

Asia Pacific UPS and Inverter Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (UPS and Inverter), UPS Type (Online, Line Interactive, and Standby), Inverter Rating (Less Than 5kW, 5kW to 100 kW, 100kW to 500kW, and Above 500kW), and Application (Industrial, Commercial, and Residential)

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Abstracts

The Asia Pacific UPS (Uninterruptible Power Supply) and inverter market is projected to grow significantly, reaching approximately US\$ 69,557.75 million by 2031, up from US\$ 33,762.09 million in 2024. This growth represents a compound annual growth rate (CAGR) of 11.4% from 2025 to 2031.

Executive Summary and Market Analysis

The market is divided into several key regions, including China, Japan, South Korea, India, Australia, and the Rest of Asia Pacific. In recent years, there has been a notable increase in the demand for UPS systems as reliable backup power sources, particularly to mitigate downtime caused by production line failures or IT equipment disruptions. The surge in demand is largely driven by rapid urbanization, industrialization, and the expansion of data centers, all of which necessitate dependable power solutions.

The Asia Pacific region features a diverse economic landscape, with advanced economies like South Korea and Japan alongside emerging markets such as India and Southeast Asia. This diversity presents significant growth opportunities for

manufacturers of UPS and inverters. For example, India's "Make in India" initiative has spurred the establishment of new manufacturing hubs that rely heavily on UPS systems to ensure uninterrupted productivity during power fluctuations.

Major players in the Asia Pacific UPS and inverter market are innovating to meet the evolving needs of various sectors, including data centers, manufacturing, and healthcare. In 2023, Fuji Electric Co., Ltd. expanded its 7500WX Series of high-capacity UPS systems by launching a new product with a single-unit capacity of 2,400 kVA. The rise of technologies such as Developer Experience (DX), cloud systems, and artificial intelligence (AI) is leading to an increase in the number of data centers being constructed across the region. Fuji Electric provides integrated services that encompass design, construction, and operational support for industrial facilities, ensuring a secure electricity supply while also reducing CO2 emissions.

Countries in the Asia Pacific, particularly Singapore, India, and China, have set ambitious goals to become economic and information-communication hubs, which will further amplify the demand for energy-efficient IT infrastructure, thereby benefiting the UPS and inverter market.

Market Segmentation Analysis

The Asia Pacific UPS and inverter market can be segmented by type and application. In terms of type, the market is divided into UPS and inverters, with the inverter segment holding a larger market share in 2024. The UPS segment is further categorized into online, line-interactive, and standby types. The inverter segment is divided into categories based on capacity: less than 5 kW, 5 kW to 100 kW, 100 kW to 500 kW, and above 500 kW.

By application, the market is segmented into industrial, commercial, and residential sectors, with the industrial segment accounting for the largest share in 2024.

Market Outlook

Data centers are significant consumers of global energy, and their energy usage is expected to rise as demand for data increases. According to 2023 AFL data, data centers account for approximately 3% of total global energy consumption, with hyperscale data centers projected to consume 50% of this energy by 2020. The increasing loads in data centers necessitate the installation of larger UPS systems to support their operations.

Energy-efficient UPS systems are designed to minimize electricity losses and may feature an "eco-mode" that can reduce energy costs by up to 2%. ENERGY STAR-certified UPS systems can decrease energy losses by 30-55% compared to standard models. For instance, a 1000 kVA UPS in a large data center could save around US\$ 18,000 annually. Furthermore, a 15,000-square-foot data center operating at 100 watts per square foot requires about 13,140 megawatt-hours of energy annually for IT equipment. Enhancing the efficiency of UPS systems supplying this power to 90-95% could lead to an annual energy reduction of 768,421 kWh, translating to nearly US\$ 90,000 in savings at a rate of US\$ 0.12 per kWh. Thus, the focus on energy efficiency in data centers is a key driver for the UPS and inverter market.

Country Insights

The Asia Pacific UPS and inverter market includes key countries such as India, China, Japan, South Korea, Australia, and others. China is expected to hold the largest market share in 2024, driven by rapid growth in its digital infrastructure, particularly due to investments in data centers spurred by the rollout of 5G, cloud computing, and AI advancements. Companies like Tencent and Alibaba are developing hyperscale data centers, increasing the demand for high-capacity UPS solutions from brands such as Vertiv and Schneider Electric.

In 2021, Sineng Electric opened a 10-GW PV Inverter Factory in Ningxia, China, reflecting the country's commitment to expanding its renewable energy capacity. According to the National Energy Administration (NEA), China's installed capacity grew by approximately 14.6% in 2024, surpassing 3,348 GW, with significant increases in solar and wind power capacity. This growing emphasis on renewable energy and its integration into various industries is further propelling the UPS and inverter market in China.

Company Profiles

Key players in the Asia Pacific UPS and inverter market include Schneider Electric SE, ABB Ltd, TOSHIBA CORPORATION, Cyber Power Systems (USA) Inc, Eaton Corp Plc, Emerson Electric Co, Delta Electronics Inc, Legrand SA, Kirloskar Electric Company, OMRON Corp, Exide Industries Ltd, Luminous Power Technologies Pvt Ltd, Microtek, Su-Kam Power Systems Ltd., and Kehua Data Co Ltd. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to

consumers.

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