

Rotary Uninterruptible Power Supply (UPS) Market by Power Rating (up to 1000 kVA, 1001-2000 kVA, 2001-2500 kVA, and Above 2500 kVA), Type (Diesel, Hybrid), Application, and Region(APAC, North America, Europe, MEA, South America) - Global Forecast to 2026

<https://marketpublishers.com/r/R86CC53D2194EN.html>

Date: April 2021

Pages: 170

Price: US\$ 4,950.00 (Single User License)

ID: R86CC53D2194EN

Abstracts

The global rotary UPS market is projected to reach USD 0.8 billion by 2026 from an estimated USD 0.7 billion in 2021, at a CAGR of 4.9% during the forecast period. The growing need for zero downtime power supply solutions for critical power applications is the major driver of the rotary or rotary UPS market. The advantages of rotary UPS such as high efficiency, fewer space requirements, and low lifetime costs are expected to further drive the demand. Increasing data center investments are expected to be the single biggest contributing factor to the growth of rotary UPS market during forecast period. However, Due to the COVID-19 pandemic, local currencies of many countries have depreciated. There is a misalignment of supply and demand, leading to financial losses for components/parts manufacturers. Key components used in manufacturing rotary UPSs are procured typically in US dollars, which results in increased component cost, which is likely to hamper the growth of the rotary UPS market.

“The diesel segment, by type, is expected to be the largest market from 2021 to 2026.”

The rotary UPS market by type is categorized into 3 segments namely diesel, hybrid, and others. The use of a diesel engine and other mechanical storage solutions in place of batteries in static UPS leads to the long operating life of rotary UPS and low lifetime costs. The cost of battery replacement, which is inevitable at least once every five years, in the case of static UPS is eliminated in rotary UPS. All the key components

such as the engine, flywheel, and motor generator set can be placed in one soundproof container or enclosure, which leads to space-saving as well as the reduction in noise pollution. DRUPS also eliminates the need for backup generation sets that are very much necessary in the case of static UPS for long-duration continuous power supply. These advantages are expected to drive the market.

“The healthcare & pharmaceuticals segment, by application, is expected to be the fastest-growing market from 2021 to 2026.”

The high-speed engine market, by application, is segmented into aerospace & defense, electronics & semiconductors, manufacturing industry, IT & Telecommunications, datacenter, healthcare & pharmaceuticals, and others. Others include commercial, rail, and transport. Reliable and constant electrical power is of paramount importance for the smooth operations of modern healthcare facilities. Even small interruptions in power can be detrimental to the health of patients in critical care or those undergoing surgeries. Critical units of healthcare facilities must be equipped with special systems to protect their networks against interruptions. Surgical lights, infusion pumps, electrocardiogram (ECG) machines, ventilators, anesthesia machines, and other medical equipment require a continuous power supply. Uninterruptible power supply (UPS) systems are installed in hospitals to provide immediate, short-term electricity as a backup in the event of an electrical power outage. While hospitals and other healthcare facilities are equipped with large emergency power generators, these backup generators can take several seconds to supply power throughout facilities. Thus, a constant power supply is important in hospitals to maintain life-saving daily operations. Pharmaceutical manufacturing consists of precision engineered machines that are usually automated. The manufacture of vaccines and specialized medicine is even more complicated and requires controlled environments and refrigeration post-manufacturing, any loss of power can lead to damage to goods and can lead to life-threatening issues. The criticality of applications and need for uninterrupted power is expected to contribute to the market growth.

“Europe: The largest market by region in the rotary UPS market.”

Europe is expected to be the largest rotary UPS market during the forecast period. Europe includes the UK, Russia, Germany, France, and the Rest of Europe. The Rest of Europe includes Norway, Sweden, and Finland, among others. Germany and the UK are the largest markets for rotary UPS in Europe. Germany, the UK, and France are among the top four destinations for data center investments in Europe. The growing investments in data centers are expected to be the major driver for the growth of the

rotary UPS market. Thriving IT & telecom and pharmaceuticals sectors in Germany, and aerospace and pharmaceuticals sectors in France present the second biggest opportunity for the growth of rotary UPS in Europe.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information and to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 30%, Tier 2- 30%, and Tier 3- 40%

By Designation: C-Level- 15%, Director Level- 20%, and Others- 65%

By Region: Asia Pacific- 60%, Europe- 15%, North America- 10%, Middle East & Africa- 10%, and South America- 5%

*Others include sales managers, engineers, and regional managers.

Note: Tier 1 Company—Revenue > USD 5 billion, Tier 2 Company—Revenue between USD 50 million and USD 5 billion, and Tier 3 Company—Revenue

The global rotary UPS market is dominated by a few major players with an extensive regional presence and a few other local regional players. The leading players in the rotary UPS market are Piller Power System (Germany), Hitec Holdings (Netherlands), Rolls Royce Holdings (UK), Hitzinger (Austria), and IEM Power System (US)

Study Coverage:

The report defines, describes, and forecasts the rotary UPS market by type, power rating, application, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market, including the analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the rotary UPS market.

Key Benefits of Buying the Report

1. The report identifies and addresses the key markets for rotary UPS sales, which would help equipment manufacturers and service providers review the demand growth.
2. The report helps system providers understand the market's pulse and provides insights into drivers, restraints, opportunities, and challenges.
3. The report will help key players understand their competitors' strategies better and help them make better strategic decisions.

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(Business overview, Products/solutions/services offered, Recent Developments, MNM view)*

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*Details on Business overview, Products/solutions/services offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

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12.4 AVAILABLE CUSTOMIZATIONS

12.5 RELATED REPORTS

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