

# 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

# Uninterruptible Power Supplies (UPS) Intelligence Service

Part of the Cloud & Data Center Service Area Package

## 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?

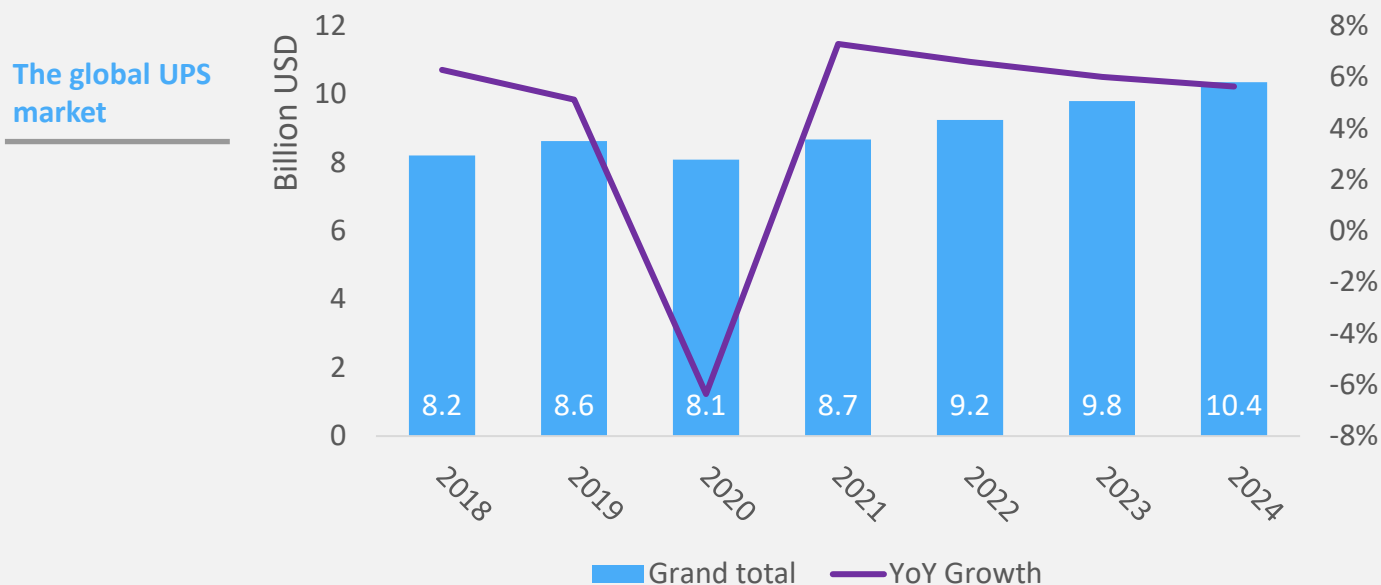
## HOW OMDIA HELPS YOU

- 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

UPS Hardware Revenue Forecast




# Data Center UPS Intelligence Service: Our Experts

**Vlad Galabov**  
**Research Director**




- Open computing
- Hyperscale cloud service providers
- Semiconductor development

**Roy Illsley**  
**Chief Analyst**




- IT operations
- Application delivery
- Disruptive software technologies

**Moises Levy**  
**Principal Analyst**




- Power and cooling
- Energy efficiency
- Data center sustainability

**Alan Howard**  
**Principal Analyst**




- Colocation services
- Data center investment
- Location & construction strategies

**Manoj Sukumaran**  
**Principal Analyst**




- Compute systems
- Data center networks
- Disruptive hardware technologies

**Dennis Hahn**  
**Principal Analyst**




- Storage systems
- Data management
- Software-defined storage

**Vijendra Krishnamurthy**  
**Senior Analyst**




- Data center racks
- Rack power distribution
- Micro data centers

**Dominika Koncewicz**  
**Senior Analyst**




- SD-WAN platforms
- SASE & SD-WANaaS
- network service consolidation

**Nicole Tuggle**  
**Research Analyst**




- rPDU vendor share
- UPS hardware & service vendor share

**Keith Kirkpatrick**  
**Principal Analyst**




- Quantum computing
- High performance computing

**Currently Recruiting**  
**Principal Analyst**



- Kubernetes
- Cloud native software development

**Currently Recruiting**  
**Senior Analyst**



- Cloud services
- Data center buildout

# 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



New

## MARKET TRACKERS

—Quarterly—

- UPS Hardware and Services Market Update



New

## 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 / 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

“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

### COVERAGE

**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

### 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



## Service Area Package: **Cloud & Data Center**

Cloud & Colocation  
Intelligence Service

IT Ecosystem & Operations  
Intelligence Service

Data Center Compute  
Intelligence Service

Data Center Rack Systems  
Intelligence Service

Data Center Networks & Automation  
Intelligence Service

Uninterruptible Power Supply  
Intelligence Service

Data Center Storage  
Intelligence Service

Data Center Thermal Mgmt  
Intelligence Service

## 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 1<sup>st</sup> 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

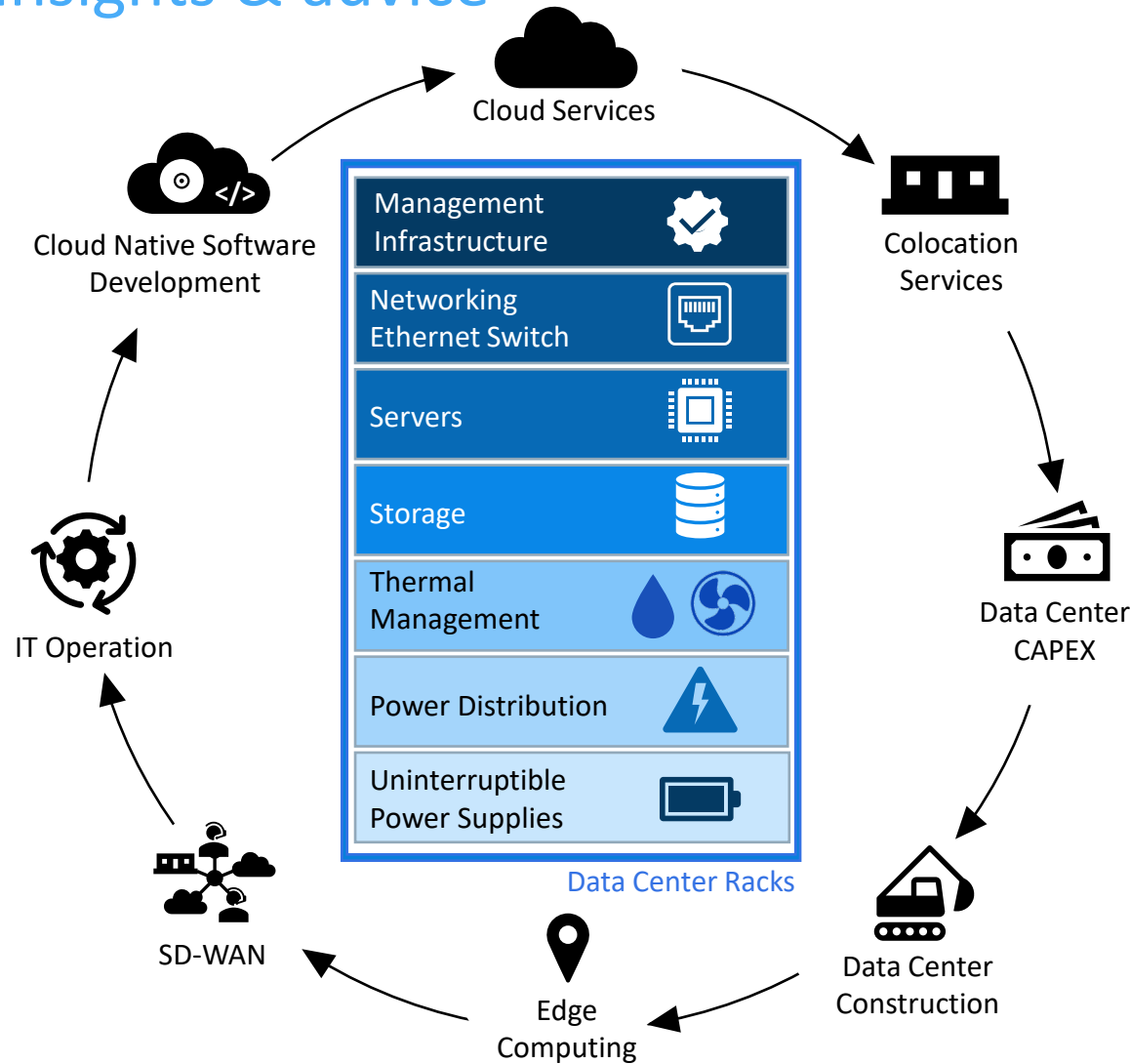
Server Workload Forecast

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

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

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- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager



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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.