

## **Southeast Asia Uninterruptible Power Supply (UPS) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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### **Report description:**

The Southeast Asia Uninterruptible Power Supply Market is expected to register a CAGR of greater than 3.3% during the forecast period.

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

#### Key Highlights

- Over the short term, the major driving factors of the market are expected to be the increasing electricity demand primarily from end-users such as manufacturing and commercial during the forecast period.
- On the flip side, the high capital cost and operational expenditure are expected to slow down the growth of the market during the forecast period.
- The technological advancements in UPS systems, like artificial intelligence, machine learning, IoT, etc., are expected to create immense opportunities.
- Vietnam is expected to witness significant growth in the market due to the rising demand for manufacturing, telecom, and industrial sector, etc.

#### Southeast Asia UPS Market Trends

#### Standby UPS System to Witness Significant Demand

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- A standby UPS system, also called the offline UPS system, provides the essential features of a UPS system, which provides battery backup and surge protection. A standby UPS system switches to a battery fast enough to prevent power anomalies and ride out short outages. A standby UPS system protects against most voltage spikes. However, it doesn't maintain perfect power during sags and sages.
- The key to offline UPS quality is the range of power the unit will accept before switching to battery backup. The wider the field, the less drain on the battery and the more backup time available when the power shuts off. The more times the UPS switches to battery backup, the shorter the battery life.
- The standby UPS technology is best suited for devices under 1,500 VA, such as small offices, personal computers, and less critical applications. The offline UPS is a good option for requiring lower power capacity and is the most cost-effective option. In addition, offline UPS technology provides a power backup solution for desktop equipment, workstations, gaming consoles, wireless networks, consumer electronics, and other electronics. During power outages, it gives enough runtime to save work in process and complete an orderly shutdown, and it is also used in essential surge protection.
- The growing demand for consumer electronics across the globe is one of the major drivers for standby UPS systems compared to other UPS systems, as the standby UPS system is the most preferred option for consumer electronics as it is the most economical option for devices with low power consumption. Due to the COVID-19 pandemic, the demand for desktop computers increased as people were forced to work from home.
- For instance, according to the International Data Center (IDC), the global shipment of desktop personal computers increased in 2021 to about 88.27 million units compared to the previous year, which was just about 79.8 million. Similarly, the demand for gaming consoles is expected to increase during the forecast period and was aided by the coronavirus pandemic, which led to a surge in demand for home entertainment. According to VGChartz, the cumulative sales of current-generation consoles increased from 13.12 million units in 2017 to 46.32 million units in 2021. Out of the mentioned statistics, Asia-Pacific and Southeast Asian regions accounted for the majority of the sales. This factor is expected to increase the demand for standby UPS systems in the Southeast Asian region during the forecast period.
- Overall, the demand for standby UPS system is primarily expected to come from consumer electronics as offline UPS system provides the least expensive power backup and protection to the devices, and it is likely to increase during the forecast period due to the increasing demand for desktop PC and gaming consoles.

#### Vietnam to Witness Significant Demand

- As the manufacturing sector is one of the major contributors to the economy of the Southeast Asian region, Vietnam is expected to increase its 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, and switching transient and harmonic distortions. Hence, UPS systems have become an essential part of almost all industries like telecom, engineering, manufacturing, R&D, education, medicine, IT, BPO, aviation, banking, and others.
- The 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. In 2021, Vietnam's manufacturing sector accounted for 25.13% of the country's total GDP, reaching a value of over USD 87.5 billion.
- Vietnam, in September 2020, issued its New National Industrial Policy, Resolution No. 23-NQ/TW. The policy outlines the country's plan to increase the share of the industrial sector in their GDP to more than 40% by 2030. In this, manufacturing and processing industries are likely to account for around 30%. The manufacturing industry solely is projected to account for approximately 20%.

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- Moreover, in May 2022, Chinese power conversion expert Shenzhen Kstar Science and Technology Co. Ltd was seen building a gigawatt-scale solar inverter production facility at a new manufacturing base worth USD 22 million in Northern Vietnam. The base will be constructed in two phases on a 47,715-sq-m (513,600 sq ft) area in the port city of Haiphong. The Kstar Vietnam Project Phase I includes the addition of production capacities for 10,000 units of uninterruptible power supply, 1,000 units of modular data centers, and 1 GW of solar inverters per year. Building works for Phase II are expected to begin in 2024.
- Such growth and investments in Vietnam indicate the rise in the manufacturing sector, which in turn, is expected to increase the demand for UPS systems during the forecast period.

## Southeast Asia UPS Industry Overview

The Southeast Asian uninterruptible power supply (UPS) market is moderately fragmented in nature. Some of the major players in the market (in no particular order) include Eaton Corporation PLC, Riello Elettronica SpA, Emerson Electric Co., Delta Electronics Inc., and ABB Ltd.

### Additional Benefits:

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

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