

Data Center UPS - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Data Center UPS Market was valued at USD 6.31 billion in the previous year, and it is expected to register a CAGR of 7.05%, reaching USD 9.58 billion by the next five years. The increased use of cloud computing services by small and medium-sized businesses and the massive increase in the amount of data centers globally are the primary reasons driving the growth of the data center UPS market.

Key Highlights

- Uninterruptible power supply (UPS) systems ensure large data centers' availability, which also protects delicate equipment across the entire building. They include redundant configurations and dual bus capabilities to ensure that the crucial systems will continue to function in the event of power disruptions like blackouts, brownouts, sags, surges, or noise interference.
- Data centers of all sizes utilize backup power supplies called data center uninterrupted power supplies (UPS). These systems are used during a power outage or a power shortage. The market for data center uninterrupted power supplies (UPS) is expanding rapidly due to the rising popularity of cloud computing, virtualization, and the demand for accessible data accessibility.
- The installation of a UPS system in a power supply line significantly improves business continuity by filtering main disturbances and outages and by providing clean power to vital loads like servers or other privileged equipment. The most crucial goal for reducing operating costs for all IT-related vital applications, such as data centers, is to increase energy efficiency. UPS solutions guarantee significant energy savings for data center applications, starting with low load percentages, which reduces the amount of carbon dioxide produced.
- Data centers' power distribution partners and protection vendors are under pressure to meet the rising demand for reliable electrical infrastructure topology solutions, which include UPS modules. The increased use of cloud servers, which pack more power into smaller spaces, is projected to fuel the market for data center uninterruptible power supply. Producers are focusing on creating power supplies with a lower total cost of ownership, improved efficiency, and investments in trustworthy technology to

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satisfy the expanding demand for cloud computing.

-UPS solutions are utilized to increase an infrastructure tolerance to AC grid failures and fluctuations and to improve the reliability and availability of a power distribution system. Most UPS systems are designed to power at maximum load for at least 5 minutes in the event of a power outage. In these 5 minutes, backup generation has enough time to try multiple attempts to start and take over the load from the UPS system. Inefficient data center power distribution can lead to wasted power and space, raising existing costs and constraining future growth. Data centers need to account for redundancy when sizing a UPS to prevent any cases of failure.

-One of the primary trends driving data center UPS market growth is the increased need for data and networking capacity. However, a significant obstacle to expanding the data center UPS market will be a lack of qualified or skilled employees. Furthermore, the high costs of raw materials would hinder market expansion.

-The surge on the internet and cloud adoption increased significantly during the spread of COVID-19 with a shift to the remote working environment and a focus on digitization by government authorities. Such factors are propelling the demand for increasing data center capacities in most regions across the globe, thereby creating significant growth in the market for UPS systems.

Data Center UPS Market Trends

Double Conversion Online Accounts for a Significant Market Share

- Large data centers provide power protection for vital IT equipment using centralized, high-capacity UPS systems. These systems achieve a new level of dependability and efficiency by integrating the most recent power protection technologies. The most reliable type of data center UPS, online double conversion, can handle various input conditions, including power from backup generators while supplying computer-grade output to the essential load. With the global rise in establishing data centers, investments in the facilities, and several government initiatives in pushing energy-efficient data centers, the market is expected to rise.

- Additionally, the expansion of the data center UPS market would be aided by the growing use of online double conversion technology in data center UPS systems. In addition to providing the highest power protection available for equipment, this technology also offers overload protection with a wide input voltage tolerance, static bypass capability, and failsafe and self-diagnostic features.

- Online, Double-Conversion UPS Systems are the most effective UPS that are required where the highest level of protection is the primary objective, regardless of the cost of the UPS to safeguard data centers, server rooms, and other network closets. Although they have a higher operating cost, produce more heat, and are less efficient, they are still recommended for all data centers, server rooms, and other network closets requiring the highest security level.

- Double conversion UPS modules provide uninterruptible power to essential loads by filtering and converting incoming utility power to DC power. The DC power is converted to a flawless AC output from the inverter. Double-conversion online Because they reduce the likelihood of electrical load loss, UPS systems are the ideal topology for mission-critical applications.

- Due to their extensive benefits, vendors are constantly investing in producing innovative products, which is one of the factors driving the market at a significant rate. For instance, in August 2022, Cyber Power Systems (USA) Inc., a pioneer in power management and protection technologies, recently introduced its online double-conversion, 3-phase Modular UPS systems, which offer industrial-grade power protection in a modular, scalable design factor. While the high-density 2U 10kVA/10kW power modules enable simple installation and maintenance, the N+X power redundancy in the UPS system line ensures uninterrupted opera.

North America to Hold Significant Market Share

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- North America is predicted to have a large share and to increase rapidly throughout the projection period. The primary end customers of data center UPS in the area are in the financial, healthcare, and insurance sectors. Companies are pushed to address their data center footprint and other difficulties to optimize their assets as high-availability computing becomes the standard.
- North America hosts numerous colocation facilities and data center service providers, especially in the United States. The scale and manner of operation of cloud and wholesale data centers create unique needs for conditioned uninterrupted power supply and provide unique opportunities for power efficiency. According to Cloudscene, by 2022, more than 2,000 Data centers will be located in the United States, creating a sizable market for UPS solutions.
- Modern electronic equipment, particularly servers, needs good quality, clean electrical power in the current market scenario. In recent years, UPS systems have made significant advances in efficiency with the introduction of eco-mode and intelligent paralleling to produce efficiencies at 99%.
- According to CBRE Group, in 2022, the power supply of data centers under construction in the United States reached 1.9 gigawatts, an increase of 52.8% compared to its previous year's supply. Such trends depict the increasing demand for data centers in the United States, further fueling the demand for the Data Center UPS Market.
- The disruption in the power supply led to issues with the operation of data centers in the state. The adoption of UPS systems results in mitigating such damages by weather changes. In addition, various companies across the country rely on data centers, making it crucial to have an uninterrupted power source. For instance, Microsoft is looking into ways to offer grid stabilization services using grid-interactive UPS technology in its data centers around the world in order to further grid decarbonization.
- As part of the company's commitment to become carbon neutral by 2030, the grid-interactive UPS project is included, along with experiments at data centers using liquid immersion cooling for servers, hydrogen fuel cells for backup power generation, as well as adjustments to operations to improve efficiency and design, like high-density cold plate solutions. Such vendor actions will strengthen the market's innovations, which are anticipated to fuel demand in the future.

Data Center UPS Industry Overview

The Data Center UPS Market is highly fragmented due to high initial investments. Some key players in the market are Emerson, ABB, and Seimens.

In June 2022, Vertiv announced the launch of a range of Uninterruptible Power Supply (UPS) solutions, including Vertiv Liebert ITA2, 30 kVA, and Vertiv Liebert EXM2 for Edge and Midsize Data Centers in India. The Liebert ITA2 30 kVA integrated Smart Sleep technology in ECO mode provides up to 99% superlative energy efficiency. Moreover, the Liebert EXM2 100-250 kVA offers high energy efficiency in the midsize UPS range, with up to 98.8% rating in dynamic online mode and 97% in double conversion mode. It is also compatible with lithium-ion battery configurations and adapts to two-wire DC bus connection settings.

In March 2022, Eaton announced the launch of a 9395XC Uninterruptible Power Supply (UPS) to offer the highest power density in a smaller footprint that can scale to meet operators' evolving requirements. The 9395XC UPS features more intelligent sensing capabilities and integrations that enable 24x7, real-time power infrastructure monitoring and management.

Additional Benefits:

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

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