

Uninterruptible Power Supply (Ups) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Global Uninterruptible Power Supply market is expected to reach USD 10.80 billion by the end of the year and is projected to register a CAGR of over 4.44% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently the market has now reached pre-pandemic levels.

Key Highlights

Over the medium term, the rising trend of IoT and smart buildings, a growing number of data centers worldwide, the growing trend of virtualization and cloud computing, and the growing adoption of multi-cloud and network upgrades are also expected to drive the growth of the market studied.

On the other hand, the high cost of online UPS and a few limitations of UPS for protecting heavy appliances from power failure may negatively impact the market's growth and is one of the major restraints for the market.

Nevertheless, Technological advancements in UPS battery systems, such as new lithium-ion (Li-ion) batteries with high operating temperatures, are expected to create immense opportunities in traditional data centers. UPS systems can also be installed as a backup system when the electricity grid fails, are expected to provide growth opportunities in the forecast period.

The Asia-Pacific region dominates the market and is also likely to witness the highest CAGR during the forecast period. The growth is mainly driven by the existing framework of policies supporting the adoption of 5G networks and increasing investments in data center technologies.

Uninterruptible Power Supply (UPS) Market Trends

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Industrial Segment Expected to Dominate the Market

In Industry, the uninterruptible power supplies are used in vast applications, including nuclear power plants, oil rigs, petrochemicals plants, pharmaceutical plants, the food & beverage industry, etc. The industrial uninterruptible power supply systems are installed in rugged environments. As in any industrial setting, the interruption of AC power may cause dangerous process instability or cause expensive damage to processing systems. Furthermore, these environments have a higher ambient temperature and more contamination in the air, so uninterruptible power supply systems are meant to tolerate extreme temperatures and moderate amounts of non-conductive dust.

Uninterruptible power supply is a vital support system to ensure the continued operation of industrial-grade infrastructure. Uninterruptible power supply systems are commonly used to support critical infrastructure during a primary failure. Furthermore, in the case of a short-lived power failure, the industrial-grade uninterruptible power supply can supply the crucial infrastructure with power stored within its battery until the mains power supply is restored. In the event of a significant outage, the uninterruptible power supply could provide power to the critical infrastructure component till time to facilitate the connection of a secondary power generation source such as generators.

Diesel generators are most used for power backup in major industrial applications. However, due to the rise in pollution levels caused by diesel generators, many countries in the world are banning the use of diesel generators. Diesel generators burn diesel and emit carbon dioxide, carbon monoxide, nitrogen oxides (NOx), and particulate matter. For instance, a liter of fuel burned in a diesel generator generates 0.73 kg of pure carbon and 2.6 kg of carbon dioxide. Hence, to reduce air pollution in many industrial applications, companies are using the uninterruptible power supply system for short-term blackouts. The uninterruptible power supply system is often based on lead acid or lithium-ion battery technology. Further, generators don't provide an instant power supply. It needs to be manually started. Computer systems and electronic equipment used need instant backup power which can't be provided by a genset.

In the last couple of years, there has been a significant rise in the fourth industrial revolution, i.e., industry 4.0. It is revolutionizing the manufacturing processes by integrating new technologies, including the Internet of Things (IoT), cloud computing and analytics, and AI and machine learning, into production facilities and operations. These operations are critical, and to protect the data and production line downtime, many companies use an uninterruptible power supply to stabilize the power and streamline production during the power outage.

Therefore, based on the above-mentioned factors, the industrial segment is expected to dominate the growth in the uninterruptible power supply (UPS) market during the forecast period.

Asia-Pacific Expected to Dominate the Market

The Asia-Pacific region is a developing region, with frequent blackouts and unstable power supply across the region, especially in countries like Malaysia, Cambodia, Philippines, and several others in the region. Major end-user of UPS systems in the region include the region's booming industrial and manufacturing sector, telecom sector, commercial sector, and residential sector. In the Asia-Pacific region, the manufacturing sector is one of the major contributors to the economy of various countries, with China being the largest hub of the manufacturing sector. Japan, India, South Korea, and Indonesia are also a few of the major contributors from Asia-Pacific, whereas countries like Vietnam, Malaysia, and Singapore are also expected to increase their share during the forecast period. ?

Automation in the manufacturing sector involving computer-based control systems, Programmable Logic Control (PLC) units, and process control applications has prompted the need for UPS systems in industrial facilities.

UPS systems not only provide backup in case of electric power failure, but they also protect equipment from power glitches like power sags, surges, under voltage, over-voltage, line noise, frequency variations, switching transient and harmonic distortions. Hence, UPS systems have become an essential part of almost all industries like telecom, engineering, manufacturing, R&D,

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education, medicine, IT, BPO, aviation, banking, and others.

Manufacturing sector covers a wide range of industries, including the automotive industry, food processing industry, semiconductors, steel manufacturing, and many more, all of which require power quality equipment like UPS systems for their smooth operations as fluctuating and disruptive power causes significant monetary losses to the industries..

For instance, in December 2021, China approved plans to build four mega clusters of data centers in its north and west to support the data needs of Beijing and major coastal centers. The clusters will be built in the northern Inner Mongolia region, northwestern Ningxia region, Gansu province, and southwestern Guizhou province.

In 2021, several players entered agreements to construct data centers in India. Digital Realty and Brookfield formed a joint venture to develop data centers, Iron Mountain and Web Werks, EdgeConneX and Adani, and Yondr and Everstone also formed joint ventures. In 2021, Google opened its second data center in India, whereas Microsoft started working on its fourth.

Power cuts and variable power supply cause significant damage to industries and businesses that rely heavily on good quality electricity for smooth operations. However, in developing countries like India and China, maintaining good quality power is difficult for the authorities.

For instance, according to Invest India, by 2026-27, India's power generation installed capacity will be nearly 620 GW, 38% of which will be from coal and 44% from renewable energy. India's aim to diversify its energy sources and the target to provide 24x7 electricity supply by making a large addition of renewable energy generation capacities is estimated to be a significant driver for the market. The growing electricity demand, increasing disposable income, and the need for a reliable power supply are expected to support the UPS market in India during the forecast period.

Therefore, based on the above-mentioned factors, Asia-Pacific is expected to become the fastest-growing UPS market during the forecast period.

Uninterruptible Power Supply (UPS) Market Competitor Analysis

The uninterruptible power supply (UPS) market is fragmented. Some of the major players (in no particular order) include Riello Elettronica SpA, EATON Corporation PLC, Emerson Electric Co., ABB Ltd, and Schneider Electric SE.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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