

UPS Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic UPS market with the following conditions:

1. Research period: From October to December, 2016
2. Research targets: Manufacturers and sellers of UPS, and related organizations
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature research

What is an UPS?

An UPS (Uninterruptible Power System) in this research indicates an electrical apparatus that provides emergency power to the devices/systems, including computer systems, communication/broadcasting devices, medical equipment, DPE (disaster preventing equipment), clean rooms, and other various manufacturing equipment and etc., when power cut or instantaneous voltage drop occurs. Note that voltage-dip compensators that can be available only for an instantaneous voltage drop are not included in this research.

What is the UPS Market?

The UPS market size in this research targets only those shipped to the domestic market and does not include those for exports. Also, the market size is the sum of UPS shipment value only, and those expenses for peripheral parts, installation work, maintenance, and etc. are not included.

◆ Key Findings

■ Domestic UPS Market in FY2016 Projected to Rise by 0.7% on Y-o-Y basis to Attain 63.795 Billion Yen

The domestic economy saw a recovering tendency during FY2015 which encouraged capital investment and brought about some large-scale UPS introductions at enterprises. This led the domestic UPS market size in FY2015, based on the shipment value at manufacturers, to expand by 4.9% from the preceding fiscal year to achieve 63.330 billion yen. Now that the general updating works at large datacenters have overall finished during the previous fiscal year, the market size for FY2016 is projected to be the same level or up a little by 0.7% to achieve 63.795 billion yen.

■ UPS with 100kVA and Larger Start Using SiC Power Modules

In 2016 a new types of UPS has been launched. This type of UPS uses SiC which is expected to be the next-generation power module with fewer losses. In spite of little influence is seen from SiC-adopted systems at this time, there is no doubt that they gradually become acknowledged as one of the options for large capacity UPS with 100kVA or more to select their modules. As UPS makers themselves focuses on developing and promoting those SiC-adopted UPS, their true values are to be appreciated from this time on.

■ Market Forecast: Domestic UPS Market Predicted to Revive From FY2019

The domestic UPS market from FY2017 to FY2018 is likely to be on the decline, because the sales of relatively expensive large capacity UPS with 100kVA or more for datacenters is projected to decrease. In FY2019 and later, however, the preparation of the Tokyo Olympic and Paralympic Games 2020 are likely to expand the demand of UPS in the security (surveillance) systems, broadcast equipment, transportation, and etc.

◆ Report Format:

Published report: “UPS (Uninterruptible Power System) Market 2017”

Issued on: December 22, 2016

Language: Japanese

Format: 130 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

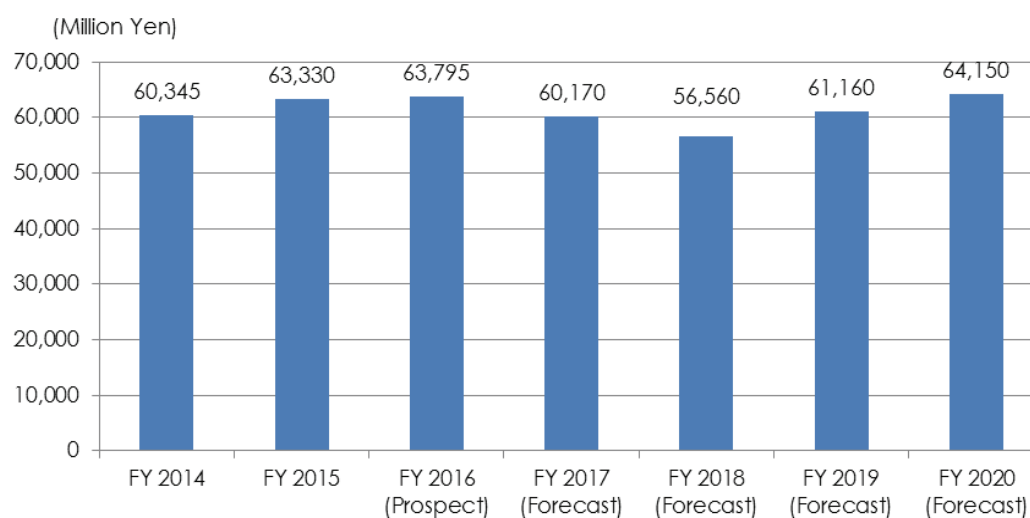
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■ Figure 1: Transition and Forecast of Domestic UPS Market Size



Estimated by Yano Research Institute

Notes:

1. The market size is based on the shipment value at manufacturers.
2. The UPS market size in this research targets only those shipped to the domestic market and does not include those for exports. Also, the market size is the sum of UPS shipment value only, and those expenses for peripheral parts, installation work, maintenance, and etc. are not included.