clean AC power for critical loads. Transformerless UPS systems are known for their advanced rectifier and inverter technologies, offering high efficiency and improved power quality. With increasing demand for energy-efficient solutions and the need for reliable power, this segment continues to dominate the market. Technological advancements in these components are further increasing their efficiency, making them a preferred choice for various applications, including data centers, manufacturing, and healthcare.

Batteries are a crucial component of transformerless UPS systems, providing backup power during outages or voltage fluctuations. Although the rectifier and inverter components are the largest segment, the battery segment is substantial, as it directly impacts the backup time and reliability of the UPS. Advancements in battery technology, such as the adoption of lithium-ion batteries, are extending backup durations while reducing the physical footprint.

The printed circuit board (PCB) segment encompasses the electronic control and monitoring systems within transformerless UPS units. PCBs play a critical role in ensuring the seamless operation and protection of connected equipment. They manage various functions, including fault detection, load management, and communication with external systems.

Electromechanical components, though less prominent in modern transformerless UPS systems, still play a role in some older or specialized models. These components include switches, relays, and mechanical bypasses.

Breakup by Power:

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10-100 KVA
101-250 KVA
More than 250 KVA

10-100 KVA holds the largest share in the industry

A detailed breakup and analysis of the market based on the power have also been provided in the report. This includes 10-100 KVA, 101-250 KVA, and more than 250 KVA. According to the report, 10-100 KVA accounted for the largest market share.

The 10-100 KVA segment is particularly popular among small to medium-sized businesses and organizations with moderate power protection requirements. It offers an excellent balance between capacity and cost-effectiveness, making it suitable for a wide range of applications, including retail stores, branch offices, and regional data centers. Transformerless UPS systems in this power range provide reliable protection against power disturbances while being more energy-efficient and compact compared to traditional UPS units. The growing need for cost-effective and robust power backup solutions is catalyzing the demand for transformerless UPS in this segment.

The 101-250 KVA segment caters to organizations with more substantial power protection needs. This range is commonly chosen by larger enterprises, data centers, and industrial facilities that require higher power capacities to support critical operations. Transformerless UPS systems within this segment provide enhanced scalability and robust performance. They are capable of handling larger loads and offer advanced features, such as parallel redundancy for increased reliability.

The more than 250 KVA segment represents the highest power capacity range in the transformerless UPS market. It serves large-scale data centers, industrial complexes, and facilities with extensive power demands. Transformerless UPS systems in this segment are designed to handle massive loads and provide exceptional scalability and redundancy options.

Breakup by End Use Industry:

BFSI
Telecommunication
Government
Manufacturing
Transportation

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Healthcare
Others

BFSI represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes BFSI, telecommunication, government, manufacturing, transportation, healthcare, and others. According to the report, BFSI represented the largest segment, as it requires continuous and reliable power to safeguard financial transactions, manage critical data, and ensure uninterrupted operations. Transformerless UPS systems provide the high-quality power needed to support servers, ATMs, electronic transactions, and data centers in this sector. As financial institutions continue to digitize their services and face stringent regulatory requirements, the demand for transformerless UPS solutions is rising.

The telecommunication industry relies heavily on transformerless UPS systems to maintain uninterrupted communication services. Mobile networks, data centers, and communication hubs require a stable power supply to ensure seamless connectivity. Transformerless UPS units offer high efficiency, compact design, and the ability to adapt to varying loads, making them a preferred choice for telecom operators.

Government organizations across the globe require secure and reliable power solutions to support critical operations, including data storage, emergency services, and administrative functions. Transformerless UPS systems are favored for their energy efficiency, reduced footprint, and advanced monitoring capabilities.

The manufacturing sector relies on transformerless UPS systems to protect sensitive equipment and control systems from power disruptions. Industries, such as automotive, electronics, and pharmaceuticals, require stable power to ensure quality production and minimize downtime.

The transportation sector, including airports, railways, and ports, relies on transformerless UPS systems to ensure continuous operation of critical systems, such as air traffic control, ticketing, and baggage handling. These UPS solutions provide reliable power protection against voltage sags, surges, and outages.

Breakup by Region:

North America

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United States
Canada
Asia Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America leads the market, accounting for the largest transformerless UPS market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share due to its robust industrial infrastructure, extensive data center presence, and technological advancements. North American businesses prioritize reliability and efficiency, making transformerless UPS solutions an attractive choice for applications, ranging from data centers to healthcare facilities. The commitment to energy efficiency and a strong focus on digitalization further bolstering the growth of this market segment in the region.

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The Asia Pacific region represents a dynamic and rapidly expanding market for transformerless UPS systems. The growing economies, rapid industrialization, and thriving IT sector in countries like China and India is catalyzing the demand for reliable power protection solutions. Transformerless UPS units are well-suited to meet the requirements of a diverse range of industries in the region.

Europe is another significant segment in the transformerless UPS market. The region places a strong emphasis on sustainability, which aligns well with the energy-efficient nature of transformerless UPS systems. European industries, including manufacturing and telecommunications, require uninterrupted power to maintain productivity and meet stringent environmental regulations.

Latin America is experiencing steady growth in the transformerless UPS market. While not as mature as some other regions, the demand for reliable power protection solutions is on the rise. Industries, such as telecommunications, healthcare, and banking are key drivers in this region.

The Middle East and Africa region exhibit a growing interest in transformerless UPS systems, driven by increasing investments in infrastructure, data centers, and telecommunications. The energy-intensive industries in the region recognize the importance of reliable power supply, making transformerless UPS solutions an asset.

Leading Key Players in the Transformerless UPS Industry:
Key players in the market are actively engaged in several strategic initiatives. They are continually innovating their product portfolios to enhance energy efficiency and power quality, meeting the evolving demands of various industries. These companies are also investing in research and development (R&D) activities to introduce advanced features like smart monitoring, predictive maintenance, and remote management capabilities, which enhance the reliability and performance of their transformerless UPS systems. Additionally, they are expanding their global reach through partnerships, acquisitions, and market penetration strategies, allowing them to tap into emerging markets and meet the increasing demand for efficient power protection solutions worldwide.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

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Eaton Corporation Plc
Emerson Electric Co.
General Electric Company
Mitsubishi Electric Corporation
RPS S.p.A (Riello Elettronica S.p.A.)
Schneider Electric
Shenzhen Kstar Science & Technology Co. Ltd.
Toshiba Corporation

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:
July 15, 2021: Eaton Corporation Plc announced the global launch of the 9PX lithium-ion uninterruptible power supply (UPS). This new UPS provides longer battery life and a smaller footprint than valve regulated lead-acid (VRLA) battery-powered UPS technology, making it ideal for distributed, edge environments and light industrial applications, ranging from healthcare to education.
June 25, 2020: Schneider Electric, the leader in digital transformation of energy management and automation, and Cisco formed a technology partnership designed to drive major advances in making smart buildings the standard. Working together, the two companies will develop, test, and validate designs that help connect building management systems to an Internet Protocol (IP) network with a secure, scalable and resilient architecture that is easy to manage.
January 31, 2022: ABB Ltd. announced it has increased its majority stake in Chinese electric vehicle (EV) charging provider, Chargedot Shanghai New Energy Technology Co., Ltd. (Chargedot) to 80%. ABB had previously acquired a 67% stake in Chargedot in March 2020. The additional investment is part of ABB E-mobility’s growth strategy and further strengthens ABB’s position in the rapidly growing Chinese e-mobility market.

Key Questions Answered in This Report

1. What was the size of the global transformerless UPS market in 2023?
2. What is the expected growth rate of the global transformerless UPS market during 2024-2032?
3. What are the key factors driving the global transformerless UPS market?
4. What has been the impact of COVID-19 on the global transformerless UPS market?
5. What is the breakup of the global transformerless UPS market based on the

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component type?
6. What is the breakup of the global transformerless UPS market based on the power?
7. What is the breakup of the global transformerless UPS market based on the end use industry?
8. What are the key regions in the global transformerless UPS market?
9. Who are the key players/companies in the global transformerless UPS market?

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