

# **Industrial Power System Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Types (AC-DC Converters and DC-DC Converters), By Output Power (Very Low Output (Up to 500 W), Low Output (500W-1,000W), Medium Output (1,000W-10kW), High Output (10-75kW), Very High Output (75?150kW)), By Verticals (Transportation, Semiconductor, Military & Aerospace, Robotics, Test & Measurement, Industrial 3D Printing, Battery Charging & Test, Others), By Region, By Competition**

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## **Abstracts**

Global Industrial Power System Market has valued at USD 13.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.19% through 2028.

The global Industrial Power System market encompasses the entire industry dedicated to providing essential power solutions tailored specifically for industrial applications. It comprises the design, production, distribution, installation, and maintenance of a wide range of power-related equipment and systems used in industrial settings. Industrial Power Systems are designed to meet the unique demands of industrial facilities, including manufacturing plants, factories, data centers, refineries, and more. These systems include components such as generators, transformers, switchgear, distribution panels, voltage regulators, and control systems, among others. Key facets of the global Industrial Power System market include power generation from various sources,

efficient distribution, advanced control and monitoring, energy efficiency solutions, integration of renewable energy sources, cybersecurity measures, and adherence to regulatory standards. This market plays a pivotal role in ensuring reliable and uninterrupted power supply for industrial processes, supporting automation, and fostering sustainability. Continuously evolving to meet modern industrial needs, the Industrial Power System market is at the forefront of technological innovation and sustainability, serving as a cornerstone for industries worldwide.

## Key Market Drivers

### Increasing Energy Consumption and Urbanization:

The relentless pace of urbanization and the surging global population have propelled energy consumption to unprecedented levels. Urban areas are the epicenters of industrial activities, commercial complexes, and residential communities, all of which demand consistent and reliable power. The Industrial Power System market is driven by this ever-increasing demand for energy. With the rapid growth of mega-cities and industrial hubs, the pressure on power infrastructure has never been greater. To address this challenge, industries require robust and adaptable power systems that can efficiently distribute electricity, minimize transmission losses, and ensure uninterrupted power supply. Consequently, manufacturers in the Industrial Power System sector are constantly innovating to meet these needs.

### Transition to Renewable Energy:

One of the most profound shifts in the global energy landscape is the transition to renewable energy sources. Governments and industries worldwide are committed to reducing greenhouse gas emissions and mitigating climate change. This commitment has led to a surge in the adoption of solar, wind, and hydroelectric power generation. Industrial Power Systems are integral to facilitating this transition. They must adapt to accommodate intermittent renewable sources, manage power fluctuations, and optimize energy distribution. This transition has created a significant market driver as industries invest in systems that seamlessly integrate renewable energy into their operations, thereby reducing their environmental footprint.

### Industry 4.0 and Automation:

The emergence of Industry 4.0, characterized by the convergence of digital technologies with traditional industries, has fundamentally transformed manufacturing

and industrial processes. Smart factories and automation are becoming the norm, and these advancements rely heavily on sophisticated Industrial Power Systems. These systems must support a myriad of devices, machinery, robotics, and sensors while maintaining precise control over voltage and power quality. As industries strive for increased efficiency and reduced downtime, the Industrial Power System market is driven by the need for advanced solutions that can handle the demands of this new industrial era.

#### Grid Modernization:

Many regions worldwide are grappling with aging power infrastructures. The necessity for grid modernization has never been more evident. This includes the replacement of outdated components, the infusion of smart grid technologies, and the expansion of digitalization across the power sector. Modernizing the grid enhances the reliability and efficiency of Industrial Power Systems. These systems must adapt to changing grid dynamics and incorporate real-time data to optimize power distribution. The drive for grid modernization is a powerful force pushing the Industrial Power System market forward.

#### Energy Storage Solutions:

Energy storage solutions are becoming increasingly integral to Industrial Power Systems. Battery technologies, in particular, are playing a crucial role in balancing supply and demand, storing excess energy during low-demand periods, and releasing it when needed. This is vital as industries seek to reduce energy costs and improve grid resilience. The Industrial Power System market is, therefore, driven by the demand for advanced energy storage solutions that enhance the overall efficiency and stability of power distribution.

#### Environmental Regulations and Sustainability Goals:

Governments worldwide are implementing stringent environmental regulations and setting ambitious sustainability targets. Industries are under immense pressure to reduce their carbon footprint and minimize their impact on the environment. In response, the Industrial Power System market is witnessing a surge in environmentally friendly technologies. These include energy-efficient transformers, power factor correction, and energy management systems. Meeting environmental regulations and sustainability goals has become a powerful driver for innovation in the Industrial Power System sector.

In conclusion, the global Industrial Power System market is propelled by these six key drivers: increasing energy consumption and urbanization, the transition to renewable energy, Industry 4.0 and automation, grid modernization, energy storage solutions, and the imperative to meet stringent environmental regulations and sustainability goals. These drivers are shaping the industry, fostering innovation, and driving the adoption of advanced power systems worldwide.

## Government Policies are Likely to Propel the Market

### Renewable Energy Mandates and Subsidies:

Governments worldwide are increasingly recognizing the importance of transitioning to renewable energy sources to combat climate change and reduce greenhouse gas emissions. To incentivize this shift, many countries have implemented renewable energy mandates and subsidies. Renewable energy mandates require a certain percentage of energy generation to come from renewable sources, such as wind, solar, and hydroelectric power. These mandates drive the adoption of renewable energy technologies and, consequently, the development of Industrial Power Systems that can efficiently integrate these intermittent sources into the grid. Additionally, governments often offer financial incentives, tax credits, and subsidies to promote renewable energy projects. These policies create a robust market for Industrial Power Systems that support the integration of clean energy into the existing power infrastructure.

### Grid Modernization Initiatives:

Aging and inefficient power grids pose significant challenges to the reliability and stability of electrical supply. In response, governments have launched grid modernization initiatives to enhance grid resilience and efficiency. These initiatives involve updating infrastructure, incorporating smart grid technologies, and digitalizing grid operations. Advanced Industrial Power Systems play a pivotal role in supporting these initiatives by providing the necessary control and monitoring capabilities to optimize power distribution. Through investments and regulatory support for grid modernization, governments stimulate the growth of the Industrial Power System market, ensuring that the power infrastructure can meet the demands of the modern world.

### Energy Efficiency Standards and Regulations:

Governments are increasingly focused on energy conservation and efficiency to reduce energy consumption and carbon emissions. To this end, they implement energy efficiency standards and regulations that apply to various sectors, including industrial operations. These standards often require industries to adopt energy-efficient technologies and practices, such as the use of energy-efficient motors, variable frequency drives, and power factor correction systems. Industrial Power Systems must align with these standards to help industries achieve compliance while minimizing energy wastage. By enacting and enforcing energy efficiency regulations, governments drive the demand for Industrial Power Systems that facilitate energy conservation and promote sustainable industrial practices.

#### Emission Reduction Targets:

To meet international climate goals, governments establish emission reduction targets and regulations that apply to industries across the board. These targets aim to limit the release of greenhouse gases and pollutants. Industrial Power Systems play a crucial role in helping industries reduce their emissions by optimizing energy usage, reducing transmission losses, and supporting the integration of renewable energy sources. Governments incentivize industries to adopt these systems through emissions trading schemes, carbon pricing mechanisms, and tax incentives for green technologies. As a result, the Industrial Power System market thrives on the demand created by industries seeking to align with emission reduction targets and regulations.

#### Energy Security Measures:

Governments prioritize energy security to ensure a stable and uninterrupted power supply for their citizens and industries. To achieve this, they implement policies that encourage the development of resilient energy infrastructure. These policies may include incentives for backup power systems, investments in grid resilience, and regulations that require critical infrastructure facilities to have redundant power sources. Industrial Power Systems that offer reliability and backup capabilities become essential components of these energy security measures. The government's commitment to energy security serves as a driving force behind the adoption of robust Industrial Power Systems that can withstand disruptions and ensure continuous power supply.

#### Research and Development Grants:

To promote innovation and technological advancements in the Industrial Power System sector, governments often offer research and development (R&D) grants and subsidies.

These financial incentives encourage companies to invest in the development of cutting-edge technologies and solutions. R&D grants support projects related to grid optimization, energy storage, power quality improvement, and the integration of advanced sensors and control systems. By providing funding for such endeavors, governments foster a culture of innovation in the Industrial Power System market, leading to the creation of more efficient and sustainable power solutions. In conclusion, government policies are instrumental in shaping the global Industrial Power System market. Renewable energy mandates, grid modernization initiatives, energy efficiency standards, emission reduction targets, energy security measures, and research and development grants collectively drive the growth and evolution of the industry. These policies underscore the critical role that Industrial Power Systems play in achieving energy sustainability and environmental goals.

## Key Market Challenges

### Aging Infrastructure and Legacy Systems:

One of the foremost challenges confronting the global Industrial Power System market is the prevalence of aging infrastructure and legacy systems. Many countries and industries rely on power grids and electrical systems that were established decades ago, and these systems often struggle to meet the demands of modern industrial operations.

**Aging Infrastructure:** The power infrastructure in numerous regions has exceeded its intended lifespan, resulting in increased maintenance requirements and a higher likelihood of failures and outages. Aging components, such as transformers, circuit breakers, and substations, are more susceptible to breakdowns, leading to costly downtime for industries. Replacing and upgrading this aging infrastructure requires significant investment, but the financial burden and logistical complexity can deter progress.

**Legacy Systems:** Industrial facilities often operate with legacy control and monitoring systems that lack the flexibility and adaptability needed to optimize power distribution in today's dynamic environment. These outdated systems can hinder the integration of renewable energy sources, impede grid modernization efforts, and limit the implementation of energy-efficient technologies.

Addressing the challenge of aging infrastructure and legacy systems requires substantial investment, careful planning, and a commitment to long-term sustainability.

Governments, industries, and utility providers must collaborate to modernize power systems and transition to more resilient and efficient Industrial Power Systems.

#### Cybersecurity Vulnerabilities:

As Industrial Power Systems become increasingly interconnected and digitized, they face a growing threat from cybersecurity vulnerabilities. The convergence of operational technology (OT) with information technology (IT) has created new entry points for cyberattacks, and the consequences of a successful attack on an industrial power system can be severe.

**Ransomware and Disruption:** Cyberattacks, such as ransomware, have the potential to disrupt power generation and distribution, causing widespread outages and economic losses. Attackers may exploit vulnerabilities in the control systems, gain unauthorized access, and demand ransom payments to restore control. Such incidents not only disrupt industrial operations but also pose risks to public safety.

**Data Breaches and Intellectual Property Theft:** Industrial Power Systems generate and rely on vast amounts of data for efficient operation. Cyberattacks can lead to data breaches, exposing sensitive information about power systems and industrial processes. Additionally, intellectual property theft can result in the compromise of proprietary technologies and designs, undermining competitiveness and innovation.

Addressing cybersecurity vulnerabilities in the Industrial Power System market is a multifaceted challenge. It requires ongoing investment in robust cybersecurity measures, employee training, and the development of secure communication protocols. Collaboration between government agencies, industry stakeholders, and cybersecurity experts is essential to establish and enforce standards that mitigate these risks effectively.

In conclusion, the global Industrial Power System market faces challenges related to aging infrastructure and legacy systems, as well as cybersecurity vulnerabilities. Both challenges require comprehensive strategies and investments to ensure the reliability, resilience, and security of industrial power systems in an evolving technological landscape. Tackling these challenges will be crucial for the continued growth and sustainability of the industrial power sector.

#### Segmental Insights

## AC-DC Converters Insights

The AC-DC Converters segment had the largest market share in 2022 & expected to maintain it in the forecast period. AC-DC converters are essential for industries that primarily rely on grid power, which is typically supplied in the form of alternating current (AC). The majority of industrial facilities around the world are connected to the AC grid, making AC-DC converters crucial for converting grid AC power into the direct current (DC) needed for various industrial applications. AC-DC converters find extensive use in a wide range of industries, including manufacturing, commercial, residential, and institutional sectors. They are essential for powering electronic devices, machinery, appliances, lighting systems, and other equipment commonly used in industrial settings. Industries often require high-power solutions for their operations. AC-DC converters are capable of handling high voltage and current levels, making them suitable for industrial applications with substantial power demands. They ensure a stable and reliable power supply for critical operations. Many industrial facilities have already invested in AC-based electrical systems and infrastructure. AC-DC converters seamlessly integrate with these existing setups, allowing industries to leverage their current infrastructure while enhancing energy efficiency and control. Modern AC-DC converters are designed for high energy efficiency, minimizing energy losses during the conversion process. Energy efficiency is a critical concern for industries seeking to reduce operational costs and environmental impact. AC-DC converters help industries maintain operational resilience, as they can ensure a stable power supply even in the face of grid disturbances, fluctuations, or outages. This reliability is crucial for industries that cannot afford downtime or disruptions. AC power is the global standard for electricity distribution, and many regulatory standards and safety protocols are designed around AC systems. AC-DC converters allow industries to adhere to these standards while efficiently converting power for their specific needs. AC-DC converters provide precise voltage control, which is essential for various industrial processes and equipment. This level of control ensures that the voltage supplied to critical machinery and devices remains within specified tolerances.

## Semiconductor Insights

The Semiconductor segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Semiconductor manufacturing processes are highly sensitive to voltage fluctuations and power quality. The production of integrated circuits (ICs) and microchips requires an extremely stable and precise



power supply. Industrial Power Systems that offer accurate voltage control and minimal power disturbances are essential for maintaining the quality and yield of semiconductor fabrication processes. Semiconductor manufacturing facilities are known for their high energy consumption due to the complex machinery and equipment involved in the production process. Ensuring energy efficiency and minimizing power wastage are critical for cost control and sustainability. Advanced Industrial Power Systems are designed to optimize energy usage, reduce losses, and lower operational costs. Semiconductor fabs (fabrication facilities) often operate around the clock to meet global demand for electronics. Any power interruption or equipment failure can result in substantial financial losses. Industrial Power Systems are engineered to provide uninterrupted and reliable power, minimizing downtime and production losses in these critical facilities. Semiconductor manufacturing is subject to strict safety and environmental regulations. Industrial Power Systems must comply with these regulations to ensure a safe working environment and minimize environmental impact. Compliance with safety and environmental standards is a top priority in the semiconductor industry. The semiconductor sector is at the forefront of technological innovation. Research and development efforts constantly push the boundaries of semiconductor technology, requiring advanced testing and measurement equipment. Industrial Power Systems play a crucial role in providing stable power for R&D laboratories and cleanroom environments where experiments and prototyping occur. The semiconductor industry is an integral part of the global supply chain for electronics. The demand for semiconductors spans across various sectors, including consumer electronics, automotive, aerospace, and telecommunications. Ensuring a stable supply of semiconductors relies on the continuous operation of semiconductor fabs, which, in turn, relies on dependable Industrial Power Systems. Semiconductor manufacturers invest significantly in power infrastructure to meet their specific requirements. This includes backup power systems, voltage stabilization equipment, and advanced power distribution systems. These investments drive the demand for tailored Industrial Power Systems.

## Regional Insights

### Asia Pacific:

The Asia Pacific region had the largest market for industrial power systems in 2022. The growth of the market in this region is driven by the rapid growth of the industrial sector, especially in China, India, and Japan. The increasing demand for energy-efficient

devices in the industrial sector is also contributing to the growth of the market in this region.

North America:

North America had the second-largest market for industrial power systems in 2022. The growth of the market in this region is driven by the increasing demand for automation and control systems in the manufacturing sector. The growing adoption of renewable energy sources, such as solar and wind power, is also contributing to the growth of the market in this region.

Europe:

The European market for industrial power systems is estimated to grow at a high CAGR of during the forecast period. The growth of the market in this region is driven by the increasing demand for energy-efficient devices in the industrial sector. The growing adoption of smart grid technologies is also contributing to the growth of the market in this region.

Key Market Players

ABB Ltd

Siemens AG

Delta Electronics, Inc

Schneider Electric SE

Emerson Electric Co.

General Electric Company

Murata Power Solutions Inc

TDK-Lambda Corporation

Bel Fuse Inc

## Advanced Energy Industries, Inc

### Report Scope:

In this report, the Global Industrial Power System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Industrial Power System Market, By Product Types:

AC-DC Converters

DC-DC Converters

#### Industrial Power System Market, By Output Power:

Very Low Output (Up to 500 W)

Low Output (500W-1,000W)

Medium Output (1,000W-10kW)

High Output (10-75kW)

Very High Output (75-150kW)

#### Industrial Power System Market, By Verticals:

Transportation

Semiconductor

Military & Aerospace

Robotics

Test & Measurement

Industrial 3D Printing

Battery Charging & Test

Others

### Industrial Power System Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

## Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Industrial Power System Market.

## Available Customizations:

Global Industrial Power System market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study

### **2. KEY MARKET SEGMENTATIONS**

### **3. RESEARCH METHODOLOGY**

- 3.1. Objective of the Study
- 3.2. Baseline Methodology
- 3.3. Formulation of the Scope
- 3.4. Assumptions and Limitations
- 3.5. Sources of Research
  - 3.5.1. Secondary Research
  - 3.5.2. Primary Research
- 3.6. Approach for the Market Study
  - 3.6.1. The Bottom-Up Approach
  - 3.6.2. The Top-Down Approach
- 3.7. Methodology Followed for Calculation of Market Size & Market Shares
- 3.8. Forecasting Methodology
  - 3.8.1. Data Triangulation & Validation

### **4. EXECUTIVE SUMMARY**

### **5. VOICE OF CUSTOMER**

### **6. GLOBAL INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Product Types (AC-DC Converters and DC-DC Converters),
  - 6.2.2. By Output Power (Very Low Output (Up to 500 W), Low Output (500W-1,000W), Medium Output (1,000W-10kW), High Output (10-75kW), Very High Output

(75?150kW)),

6.2.3. By Verticals (Transportation, Semiconductor, Military & Aerospace, Robotics, Test & Measurement, Industrial 3D Printing, Battery Charging & Test, Others)

6.2.4. By Region

6.2.5. By Company (2022)

6.3. Market Map

## **7. NORTH AMERICA INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product Types

7.2.2. By Output Power

7.2.3. By Verticals

7.2.4. By Country

7.3. North America: Country Analysis

7.3.1. United States Industrial Power System Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product Types

7.3.1.2.2. By Output Power

7.3.1.2.3. By Verticals

7.3.2. Canada Industrial Power System Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product Types

7.3.2.2.2. By Output Power

7.3.2.2.3. By Verticals

7.3.3. Mexico Industrial Power System Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product Types

7.3.3.2.2. By Output Power

7.3.3.2.3. By Verticals

## **8. EUROPE INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Product Types

#### 8.2.2. By Output Power

#### 8.2.3. By Verticals

#### 8.2.4. By Country

### 8.3. Europe: Country Analysis

#### 8.3.1. Germany Industrial Power System Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Product Types

###### 8.3.1.2.2. By Output Power

###### 8.3.1.2.3. By Verticals

#### 8.3.2. United Kingdom Industrial Power System Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Product Types

###### 8.3.2.2.2. By Output Power

###### 8.3.2.2.3. By Verticals

#### 8.3.3. Italy Industrial Power System Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Product Types

###### 8.3.3.2.2. By Output Power

###### 8.3.3.2.3. By Verticals

#### 8.3.4. France Industrial Power System Market Outlook

##### 8.3.4.1. Market Size & Forecast

###### 8.3.4.1.1. By Value

##### 8.3.4.2. Market Share & Forecast

###### 8.3.4.2.1. By Product Types

###### 8.3.4.2.2. By Output Power

###### 8.3.4.2.3. By Verticals

#### 8.3.5. Spain Industrial Power System Market Outlook



#### 8.3.5.1. Market Size & Forecast

##### 8.3.5.1.1. By Value

#### 8.3.5.2. Market Share & Forecast

##### 8.3.5.2.1. By Product Types

##### 8.3.5.2.2. By Output Power

##### 8.3.5.2.3. By Verticals

## **9. ASIA-PACIFIC INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Product Types

#### 9.2.2. By Output Power

#### 9.2.3. By Verticals

#### 9.2.4. By Country

### 9.3. Asia-Pacific: Country Analysis

#### 9.3.1. China Industrial Power System Market Outlook

##### 9.3.1.1. Market Size & Forecast

###### 9.3.1.1.1. By Value

##### 9.3.1.2. Market Share & Forecast

###### 9.3.1.2.1. By Product Types

###### 9.3.1.2.2. By Output Power

###### 9.3.1.2.3. By Verticals

#### 9.3.2. India Industrial Power System Market Outlook

##### 9.3.2.1. Market Size & Forecast

###### 9.3.2.1.1. By Value

##### 9.3.2.2. Market Share & Forecast

###### 9.3.2.2.1. By Product Types

###### 9.3.2.2.2. By Output Power

###### 9.3.2.2.3. By Verticals

#### 9.3.3. Japan Industrial Power System Market Outlook

##### 9.3.3.1. Market Size & Forecast

###### 9.3.3.1.1. By Value

##### 9.3.3.2. Market Share & Forecast

###### 9.3.3.2.1. By Product Types

###### 9.3.3.2.2. By Output Power

###### 9.3.3.2.3. By Verticals

#### 9.3.4. South Korea Industrial Power System Market Outlook

- 9.3.4.1. Market Size & Forecast
  - 9.3.4.1.1. By Value
- 9.3.4.2. Market Share & Forecast
  - 9.3.4.2.1. By Product Types
  - 9.3.4.2.2. By Output Power
  - 9.3.4.2.3. By Verticals
- 9.3.5. Australia Industrial Power System Market Outlook
  - 9.3.5.1. Market Size & Forecast
    - 9.3.5.1.1. By Value
  - 9.3.5.2. Market Share & Forecast
    - 9.3.5.2.1. By Product Types
    - 9.3.5.2.2. By Output Power
    - 9.3.5.2.3. By Verticals

## **10. SOUTH AMERICA INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Product Types
  - 10.2.2. By Output Power
  - 10.2.3. By Verticals
  - 10.2.4. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Industrial Power System Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Product Types
      - 10.3.1.2.2. By Output Power
      - 10.3.1.2.3. By Verticals
  - 10.3.2. Argentina Industrial Power System Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Product Types
      - 10.3.2.2.2. By Output Power
      - 10.3.2.2.3. By Verticals
  - 10.3.3. Colombia Industrial Power System Market Outlook

- 10.3.3.1. Market Size & Forecast
  - 10.3.3.1.1. By Value
- 10.3.3.2. Market Share & Forecast
  - 10.3.3.2.1. By Product Types
  - 10.3.3.2.2. By Output Power
  - 10.3.3.2.3. By Verticals

## **11. MIDDLE EAST AND AFRICA INDUSTRIAL POWER SYSTEM MARKET OUTLOOK**

- 11.1. Market Size & Forecast
  - 11.1.1. By Value
- 11.2. Market Share & Forecast
  - 11.2.1. By Product Types
  - 11.2.2. By Output Power
  - 11.2.3. By Verticals
  - 11.2.4. By Country
- 11.3. MEA: Country Analysis
  - 11.3.1. South Africa Industrial Power System Market Outlook
    - 11.3.1.1. Market Size & Forecast
      - 11.3.1.1.1. By Value
    - 11.3.1.2. Market Share & Forecast
      - 11.3.1.2.1. By Product Types
      - 11.3.1.2.2. By Output Power
      - 11.3.1.2.3. By Verticals
  - 11.3.2. Saudi Arabia Industrial Power System Market Outlook
    - 11.3.2.1. Market Size & Forecast
      - 11.3.2.1.1. By Value
    - 11.3.2.2. Market Share & Forecast
      - 11.3.2.2.1. By Product Types
      - 11.3.2.2.2. By Output Power
      - 11.3.2.2.3. By Verticals
  - 11.3.3. UAE Industrial Power System Market Outlook
    - 11.3.3.1. Market Size & Forecast
      - 11.3.3.1.1. By Value
    - 11.3.3.2. Market Share & Forecast
      - 11.3.3.2.1. By Product Types
      - 11.3.3.2.2. By Output Power
      - 11.3.3.2.3. By Verticals

#### 11.3.4. Kuwait Industrial Power System Market Outlook

##### 11.3.4.1. Market Size & Forecast

###### 11.3.4.1.1. By Value

##### 11.3.4.2. Market Share & Forecast

###### 11.3.4.2.1. By Product Types

###### 11.3.4.2.2. By Output Power

###### 11.3.4.2.3. By Verticals

#### 11.3.5. Turkey Industrial Power System Market Outlook

##### 11.3.5.1. Market Size & Forecast

###### 11.3.5.1.1. By Value

##### 11.3.5.2. Market Share & Forecast

###### 11.3.5.2.1. By Product Types

###### 11.3.5.2.2. By Output Power

###### 11.3.5.2.3. By Verticals

## 12. MARKET DYNAMICS

## 13. MARKET TRENDS & DEVELOPMENTS

## 14. COMPETITIVE LANDSCAPE

### 14.1. ABB Ltd

#### 14.1.1. Business Overview

#### 14.1.2. Key Revenue and Financials

#### 14.1.3. Recent Developments

#### 14.1.4. Key Personnel/Key Contact Person

#### 14.1.5. Key Product/Services Offered

### 14.2. Siemens AG,

#### 14.2.1. Business Overview

#### 14.2.2. Key Revenue and Financials

#### 14.2.3. Recent Developments

#### 14.2.4. Key Personnel/Key Contact Person

#### 14.2.5. Key Product/Services Offered

### 14.3. Delta Electronics, Inc,

#### 14.3.1. Business Overview

#### 14.3.2. Key Revenue and Financials

#### 14.3.3. Recent Developments

#### 14.3.4. Key Personnel/Key Contact Person

#### 14.3.5. Key Product/Services Offered

- 14.4. Schneider Electric SE,
  - 14.4.1. Business Overview
  - 14.4.2. Key Revenue and Financials
  - 14.4.3. Recent Developments
  - 14.4.4. Key Personnel/Key Contact Person
  - 14.4.5. Key Product/Services Offered
- 14.5. Emerson Electric Co.,
  - 14.5.1. Business Overview
  - 14.5.2. Key Revenue and Financials
  - 14.5.3. Recent Developments
  - 14.5.4. Key Personnel/Key Contact Person
  - 14.5.5. Key Product/Services Offered
- 14.6. General Electric Company,
  - 14.6.1. Business Overview
  - 14.6.2. Key Revenue and Financials
  - 14.6.3. Recent Developments
  - 14.6.4. Key Personnel/Key Contact Person
  - 14.6.5. Key Product/Services Offered
- 14.7. Murata Power Solutions Inc,
  - 14.7.1. Business Overview
  - 14.7.2. Key Revenue and Financials
  - 14.7.3. Recent Developments
  - 14.7.4. Key Personnel/Key Contact Person
  - 14.7.5. Key Product/Services Offered
- 14.8. TDK-Lambda Corporation,
  - 14.8.1. Business Overview
  - 14.8.2. Key Revenue and Financials
  - 14.8.3. Recent Developments
  - 14.8.4. Key Personnel/Key Contact Person
  - 14.8.5. Key Product/Services Offered
- 14.9. Bel Fuse Inc,
  - 14.9.1. Business Overview
  - 14.9.2. Key Revenue and Financials
  - 14.9.3. Recent Developments
  - 14.9.4. Key Personnel/Key Contact Person
  - 14.9.5. Key Product/Services Offered
- 14.10. Advanced Energy Industries, Inc
  - 14.10.1. Business Overview
  - 14.10.2. Key Revenue and Financials

- 14.10.3. Recent Developments
- 14.10.4. Key Personnel/Key Contact Person
- 14.10.5. Key Product/Services Offered

## **15. STRATEGIC RECOMMENDATIONS**

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