

Modular UPS - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Modular UPS Market size is estimated at USD 6.26 billion in 2025, and is expected to reach USD 10.25 billion by 2030, at a CAGR of 10.38% during the forecast period (2025-2030).

Data losses, lack of key services, hardware risks and significant financial loss may result from power disturbances in data centers that typically require 100% availability. Therefore, in order to ensure continuous power supply and reduce the risk of system failure, there is a high demand for UPSs in data centers. As a result of the growing reliance on large-scale applications and cloud services, demand for colocation services has increased, offering new prospects for the modular UPS industry.

Key Highlights

- The modular uninterruptible power supply (UPS) is a resilient and adaptable power protection system that regulates UPS performance. The modules are hot-swappable and automatically recognized when connected. The product's adoption is expected to be strengthened by its robust implementation of zero and dependable power downtime. Modular UPS systems are becoming more prevalent among companies that require a dependable power source for their essential infrastructure.
- There has been a growing demand for new technology advancements, such as cloud computing adoption, data storage needs, digital services, regulatory requirements, expanding user base, and business scalability across regions.
- The primary benefits of a modular uninterruptible power supply (UPS) system lie in its capacity for scalable expansion and decreased maintenance expenses. Hyperscale data centers and colocation providers employ modular UPS technology, employing various architectures to minimize operational costs and maintain redundant capacity. Many organizations opt for smaller modules supporting 10-kilovolt amperes to 50 kVA, as N+1 designs offer cost-effective redundancy, superior loading, and efficiency compared to multiple parallel UPS systems. Meanwhile, 2N designs ensure precise load matching.
- Modular systems offer a simplified and more manageable approach to maintenance. The modules are designed to be

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hot-swappable, allowing for seamless removal, replacement, and testing while the system remains operational. Modular UPS systems have power capacities ranging from 10-100 kVA, 100-250 kVA, 215 kVA, and 500 kVA and above. These systems are widely utilized in diverse sectors, including data centers, industries, telecommunications, commercial, BFSI, government, and other verticals.

- Moreover, the initial installation expenses associated with modular UPS systems typically exceed those of conventional centralized UPS solutions. Although the modular approach provides scalability and adaptability, the upfront capital investment may dissuade budget-conscious clients, particularly those in smaller enterprises or organizations with limited financial resources.
- The modular uninterruptible power supply UPS market has been negatively affected by the COVID 19 pandemic. The development of the modular UPS market has been greatly influenced by the closure of large government, energy and industrial undertakings.

Modular UPS Market Trends

BFSI Segment to Witness the Growth

- Critical applications that can't be interrupted or data lost due to power failures are critical for financial institutions as investment firms, banks and insurance companies. In order to protect sensitive financial and banking systems from power disturbances, three phases of modular uninterruptible power supplies are used.
- The demand for modular UPS systems has been driven by rapid modernisation and the widespread use of the internet in various sectors, especially in the financial services, banking, and insurance sector, as different data processing and service systems are connected to commercial banks to provide the highest level of customer service.
- Moreover, The one of the main driver for the growth of the market is also the need for the financial sector to remain at the forefront of technology and business or risk being outpaced by its competitors. In order to reduce illegal transactions and to increase the use of electronic cash, technology and internet data security across the world and governments are planning innovation in the use of internet banking.
- As of June 2023, around 943 million people used mobile payments in China as of usage of electronic cash. . The outbreak of COVID-19 has led to an increase in the number of new users, as growth rates for new users have begun to decline after 2017.
- The presence of these above-mentioned applications and government support to develop cashless economy will provide ample opportunities for the growth of the market.

North America Holds the Largest Share in Modular UPS Market

- The market for modular UPS is estimated to be dominated by North America, due to high demand from the IT and telecommunications sectors, as well as health care and manufacturing. These organisations have significant operational bases, increasing the demand for data centres and colocation services as well as an increased need for hybrid UPS solutions.
- Moreover, The demand for data centers, which must be constantly supplied with power, is increased by the development of IT and a rising interest in e Commerce and digital payments across America, making modular UPS more popular. Moreover, regular checks which contribute to market growth are being carried out by the authorities in view of an increasing concern for data and asset theft.
- Latin America has grown in popularity in recent years. Advanced technologies such as IoT, big data, and AI are becoming more popular in the region. Cloud use is also accelerating in this sector.
- In addition to establishing microgrids and local power generation, operators purchase redundant power infrastructure, such as UPS systems, to power their facilities, generating income for system makers and propelling the market forward.

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Modular UPS Industry Overview

The Modular UPS market is highly fragmented, with a large number of players that includes ABB Ltd, Emerson Network Power, Delta Power Solutions, Huawei Technologies Co. Ltd, Schneider Electric SE, General Electric, Gamatronic Electronic Industries Ltd, and others. This implies that the market concentration is low.

- July 2023 - ABB Ltd announced the launch of MegaFlex DPA (Decentralized Parallel Architecture) UPS solutions in India. ABB's MegaFlex UPS line is aimed at the UL and IEC markets, with a power range of 1.6 and 1.5 MW. The MegaFlex solution provides exceptional availability and dependability while having the smallest footprint on the market, with the IEC version being up to 45 percent less than competitor products of the same power rating.
- July 2023 - Schneider Electric has introduced Easy UPS 3-Phase Modular. This robust uninterruptible power supply (UPS) is designed to protect critical loads while offering third-party verified Live Swap functionality. Easy UPS 3-Phase Modular available in 50-250 kW capacity with N+1 scalable configuration and supports the EcoStruxure™ architecture, which offers remote monitoring services.

Additional Benefits:

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

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