Uninterruptible Power Supplies (UPS) Intelligence Service

Part of the Cloud & Data Center Service Area Package
Comprehensive insight and analysis of the UPS hardware and services markets

“New technologies for UPS and energy storage systems are enabling even more efficient and sustainable data centers.”

Moises Levy, Ph.D.
Principal Analyst
KEY QUESTIONS ADDRESSED

• What is the market size and forecasted growth for UPS hardware, support and services?
• Is modular UPS adoption growing?
• Who are the biggest UPS vendors?
• What are the relevant trends for different vertical markets, sales channel and applications?

HOW OMDIA HELPS YOU

• High accuracy data, based on vendor reporting, on UPS hardware, segmented by power rating, geographic region and country
• Track the growth of UPS hardware, support and services, modular UPS and industrial UPS
• Get perspective on use cases of new technologies to achieve more sustainable data centers
• Follow key trends like AI-based analytics, monitoring and management
• Understand highly disruptive technologies like smart grid ready UPS

NEW ENHANCEMENTS

• Quarterly market updates
• Semi-annual trackers like the modular UPS, industrial UPS and UPS service and support will become annual and will all be updated both in 2021 and 2022
• Annual end-user survey
• Topical reports on new technologies like smart grid ready UPS, insights on battery energy storage system
• New “Trends to Watch” report
# Data Center UPS Intelligence Service: Our Experts

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<tr>
<th>Name</th>
<th>Title</th>
<th>Specializations</th>
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<tr>
<td>Vlad Galabov</td>
<td>Research Director</td>
<td>Open computing, Hyperscale cloud service providers, Semiconductor development</td>
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<tr>
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<td>Chief Analyst</td>
<td>IT operations, Application delivery, Disruptive software technologies</td>
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<td>Moises Levy</td>
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<td>Colocation services, Data center investment, Location &amp; construction strategies</td>
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<tr>
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<td>Compute systems, Data center networks, Disruptive hardware technologies</td>
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<tr>
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<td>Senior Analyst</td>
<td>Data center racks, Rack power distribution, Micro data centers</td>
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<tr>
<td>Dominika Koncewicz</td>
<td>Senior Analyst</td>
<td>SD-WAN platforms, SASE &amp; SD-WAN aaS, network service consolidation</td>
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<tr>
<td>Nicole Tuggle</td>
<td>Research Analyst</td>
<td>rPDU vendor share, UPS hardware &amp; service vendor share</td>
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<td>Currently Recruiting</td>
<td>Principal Analyst</td>
<td>Kubernetes, Cloud native software development</td>
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<tr>
<td>Currently Recruiting</td>
<td>Senior Analyst</td>
<td>Cloud services, Data center buildout</td>
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Uninterruptible Power Supplies (UPS): Deliverables

MARKET TRACKERS
—Annual—
- UPS Hardware Market Tracker
- UPS Service and Support Market Tracker
- Industrial UPS Market Tracker
- Modular UPS Market Tracker

MARKET TRACKERS
—Quarterly—
- UPS Hardware and Services Market Update

SURVEYS & REPORTS
—Annual—
- UPS Strategies – End-user Survey
- “Trends to Watch” Report

ANALYST INSIGHTS
—Ongoing—
Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.

BRIEFINGS
—Biannual—
Biannual scheduled briefings with analysts on research highlights from all aspects of the market.

ANALYST ACCESS
—Ongoing—
For prompt responses to urgent and unique questions.
Uninterruptible Power Supplies (UPS): Market Trackers

**UPS Hardware**

Detailed market data and forecasts by power rating, distribution channel, vertical market, and application; includes vendor shares

### DETAILS

**Frequency:** Quarterly

**Measures**
- Revenue (in $, €, £, and ¥)
- Unit shipments
- Average unit prices

**Regions**
- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

### COVERAGE

**Power rating segmentation**
- Single-phase: ≤1 kVA, 1.1-5 kVA, 5.1-10 kVA, 10.1-20 kVA
- Three-phases: 5.1-10 kVA, 10.1-20 kVA, 20.1-100 kVA, 100.1-250 kVA, 250.1-500 kVA, 500.1-800 kVA, 800.1-1500 kVA, >1500 kVA

**Vertical markets**
Cloud service providers/Colocation service providers/Communication service providers/Media and entertainment/Energy and utilities/Media and entertainment/Energy and utilities/Financial services/Government/Education/Healthcare/Retail and wholesale/Manufacturing/Transportation and logistics/Other

**Sales channels**
- Distributor (Datacom/Electrical/IT)
- Contractor/Engineering firm
- Direct to end-user
- System integrator/OEM
- Other

**Applications**
- Data center and IT
- Light Industrial
- Heavy Industrial

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Omdia’s UPS trackers continue to evolve and build on our existing, detailed database of the market. We are excited to be partnering with all major UPS vendors to ensure this report provides detailed market share and a five-year forecast.

Managers and operators have decisions to make about UPS and energy storage systems strategies. Awareness must be created to understand new technologies and adoption for high-efficient and environmental-friendly equipment.

Moises Levy, Ph.D.
Principal Analyst
Uninterruptible Power Supplies (UPS): Market Trackers

### UPS Service and Support

Covers UPS service and support by service type, power rating, and end-user industry; includes vendor shares

**Details**
- **Frequency:** Annual

**Measures**
- Revenue (in $)
- Unit shipments
- Average unit prices

**Regions**
- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

**Coverage**
- **Single phase service types:** Installation, warranty extensions, service contracts, battery replacement, other
- **Three-phase service types:** Installation, project management, site and factory acceptance testing, commissioning, service contracts, time and materials, preventative maintenance, battery replacement, training, energy efficiency assessments, remote monitoring, equipment leasing, other
- **Power rating segmentation:**
  - **Single-phase:** ≤5 kVA, 5.1-20 kVA
  - **Three-phase:** 10.1-100 kVA, 100.1-500 kVA, 500.1-800 kVA, 800.1-1500 kVA, >1500 kVA

**Vertical markets:**
- Cloud service providers
- Colocation service providers
- Communication service providers
- Media and entertainment
- Energy and utilities
- Financial services
- Government
- Education
- Healthcare
- Retail and wholesale
- Manufacturing
- Transportation and logistics
- Other

### Industrial UPS

Covers industrial UPS by application, power rating, and topology; includes vendor shares

**Details**
- **Frequency:** Annual

**Measures**
- Revenue (in $)
- Unit shipments
- Average unit prices

**Regions**
- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

**Application**
- Heavy industrial: Chemical & processing; military; mining; nuclear; oil, gas and petrochemical; power generation, utilities
- Light industrial: manufacturing & resources; marine; medical; security; transportation; other

**Sales channels**
- Distributor (Datacom/Electrical/IT)
- Contractor / Engineering firm
- Direct to end-user
- System integrator / OEM
- Other

**Power rating segmentation:**
- ≤1 kVA, 1.1-5 kVA, 5.1-10 kVA, 10.1-20 kVA, 20.1-100 kVA, 100.1-250 kVA, 250.1-500 kVA, 500.1-800 kVA, 800.1-1500 kVA, >1500 kVA

**Topology:** Single-phase; three-phase in/single-phase out; three-phase with transformer; three-phase transformerless
# Uninterruptible Power Supplies (UPS): Market Trackers

## Modular UPS
Covers Modular UPS by power rating, and topology; includes vendor shares

### DETAILS
- **Frequency:** Annual

### Measures
- Revenue (in $)
- Unit Shipments
- Average unit prices

### Regions
- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

### COVERAGE
- **Applications**
  - Data center and IT
  - Light Industrial
  - Heavy Industrial

- **Power rating segmentation:**
  - ≤10 kVA, 10.1-20 kVA, 20.1-100 kVA, 100.1-250 kVA, 250.1-500 kVA, 500.1-800 kVA, 800.1-1500 kVA, >1500 kVA

## Quarterly UPS Market Update
Covers UPS hardware, service and support; includes vendor shares and a forecast update

### DETAILS
- **Frequency:** Quarterly

### Measures
- Revenue (in $)

### Regions
- North America
- Latin America & the Caribbean
- Western Europe
- Rest of Europe, Middle East and Africa
- Asia and Oceania
- And 56 country and minor regions

### COVERAGE
- During each quarter we publish the prior quarter revenue based on vendor guidance and earnings releases
Uninterruptible Power Supplies (UPS): Market Trackers

Trends to Watch Report

Our experts summarize what the industry should be looking out for in the next year.

DETAILS

Frequency: Annual

Topics include:
• Analysis of disrupting technologies with a high level forecast
• Discussion of use cases, verticals segments and vendors
• Trends supported by end-user survey data, including from Omdia’s annual Enterprise IT survey with over 4000 IT decision makers

UPS Strategies – End-user Survey

Interviews with at least 100 purchase-decision makers at enterprises in at least two major countries. Survey explores investment drivers, barriers, purchasing strategies and top use cases for UPS and related technologies such as battery energy storage systems.

DETAILS

Frequency: Annual

Topics include:
• High level investment drivers
• Vertical-specific trends
• Smart grid ready UPS
• Battery energy storage systems
**Related Content: Cloud & Data Center Service Area Coverage**

**About Omdia’s Cloud & Data Center Research**

Omdia provides deep analysis of worldwide compute technologies – from cloud to the edge. Detailed and data-rich intelligence services cover all aspects of data center IT and physical infrastructure, cloud & colocation services, and the strategies required to manage the entire IT ecosystem.

Omdia’s expert team of cloud and data center analysts provide strategic guidance, steeped in a robust foundation of data, to both vendors and technology decision makers. Omdia has consistently been 1st to market capturing market disruptions and technology transitions, helping IT decision makers and their vendors succeed in navigating these transitions. For technology decision makers, Omdia also provides guidance on vendor selection and best practices for management of IT operations.

The Cloud & Data Center team provides market analysis in the form of quarterly datasets with size, share and forecasts, end-user surveys, vendor assessments and personalized consulting.
Comprehensive data, insights & advice

**New in 2022**
- Cloud Native Software Development
- Worldwide Data Growth Forecast
- High Performance Computing
- Data Center Sustainability Framework, Strategies, Incentives and Investment
- Thermal Management Strategies

**New in 2021**
- Server Workload Forecast
- Data Center Sustainability
- Smart Grid UPS
- Infrastructure Management
- Cloud Storage

**Old but Gold**
- Hyperscale Cloud Service Providers
- Server CPU transitions
- Heterogeneous Compute SmartNICs, AI Accelerators, GPUs
- Open Computing
- Servers in the telecom network
- AI Ops and Cloud Ops
- SD-WAN
- Data Center Buildings Tracker
- UPS Markets and Architectures
- Edge computing and micro DCs

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