

Backup Power Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Backup Power Systems Market is expected to register a CAGR of greater than 3.5% during the forecast period.

The market was negatively impacted by the outbreak of COVID-19 due to regional lockdowns. Currently, the market has rebounded to pre-pandemic levels.

Key Highlights

- Factors such as the power outages that are prevalent worldwide and the rising demand for standby power sources are expected to be the biggest drivers for the backup power systems market.
- However, the rapid adoption of renewable power sources and distributed technologies onto the grid is expected to hamper the market growth of backup power systems during the forecast period.
- The industrial sectors of emerging economies and the increasing need for power in defense operations are likely to create significant opportunities for market participants in the near future.
- North America is expected to be the largest market due to increased power outages in the United States, leading to financial losses and driving the demand for backup power systems.

Backup Power Systems Market Trends

The Commercial Sector is Expected to Dominate the Market

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- In 2022, the commercial sector accounted for about 22% of the global consumption of electricity, making it one of the more significant segments. Moreover, power outages and unreliable grid electricity lead customers in the commercial sector to adopt backup power solutions to perform their business activities at the time of power outages, driving the market's growth.
- Additionally, there is also a significant increase in the development of data centers in Asia-Pacific. For instance, in May 2022, Cisco launched its first data center in India. The company aims to cater to rising customer demands for cyberdefense and data localization. Thus, Cisco's Duo has established its first data center in India. Furthermore, with this investment, Cisco aims to build a future-ready, data-compliant security infrastructure in India.
- Moreover, in April 2022, Google announced building a new data center in Nebraska, United States. The total investment is expected to be around USD 750 million. Furthermore, the company aims to invest more than USD 9.5 billion in the data center, particularly in the United States. Google has already invested more than USD 37 billion in offices and data centers in 26 states in the last five years.
- Similarly, several players entered into agreements to construct data centers in India. For example, in 2021, Iron Mountain and Web Werks, EdgeConneX and Adani, and Yondr and Everstone started joint ventures to develop data centers in India.
- Additionally, in January 2022, Adani Group announced that it was investing more than USD 560 million in two data center projects in Uttar Pradesh, India. Such a scenario is expected to propel the need for backup power systems like UPS during the forecast period.
- Hence, the commercial sector is increasingly moving toward power backup sources, which are expected to dominate the market during the forecast period.

North America is Expected to Dominate the Market

- Electricity is one of the essential parts of modern life and plays a vital role in North America's economy. Electricity is generated at power plants and delivered through a complex system of substations, transformers, and power lines that connect electricity producers and consumers. The power system may sometimes get interrupted, leaving catastrophic results for the customers.
- In the United States, Florida, New Hampshire, Maine, Georgia, and Vermont, on average, have the most prolonged total time power interruptions. The average customer interruption time in these five states ranged from 15 hours in Vermont to 42 hours in Maine. Power outages cost an average of about USD 18 billion to USD 33 billion per year in the country. Backup generators and UPS systems are considered the most viable options for ensuring that business operations continue without interruption.
- According to Cloudscene, as of March 2023, North America accounted for more than 51% of data centers across the globe, with the United States accounting for almost 43.5% of data centers and having about 3,207 data centers. In addition, the number of data centers is expected to increase in the region, as the United States is the fastest adopter of advanced technology such as big data, IoT, artificial intelligence, and expanded coverage of 5G services across the country.
- Therefore, power outages from blackouts and voltage disturbances can cause significant losses to businesses that are highly dependent on reliable power, hence the promotion of backup power solutions such as generators and UPS.
- Based on the factors mentioned above, North America is expected to be the dominant region for backup power systems during the forecast period.

Backup Power Systems Industry Overview

The backup power systems market is fragmented. Some of the key players are (in no particular order) Caterpillar Inc., Kohler Co., Atlas Copco AB, Generac Holdings Inc., and Eaton Corporation.

Additional Benefits:

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

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