

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

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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.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS AND EXCLUSIONS

1.3.1 ROTARY UPS MARKET: INCLUSIONS AND EXCLUSIONS

TABLE 1 ROTARY UPS MARKET, BY TYPE: INCLUSIONS AND EXCLUSIONS

TABLE 2 ROTARY UPS MARKET, BY POWER RATING: INCLUSIONS AND EXCLUSIONS

TABLE 3 ROTARY UPS MARKET, BY APPLICATION: INCLUSIONS AND EXCLUSIONS

1.4 MARKET SCOPE

1.4.1 MARKETS COVERED

1.4.2 GEOGRAPHIC SCOPE

1.4.3 YEARS CONSIDERED

1.5 CURRENCY

1.6 LIMITATIONS

1.7 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 ROTARY UPS MARKET: RESEARCH DESIGN

2.2 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 2 DATA TRIANGULATION METHODOLOGY

2.2.1 SECONDARY DATA

2.2.1.1 Key data from secondary sources

2.2.2 PRIMARY DATA

2.2.2.1 Key data from primary sources

2.2.2.2 Breakdown of primaries

2.2.2.3 Rotary UPS market: Players/companies connected

2.3 SCOPE

2.4 IMPACT OF COVID-19 ON INDUSTRIES

2.5 MARKET SIZE ESTIMATION

2.5.1 BOTTOM-UP APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.5.2 TOP-DOWN APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH**2.5.3 DEMAND-SIDE ANALYSIS****FIGURE 5 MAIN METRICS CONSIDERED WHILE CONSTRUCTING AND ASSESSING DEMAND FOR ROTARY UPS****2.5.3.1 Calculation for regional market size****2.5.3.2 Assumptions for demand-side analysis****2.5.4 SUPPLY-SIDE ANALYSIS****FIGURE 6 MAIN METRICS CONSIDERED WHILE ASSESSING SUPPLY OF ROTARY UPS****FIGURE 7 ROTARY UPS MARKET: SUPPLY-SIDE ANALYSIS****2.5.4.1 Calculations for supply-side analysis****2.5.4.2 Assumptions while calculating supply-side market size****2.5.5 FORECAST****3 EXECUTIVE SUMMARY****TABLE 4 ROTARY UPS MARKET SNAPSHOT****FIGURE 8 DIESEL SEGMENT TO CONTINUE TO ACCOUNT FOR LARGEST SIZE OF ROTARY UPS MARKET, BY TYPE, DURING FORECAST PERIOD****FIGURE 9 ABOVE 2500 KVA SEGMENT, BY POWER RATING, TO DOMINATE ROTARY UPS MARKET BY 2026****FIGURE 10 DATA CENTER TO CONTINUE TO ACCOUNT FOR LARGEST SIZE OF ROTARY UPS MARKET, BY APPLICATION, THROUGHOUT FORECAST PERIOD****FIGURE 11 ASIA PACIFIC TO EXHIBIT HIGHEST CAGR IN ROTARY UPS MARKET DURING 2021–2026****4 PREMIUM INSIGHTS****4.1 ATTRACTIVE OPPORTUNITIES IN ROTARY UPS MARKET****FIGURE 12 INCREASING INVESTMENTS IN DATA CENTERS AND THRIVING IT & TELECOMMUNICATIONS SECTOR EXPECTED TO DRIVE ROTARY UPS MARKET GROWTH DURING 2021–2026****4.2 ROTARY UPS MARKET, BY REGION****FIGURE 13 ROTARY UPS MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD****4.3 ROTARY UPS MARKET, BY TYPE****FIGURE 14 DIESEL SEGMENT HELD LARGEST SHARE OF ROTARY UPS MARKET IN 2020****4.4 ROTARY UPS MARKET, BY POWER RATING**

FIGURE 15 ABOVE 2500 KVA SEGMENT HELD LARGEST SHARE OF ROTARY UPS MARKET IN 2020

4.5 ROTARY UPS MARKET, BY APPLICATION

FIGURE 16 DATA CENTER HELD LARGEST SHARE OF ROTARY UPS MARKET IN 2020

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 COVID-19 HEALTH ASSESSMENT

FIGURE 17 COVID-19 GLOBAL PROPAGATION

FIGURE 18 COVID-19 PROPAGATION IN SELECTED COUNTRIES

5.3 GLOBAL ROAD TO RECOVERY FROM COVID-19

FIGURE 19 GLOBAL RECOVERY ROAD FROM COVID-19 FROM 2020 TO 2021

5.4 COVID-19 ECONOMIC ASSESSMENT

FIGURE 20 REVISED GDP FORECASTS FOR SELECT G20 COUNTRIES IN 2020

5.5 MARKET DYNAMICS

FIGURE 21 ROTARY UPS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.5.1 DRIVERS

5.5.1.1 Growing need for zero downtime power supply solutions for critical power applications

FIGURE 22 GLOBAL ELECTRICITY DEMAND, BY SECTOR, 2018–2040 (THOUSAND TWH)

5.5.1.2 High efficiency, fewer space requirements, and low lifetime costs of rotary UPS

5.5.2 RESTRAINTS

5.5.2.1 Declining battery costs and improved battery energy density

FIGURE 23 LI-ION BATTERY VOLUME WEIGHTED AVERAGE PRICE, 2013–2030 (2020 REAL USD/KWH)

5.5.2.2 Increasing restrictions on use of diesel and fossil fuels in rotary UPS

5.5.3 OPPORTUNITIES

5.5.3.1 Growing digitalization fueled by recent COVID-19 crisis

5.5.3.2 Rising investments in hyperscale data centers by colocation and cloud service providers

5.5.4 CHALLENGES

5.5.4.1 Rotary UPS supply chain disruptions due to COVID-19

5.6 YC-SHIFT

5.6.1 REVENUE SHIFT AND NEW REVENUE POCKETS

FIGURE 24 REVENUE SHIFT FOR ROTARY UPS

5.7 MARKET MAP

FIGURE 25 MARKET MAP FOR ROTARY UPS

5.8 AVERAGE SELLING PRICE TREND

FIGURE 26 AVERAGE SELLING PRICE OF DIESEL ROTARY UPS

5.9 SUPPLY CHAIN ANALYSIS

FIGURE 27 ROTARY UPS SUPPLY CHAIN ANALYSIS

5.9.1 RAW MATERIAL SUPPLIERS

5.9.2 MANUFACTURERS

5.9.3 SYSTEM INTEGRATORS AND DISTRIBUTORS

5.9.4 END USERS

TABLE 5 ROTARY UPS MARKET: SUPPLY CHAIN

5.10 TECHNOLOGY ANALYSIS

FIGURE 28 DIESEL ROTARY UPS LINE DIAGRAM

5.11 ROTARY UPS MARKET: TARIFFS AND REGULATIONS

5.12 CASE STUDY ANALYSIS

5.12.1 USE OF ROTARY UPS BY TOULOUSE-BLAGNAC AIRPORT IN FRANCE
FOR CRITICAL POWER SOLUTIONS, FEBRUARY 2021

5.12.1.1 Problem statement

5.12.1.2 Solution

5.12.2 USE OF ROTARY UPS FOR BBC'S NEW HEADQUARTERS IN WALES
FOR CRITICAL LOADS, OCTOBER 2020

5.12.2.1 Problem statement

5.12.2.2 Solution

5.13 PORTER'S FIVE FORCES ANALYSIS

TABLE 6 ROTARY UPS MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 29 PORTER'S FIVE FORCES ANALYSIS

5.13.1 THREAT OF SUBSTITUTES

5.13.2 BARGAINING POWER OF SUPPLIERS

5.13.3 BARGAINING POWER OF BUYERS

5.13.4 THREAT OF NEW ENTRANTS

5.13.5 DEGREE OF COMPETITION

5.14 ALTERNATIVE FUELS FOR DATA CENTER GENERATORS

5.15 UPS CUSTOMER LIST BY INDUSTRY

5.16 COMPANY REGIONAL SALES DATA

6 ROTARY UPS MARKET, BY TYPE

6.1 INTRODUCTION

FIGURE 30 DIESEL TYPE ACCOUNTED FOR LARGEST SHARE OF ROTARY UPS MARKET, IN TERMS OF VALUE, IN 2020

TABLE 7 ROTARY UPS MARKET, BY TYPE, 2019–2026 (USD MILLION)

TABLE 8 ROTARY UPS MARKET, BY TYPE, 2019–2026 (UNITS)

6.2 DIESEL

6.2.1 OLDEST AND MOST POPULAR TYPE OF ROTARY UPS

TABLE 9 DIESEL: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

6.3 HYBRID

6.3.1 OFFERS BEST OF BOTH AS IT HAS COMBINATION OF STATIC AND ROTARY UPS COMPONENTS

TABLE 10 HYBRID: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

6.4 OTHERS

TABLE 11 OTHERS; ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

7 ROTARY UPS MARKET, BY POWER RATING

7.1 INTRODUCTION

FIGURE 31 ABOVE 2500 KVA SEGMENT ACCOUNTED FOR LARGEST SHARE OF ROTARY UPS MARKET, IN TERMS OF VALUE, IN 2020

TABLE 12 ROTARY UPS MARKET, BY POWER RATING, 2019–2026 (USD MILLION)

TABLE 13 ROTARY UPS MARKET, BY POWER RATING, 2019–2026 (UNITS)

7.2 UP TO 1000 KVA

7.2.1 INCREASED DEMAND FOR RELIABLE BACKUP SOLUTIONS IN MANUFACTURING AND SMALL-SCALE APPLICATIONS TO FUEL DEMAND FOR ROTARY UPS

TABLE 14 UP TO 1000 KVA ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.3 1001–2000 KVA

7.3.1 DEMAND FROM EUROPE AND ASIA PACIFIC TO DRIVE MARKET FOR ROTARY UPS IN THIS SEGMENT

TABLE 15 1001 –2000 KVA ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.4 2001–2500 KVA

7.4.1 ADVANTAGES SUCH AS MODULARITY AND SPACE ARE MAJOR DRIVERS FOR MARKET GROWTH

TABLE 16 2001 –2500 KVA ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

7.5 ABOVE 2500 KVA

7.5.1 INCREASING DEMAND FOR ROTARY UPS IN DATA CENTER

APPLICATIONS TO DRIVE MARKET IN THIS SEGMENT

TABLE 17 ABOVE 2500 KVA ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8 ROTARY UPS MARKET, BY APPLICATION

8.1 INTRODUCTION

FIGURE 32 DATA CENTER ACCOUNTED FOR LARGEST SHARE OF ROTARY UPS MARKET, IN TERMS OF VALUE, IN 2020

TABLE 18 ROTARY UPS MARKET, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 19 ROTARY UPS MARKET, BY APPLICATION, 2019–2026 (UNITS)

8.2 AEROSPACE & DEFENSE

8.2.1 RUGGEDNESS AND ROTARY UPS' ABILITY TO OPERATE IN DIVERSE ENVIRONMENTAL CONDITIONS MAKE IT ATTRACTIVE SOLUTION

TABLE 20 AEROSPACE & DEFENSE: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.3 ELECTRONICS & SEMICONDUCTORS

8.3.1 GROWING DEMAND FOR CONSUMER ELECTRONICS IS DRIVING INVESTMENTS IN ELECTRONICS & SEMICONDUCTOR SECTOR

TABLE 21 ELECTRONICS & SEMICONDUCTORS: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.4 MANUFACTURING INDUSTRIES

8.4.1 NEED FOR CONTINUOUS RELIABLE POWER TO AVOID PRODUCTION LOSS IS SINGLE BIGGEST DRIVER FOR ROTARY UPS MARKET

TABLE 22 MANUFACTURING INDUSTRIES: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.5 IT & TELECOMMUNICATIONS

8.5.1 INVESTMENTS IN 5G AND INCREASED DIGITALIZATION ARE EXPECTED TO BE MAJOR DRIVERS FOR ROTARY UPS MARKET IN THIS SEGMENT

TABLE 23 IT & TELECOMMUNICATIONS: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.6 DATA CENTER

8.6.1 INCREASING INVESTMENTS IN LARGE HYPERSCALE DATA CENTERS DRIVE ROTARY UPS MARKET FOR THIS SEGMENT

TABLE 24 DATACENTER: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.7 HEALTHCARE & PHARMACEUTICALS

8.7.1 ONGOING INVESTMENTS IN HEALTHCARE INFRASTRUCTURE AND PHARMACEUTICAL MANUFACTURING ARE EXPECTED TO BOOST MARKET GROWTH

TABLE 25 HEALTHCARE & PHARMACEUTICALS: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

8.8 OTHERS

TABLE 26 OTHERS: ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

9 ROTARY UPS MARKET, GEOGRAPHIC ANALYSIS

9.1 INTRODUCTION

FIGURE 33 REGIONAL SNAPSHOT: MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

FIGURE 34 ROTARY UPS MARKET SHARE (VALUE), BY REGION, 2020

TABLE 27 ROTARY UPS MARKET, BY REGION, 2019–2026 (USD MILLION)

TABLE 28 ROTARY UPS MARKET, BY REGION, 2019–2026 (UNITS)

9.2 EUROPE

FIGURE 35 SNAPSHOT: ROTARY UPS MARKET IN EUROPE

TABLE 29 ROTARY UPS MARKET IN EUROPE, BY POWER RATING, 2019–2026 (USD MILLION)

TABLE 30 ROTARY UPS MARKET IN EUROPE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 31 ROTARY UPS MARKET IN EUROPE, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 32 ROTARY UPS MARKET IN EUROPE, BY COUNTRY, 2019–2026 (USD MILLION)

9.2.1 UK

9.2.1.1 Growing datacenter investments to drive market growth

TABLE 33 ROTARY UPS MARKET IN UK, BY TYPE, 2019–2026 (USD MILLION)

TABLE 34 ROTARY UPS MARKET IN UK, BY APPLICATION, 2019–2026 (USD MILLION)

9.2.2 GERMANY

9.2.2.1 Rising datacenter investments and thriving IT & telecom sector as well as pharmaceutical sectors to boost market growth

TABLE 35 ROTARY UPS MARKET IN GERMANY, BY TYPE, 2019–2026 (USD MILLION)

TABLE 36 ROTARY UPS MARKET IN GERMANY, BY APPLICATION, 2019–2026 (USD MILLION)

9.2.3 RUSSIA

9.2.3.1 Growing investments in data centers to accelerate market growth

TABLE 37 ROTARY UPS MARKET IN RUSSIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 38 ROTARY UPS MARKET IN RUSSIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.2.4 FRANCE

9.2.4.1 Demand for rotary UPS in data center, aerospace, and pharmaceutical applications to drive market

TABLE 39 ROTARY UPS MARKET IN FRANCE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 40 ROTARY UPS MARKET IN FRANCE, BY APPLICATION, 2019–2026 (USD MILLION)

9.2.5 REST OF EUROPE

TABLE 41 ROTARY UPS MARKET IN REST OF EUROPE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 42 ROTARY UPS MARKET IN REST OF EUROPE, BY APPLICATION, 2019–2026 (USD MILLION)

9.3 ASIA PACIFIC

FIGURE 36 SNAPSHOT: ROTARY UPS MARKET IN ASIA PACIFIC

TABLE 43 ROTARY UPS MARKET IN ASIA PACIFIC, BY POWER RATING, 2019–2026 (USD MILLION)

TABLE 44 ROTARY UPS MARKET IN ASIA PACIFIC, BY TYPE, 2019–2026 (USD MILLION)

TABLE 45 ROTARY UPS MARKET IN ASIA PACIFIC, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 46 ROTARY UPS MARKET IN ASIA PACIFIC, BY COUNTRY, 2019–2026 (USD MILLION)

9.3.1 CHINA

9.3.1.1 Planned investments in data centers and thriving electronics & semiconductors sector to support market growth

TABLE 47 ROTARY UPS MARKET IN CHINA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 48 ROTARY UPS MARKET IN CHINA, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.2 AUSTRALIA

9.3.2.1 Data center investments to drive rotary UPS market

TABLE 49 ROTARY UPS MARKET IN AUSTRALIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 50 ROTARY UPS MARKET IN AUSTRALIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.3 JAPAN

9.3.3.1 Japan's manufacturing sector along with data center demand to boost adoption of rotary UPS

TABLE 51 ROTARY UPS MARKET IN JAPAN, BY TYPE, 2019–2026 (USD MILLION)

TABLE 52 ROTARY UPS MARKET IN JAPAN, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.4 INDIA

9.3.4.1 Increasing investments in data centers to surge demand for rotary UPS

TABLE 53 ROTARY UPS MARKET IN INDIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 54 ROTARY UPS MARKET IN INDIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.5 SOUTH KOREA

9.3.5.1 Thriving electronics & semiconductors sector to drive market

TABLE 55 ROTARY UPS MARKET IN SOUTH KOREA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 56 ROTARY UPS MARKET IN SOUTH KOREA, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.6 MALAYSIA

9.3.6.1 Thriving electronics & semiconductor sector to boost market growth

TABLE 57 ROTARY UPS MARKET IN MALAYSIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 58 ROTARY UPS MARKET IN MALAYSIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.7 SINGAPORE

9.3.7.1 Rotary UPS for electronics & semiconductor and datacenter applications to drive market

TABLE 59 ROTARY UPS MARKET IN SINGAPORE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 60 ROTARY UPS MARKET IN SINGAPORE, BY APPLICATION, 2019–2026 (USD MILLION)

9.3.8 REST OF ASIA PACIFIC

TABLE 61 ROTARY UPS MARKET IN REST OF ASIA PACIFIC, BY TYPE, 2019–2026 (USD MILLION)

TABLE 62 ROTARY UPS MARKET IN REST OF ASIA PACIFIC, BY APPLICATION, 2019–2026 (USD MILLION)

9.4 NORTH AMERICA

TABLE 63 ROTARY UPS MARKET IN NORTH AMERICA, BY POWER RATING, 2019–2026 (USD MILLION)

TABLE 64 ROTARY UPS MARKET IN NORTH AMERICA, BY TYPE, 2019–2026 (USD MILLION)

MILLION)

TABLE 65 ROTARY UPS MARKET IN NORTH AMERICA, BY APPLICATION,
2019–2026 (USD MILLION)

TABLE 66 ROTARY UPS MARKET IN NORTH AMERICA, BY COUNTRY, 2019–2026
(USD MILLION)

9.4.1 US

9.4.1.1 Increased military spending and sustained investments in data centers to
accelerate demand for rotary UPS

TABLE 67 ROTARY UPS MARKET IN US, BY TYPE, 2019–2026 (USD MILLION)

TABLE 68 ROTARY UPS MARKET IN US, BY APPLICATION, 2019–2026 (USD
MILLION)

9.4.2 CANADA

9.4.2.1 Government as well as private investments in IT & telecom infrastructure
along with data centers to drive market

TABLE 69 ROTARY UPS MARKET IN CANADA, BY TYPE, 2019–2026 (USD
MILLION)

TABLE 70 ROTARY UPS MARKET IN CANADA, BY APPLICATION, 2019–2026 (USD
MILLION)

9.4.3 MEXICO

9.4.3.1 Planned large-scale investments in IT & telecom as well as data centers to
boost market growth

TABLE 71 ROTARY UPS MARKET IN MEXICO, BY TYPE, 2019–2026 (USD MILLION)

TABLE 72 ROTARY UPS MARKET IN MEXICO, BY APPLICATION, 2019–2026 (USD
MILLION)

9.5 MIDDLE EAST & AFRICA

TABLE 73 ROTARY UPS MARKET IN MIDDLE EAST & AFRICA, BY POWER
RATING, 2019–2026 (USD MILLION)

TABLE 74 ROTARY UPS MARKET IN MIDDLE EAST & AFRICA, BY TYPE,
2019–2026 (USD MILLION)

TABLE 75 ROTARY UPS MARKET IN MIDDLE EAST & AFRICA, BY APPLICATION,
2019–2026 (USD MILLION)

TABLE 76 MIDDLE EAST & AFRICA: ROTARY UPS MARKET, BY COUNTRY,
2019–2026 (USD MILLION)

9.5.1 SAUDI ARABIA

9.5.1.1 Large-scale investments in manufacturing sector and data centers to drive
market for rotary UPS

TABLE 77 ROTARY UPS MARKET IN SAUDI ARABIA, BY TYPE, 2019–2026 (USD
MILLION)

TABLE 78 ROTARY UPS MARKET IN SAUDI ARABIA, BY APPLICATION, 2019–2026

(USD MILLION)

9.5.2 UAE

9.5.2.1 Planned investments in IT & telecom to boost market growth

TABLE 79 ROTARY UPS MARKET THE UAE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 80 ROTARY UPS MARKET IN THE UAE, BY APPLICATION, 2019–2026 (USD MILLION)

9.5.3 SOUTH AFRICA

9.5.3.1 Rotary UPS find applications in data centers and manufacturing industries

TABLE 81 ROTARY UPS MARKET IN SOUTH AFRICA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 82 ROTARY UPS MARKET IN SOUTH AFRICA, BY APPLICATION, 2019–2026 (USD MILLION)

9.5.4 NIGERIA

9.5.4.1 Rotary UPS finds application in data centers and manufacturing industries

TABLE 83 ROTARY UPS MARKET IN NIGERIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 84 ROTARY UPS MARKET IN NIGERIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.5.5 ALGERIA

9.5.5.1 Investments in country's manufacturing industries are expected to propel market growth

TABLE 85 ROTARY UPS MARKET IN ALGERIA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 86 ROTARY UPS MARKET IN ALGERIA, BY APPLICATION, 2019–2026 (USD MILLION)

9.5.6 REST OF MIDDLE EAST & AFRICA

TABLE 87 ROTARY UPS MARKET IN REST OF MIDDLE EAST & AFRICA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 88 ROTARY UPS MARKET IN REST OF MIDDLE EAST & AFRICA, BY APPLICATION, 2019–2026 (USD MILLION)

9.6 SOUTH AMERICA

TABLE 89 ROTARY UPS MARKET IN SOUTH AMERICA, BY POWER RATING, 2019–2026 (USD MILLION)

TABLE 90 ROTARY UPS MARKET IN SOUTH AMERICA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 91 ROTARY UPS MARKET IN SOUTH AMERICA, BY APPLICATION, 2019–2026 (USD MILLION)

TABLE 92 ROTARY UPS MARKET IN SOUTH AMERICA, BY COUNTRY, 2019–2026 (USD MILLION)

9.6.1 BRAZIL

9.6.1.1 Increased investments in data centers to drive market

TABLE 93 ROTARY UPS MARKET IN BRAZIL, BY TYPE, 2019–2026 (USD MILLION)

TABLE 94 ROTARY UPS MARKET IN BRAZIL, BY APPLICATION, 2019–2026 (USD MILLION)

9.6.2 ARGENTINA

9.6.2.1 Large-scale power outages and increased naval budget to accelerate market growth

TABLE 95 ROTARY UPS MARKET IN ARGENTINA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 96 ROTARY UPS MARKET IN ARGENTINA, BY APPLICATION, 2019–2026 (USD MILLION)

9.6.3 REST OF SOUTH AMERICA

TABLE 97 ROTARY UPS MARKET IN REST OF SOUTH AMERICA, BY TYPE, 2019–2026 (USD MILLION)

TABLE 98 ROTARY UPS MARKET IN REST OF SOUTH AMERICA, BY APPLICATION, 2019–2026 (USD MILLION)

10 COMPETITIVE LANDSCAPE

10.1 OVERVIEW

FIGURE 37 KEY DEVELOPMENTS IN ROTARY UPS MARKET DURING 2018–2020

10.2 MARKET SHARE ANALYSIS

TABLE 99 ROTARY UPS MARKET: DEGREE OF COMPETITION

FIGURE 38 LEADING PLAYERS IN ROTARY UPS MARKET

10.3 MARKET EVALUATION FRAMEWORK

TABLE 100 MARKET EVALUATION FRAMEWORK

10.4 COMPETITIVE SCENARIO

TABLE 101 ROTARY UPS MARKET: PRODUCT LAUNCHES, JANUARY 2018–FEBRUARY 2021

TABLE 102 ROTARY UPS MARKET: DEALS, JANUARY 2018–FEBRUARY 2021

10.5 COMPANY EVALUATION QUADRANT

10.5.1 STAR

10.5.2 EMERGING LEADER

10.5.3 PERVASIVE

10.5.4 PARTICIPANT

FIGURE 39 COMPETITIVE LEADERSHIP MAPPING: ROTARY UPS MARKET, 2020

10.5.5 PRODUCT FOOTPRINT

TABLE 103 COMPANY PRODUCT FOOTPRINT

TABLE 104 COMPANY APPLICATION FOOTPRINT
TABLE 105 COMPANY PRODUCT RATING FOOTPRINT
TABLE 106 COMPANY REGION FOOTPRINT

11 COMPANY PROFILES

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

11.1 KEY PLAYERS

11.1.1 PILLER POWER SYSTEMS

TABLE 107 PILLER POWER SYSTEMS: BUSINESS OVERVIEW
FIGURE 40 PILLER POWER SYSTEMS: COMPANY SNAPSHOT
TABLE 108 PILLER POWER SYSTEMS: PRODUCTS OFFERED

11.1.2 HITEC HOLDING

TABLE 109 HITEC HOLDING: BUSINESS OVERVIEW
TABLE 110 HITEC HOLDING: PRODUCTS OFFERED

11.1.3 ROLLS-ROYCE HOLDINGS

TABLE 111 ROLLS-ROYCE HOLDINGS: BUSINESS OVERVIEW
FIGURE 41 ROLLS-ROYCE HOLDINGS: COMPANY SNAPSHOT
TABLE 112 ROLLS-ROYCE HOLDINGS: PRODUCTS OFFERED

11.1.4 HITZINGER

TABLE 113 HITZINGER: BUSINESS OVERVIEW
TABLE 114 HITZINGER: PRODUCTS OFFERED

11.1.5 IEM POWER SYSTEMS

TABLE 115 IEM POWER SYSTEMS: BUSINESS OVERVIEW
TABLE 116 IEM POWER SYSTEMS: PRODUCTS OFFERED

11.1.6 POWER SYSTEMS & CONTROL

TABLE 117 POWER SYSTEMS & CONTROL: BUSINESS OVERVIEW
TABLE 118 POWER SYSTEMS & CONTROL: PRODUCTS OFFERED

11.1.7 ABB

TABLE 119 ABB: BUSINESS OVERVIEW
FIGURE 42 ABB: COMPANY SNAPSHOT
TABLE 120 ABB: PRODUCTS OFFERED

11.1.8 VYCON

TABLE 121 VYCON: BUSINESS OVERVIEW
TABLE 122 VYCON: PRODUCTS OFFERED

11.1.9 THYCON

TABLE 123 THYCON: BUSINESS OVERVIEW
TABLE 124 THYCON: PRODUCTS OFFERED

11.1.10 POWERTHRU

TABLE 125 POWERTHRU: BUSINESS OVERVIEW

TABLE 126 POWERTHRU: PRODUCTS OFFERED

11.1.11 AUSONIA

TABLE 127 AUSONIA: BUSINESS OVERVIEW

TABLE 128 AUSONIA: PRODUCTS OFFERED

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

12 APPENDIX

12.1 INSIGHTS OF INDUSTRY EXPERTS

12.2 DISCUSSION GUIDE

12.3 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

12.4 AVAILABLE CUSTOMIZATIONS

12.5 RELATED REPORTS

12.6 AUTHOR DETAILS

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