

Europe 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 Europe UPS and inverter market is projected to grow significantly, reaching an estimated US\$ 36,282.37 million by 2031, up from US\$ 18,705.24 million in 2024. This growth represents a compound annual growth rate (CAGR) of 10.5% from 2025 to 2031. The market is primarily segmented into key countries including France, Germany, Italy, Spain, the UK, and the Rest of Europe.

Several factors are driving the demand for UPS (Uninterruptible Power Supply) and inverter systems across Europe. Notably, there is a rising investment in data center infrastructure, rapid urbanization, and an increasing focus on energy efficiency regulations. The European Union (EU) has recently approved a revised Energy Efficiency Directive, part of the "Fit for 55" package, which aims to reduce greenhouse gas emissions by 55% by 2030. This directive mandates EU countries to achieve an average annual energy savings rate of 1.5% from 2024 to 2030, nearly doubling the previous target of 0.8%. By 2030, this requirement will increase to 1.9%, leading to significant energy reductions in both buildings and industries.

In 2024, Microsoft announced a substantial investment of over US\$ 3.5 billion in Germany to enhance its data center capabilities. Similarly, Mercury, a French construction firm, has established the Digital Realty's PAR9 data center in Paris Digital

Park, contributing to the overall development of digital infrastructure. Additionally, Virtus Data Centres is set to launch a new campus in Saunderton, Buckinghamshire (UK), which will feature four data centers with a total IT capacity of 75 MW to meet the growing demand for cloud and AI applications.

The EU is also investing €180 million (approximately US\$ 189.3 million) in advanced digital technologies through the Horizon Europe Programme, which aims to promote collaborative research and development across the region. This initiative focuses on key technologies such as artificial intelligence, robotics, and advanced materials, which are essential for Europe's transition to a more digital, sustainable, and inclusive future. As industries increasingly depend on innovations like AI and robotics, the demand for reliable power systems, including UPS and inverters, becomes critical. The EU's commitment to sustainable and efficient digital transformation is expected to drive significant growth in the UPS and inverter market, as the need for stable, high-performance power solutions rises.

The Europe UPS and inverter market can be analyzed through its segmentation by type and application. The market is divided into UPS and inverter categories, with the inverter segment holding a larger market share in 2024. The UPS segment is further categorized into online, line-interactive, and standby types, while the inverter segment is divided into power capacities: less than 5kW, 5kW to 100kW, 100kW to 500kW, and above 500kW. In terms of application, the market is segmented into industrial, commercial, and residential sectors, with the industrial segment accounting for the largest share in 2024.

Modular UPS systems are revolutionizing how businesses approach power supply solutions. These systems offer flexibility, allowing for easy expansion and adaptation to meet changing power requirements. Built with multiple power modules, modular UPS systems can be swapped, modified, or added to suit customer needs. This flexibility not only makes them cost-effective but also enhances system availability and reliability. Moreover, they tend to be more energy-efficient than traditional centralized UPS systems, leading to lower carbon emissions. As a result, the demand for modular UPS systems is increasing across various industries, including IT, telecom, and manufacturing. For instance, in April 2023, Schneider Electric launched the Easy UPS 3-Phase Modular UPS, designed to protect critical loads while offering third-party verified Live Swap functionality. This system is available in capacities ranging from 50 to 250 kW and supports the EcoStruxure architecture for remote monitoring.

Country-wise, Germany is the largest market for UPS and inverters in Europe as of

2024. The growing demand for renewable energy solutions is driving the need for UPS and inverters to ensure a continuous power supply to the grid. In December 2024, SolarEdge Technologies Inc. announced its first commercial storage system, the 'CSS-OD' battery, specifically designed for the German market. This product integrates seamlessly with SolarEdge's advanced solar inverters and power optimizer technologies, providing an efficient solar and storage solution for commercial businesses. This innovation aligns with the increasing demand for renewable energy solutions in Germany, where the UPS and inverter markets are expanding significantly.

Key players in the Europe 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 such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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