

## European UPS Services Markets

Description: Servicing Holds Key to Future Growth

Services have emerged as the most profitable segment in the European uninterruptible power supplies (UPS) market. Manufacturers are increasingly looking at the services business to boost their overall growth and turnover. All the action in the UPS market has now shifted from the sales department to the services front. Servicing is now seen as a guaranteed income provider for the long term.

It also spurs further sales and growth. "Maturity and increasing consolidation in the sales market is prompting UPS manufacturers to look at the servicing arena for future growth and business expansion," explains the analyst of this research. "The need for critical back-up power protection, coupled with heightened awareness of the need for regular servicing and maintenance, drives market growth." The market for UPS systems in Western Europe is mature and developed. Accordingly, awareness levels about UPS systems and their benefits are high in comparison to smaller markets. Increase in the installation UPS systems in medium to large power ranges fuels the growth of the services market.

Majority of the share of revenues in this market is expected to come from preventative maintenance of three-phase systems in Western Europe. However, the extent to which manufacturers can leverage market potential will depend on their ability to establish new servicing networks and enhance servicing capabilities. Manufacturers in the services market are busy evolving themselves to become comprehensive critical power protection solution providers. This is because future success in the UPS market depends on their ability to become total service providers in power protection solutions.

One-Stop Shop: The Hottest Concept in the UPS Services Market

Intense competition from third-party service providers who offer services at much lower prices is proving to be the most significant challenge facing UPS manufacturers today. Emphasis on price, rather than service quality by consumers, is the key factor supporting third party service providers' businesses. Encroachment by third-parties on original equipment manufacturers' (OEM) servicing business hampers services revenues and the overall expansion of parent companies. "Considerable potential in the services market remains largely untapped by manufacturers due to their limited servicing network and capabilities," adds the analyst. "This situation is leveraged by independent service providers, resulting in UPS manufacturers missing out on a substantial portion of revenues from their most profitable business segment."

The market sees soaring demand for manufacturers who offer complete power protection solutions. Consumers prefer giving all servicing contracts to one company rather than to different companies. Horizontal integration of UPS, data centre and cooling markets further spur the need for total solutions. Cross-vertical applications of these industries result in the need for complete solution providers. Responding to this, manufacturers are attempting to rebrand themselves as one-stop solution providers.

To succeed in the European services market, manufacturers need to boost their servicing capabilities by recruiting skilled manpower and establishing servicing networks across the continent. Developing rapport with end users through customer-oriented programmes and trade shows can enable them to sustain growth momentum. These strategies, if judiciously implemented, can go a long way in defending market shares and revenues of OEMs in the services market.

This Frost & Sullivan research service titled European UPS Service Markets offers an in-depth examination of defining market trends, factors driving and restraining the market, main challenges facing manufacturers, revenue forecasts and competitive analysis. A discussion of key challenges is accompanied by strategic recommendations for market participants. In this research, Frost & Sullivan's expert analysts thoroughly examine the following markets: single-phase UPS and three-phase UPS.

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