APAC Occupancy Sensors - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The APAC Occupancy Sensors Market size is estimated at USD 2.95 billion in 2025, and is expected to reach USD 5.18 billion by 2030, at a CAGR of 11.89% during the forecast period (2025-2030).

Key Highlights
- The Asia Pacific Occupancy Sensors Market is poised for significant growth, driven by increasing urbanization, energy efficiency demands, and advancements in smart building technologies. Sensor-laden lighting systems now have industry acceptance for data-driven applications beyond lighting. In the coming years, OEMs may integrate sensors in luminaires to construct smart luminaires that can be an integral part of a interconnected lighting system. Thus, this may drive the market in the future.
- Occupancy sensors are generally used for security purposes, such as preventing damage, burglary, and stealing. These are also utilized to give automatic control, conform with construction requirements, and conserve energy.
- The rising demand for energy-efficient devices is expected to drive the market. Occupancy sensors play a vital role in reducing energy consumption. This is achieved through the sensors, which shut down machines and other equipment based on occupancy. These sensors help minimize light pollution and can be used for indoor and outdoor spaces. As part of the Digital India initiative, the Indian government has planned to push IoT in the country. The government allocated an INR 7,000 crore (USD 847.7 Million) fund to develop 100 smart cities powered by IoT devices to control traffic, efficiently use water and power, and collect data using IoT sensors for healthcare and other services. Such expansion in smart cities may further propel the studied market demand.
- For instance, recently NetworkThermostat, a communications-based thermostat manufacturer, announced the NT-OSC (ceiling mount) and NT-OSW (wall mount) occupancy sensors. These sensors efficiently integrate with any NetworkThermostat GE, HP, or UP thermostat platform via a single CAT5 or 4-wire thermostat cable. The thermostat delivers power and automatically recognizes the occupancy sensor.
- Furthermore, the demand for passive infrared is anticipated to continue in the forecasted period due to the low cost, need for

energy-efficient devices, and less power requirement. It has a range of applications, such as lighting, gas and fire detection systems, spectrometers, etc. Passive infrared sensors' significant benefits are accurate movement detection, reliable triggering, and cost efficiency. For instance, recently MSA launched the latest HazardWatch FX-12 fire and gas system with next-gen capabilities and FM approval. The new HazardWatch FX-12 fire and gas system incorporates the proven expertise of the industry's players in safety and automation.
- Despite significant advertising, occupancy sensors are less developed than other lighting technologies, such as motion and vacancy sensors. It is hampered by the difficulty of precisely forecasting the occupant's occupancy. An occupancy sensor's performance is affected by user occupancy, lighting control patterns, and sensor selection. Furthermore, it is regarded as expensive, and there is little awareness of the cost-related benefits of occupancy sensors. This is a barrier to the occupancy sensor market since it impacts penetration rates in developing and undeveloped economies.
- Furthermore, the ongoing dispute between Russia and Ukraine is expected to impact the electronics industry significantly. The conflict has already exacerbated the semiconductor supply chain issues and the chip shortage that have affected the industry for some time. The disruption may come in the form of volatile pricing for critical raw materials such as nickel, palladium, copper, titanium, aluminum, and iron ore, resulting in material shortages. This would obstruct the manufacturing of occupancy sensors.

APAC Occupancy Sensors Market Trends

Smart City to Increase the Growth of the Occupancy Sensor Market

- A smart city can create an efficient and smart service delivery platform for public and municipal workers by installing sensors in the city to create platforms that allow the sharing of information. The platform can have a common data warehouse where different sensor systems store their information. A truly smart parking system should be aware of the occupancy status of each parking space and be able to guide the user to it.
- According to Ministry of Finance (India), in financial year 2022, the expenditure on the Smart City Mission in India amounted to around INR 53 billion (USD 641.95 Million), and it is projected to exceed INR 68 billion (USD 823.63 Million) in fiscal year 2023. The mission aims at urban infrastructure transformation with a focus on enhancing the quality of life for citizens through the adoption of technology, data-driven solutions, and effective urban planning.
- Furthermore, traffic congestion caused by vehicles is an alarming problem on a global scale, and it has been growing exponentially. Occupancy sensors, like IoT sensors and ultrasonic sensors, play a major role with the help of edge computing, where traffic patterns may help efficiently manage traffic problems.
- For instance, Thailand 4.0 is an initiative put in place by the Thai government to mitigate climate change and reduce carbon emissions. The government is planning to achieve the mandate of 100 smart cities within 20 years. State-owned utilities will spend up to USD 5.9 billion implementing smart grid projects through 2036. This is expected to drive the growth of the market in the country.
- Moreover, in November 2022, Singapore and China renewed smart city collaboration with digital economy initiatives. This will be the third year of implementation of the smart city initiative, a joint program launched in the previous year, that aims to build stronger digital and business links between the two Asian markets.

India Expected to Witness Significant Market Share

- The largest industry for occupancy sensors is the residential and commercial building industry due to massive growth in the construction sector in India. Technology has a significant role in this sector due to its cost-effective matrix. Further, according to IBEF, India invested USD 2.4 billion in real estate assets over the last year, a 52% increase yearly. From April 2000 - September

2022, FDI in the industry, comprising construction development and operations, totaled USD 55.18 billion. Such a considerable rise in real estate would allow the studied market to grow.
- The growing urbanization rate is also among the contributing factors behind the growth of the Occupancy Sensors industry, as they are more prevalent in urban areas than rural areas. According to the World Bank, about 600 million people will live in metropolitan cities in India by 2036, representing 40% of the population.
- In addition, the country is expected to be driven by the growing demand for energy-saving devices. Occupancy sensors are an essential part of this. The sensors turn off appliances and other equipment depending on the occupancy level. These sensors help to reduce light pollution. They can be used in both indoor and outdoor areas.
- For instance, in recent year, the Indian government imposed new energy rating criteria for air conditioners. The new ratings will be in addition to the BEE's notification of the new parameters governing the application of the country's amended energy consumption standards for air conditioners. The new rules require higher energy efficiency guidelines for 5-star models, which will cause AC prices to rise by at least 10%. Such initiatives would create an opportunity for the studied market to grow.
- Further, the market is witnessing various innovations. For instance, recentkly, Wozart, a Smart Home tech company based in Hyderabad, India, announced the True Occupancy Sensor. True Occupancy Sensor can detect a person even when motionless and standing still. The TrueOccupancy Sensor, installed at the doorway, uses thermal imaging and AI to count the number of people walking in and out of the room while maintaining privacy.
- In addition, government regulations regarding energy efficiency and the use of environment-friendly refrigerants are anticipated to create opportunities for the market over the projection period.? According to NCAER, the penetration rate of the air conditioner demand across the country was estimated to increase to 12.4% in 2026, up from about 5% in the previous years.
- Overall, the Indian occupancy sensor market is set to benefit from ongoing government initiatives promoting green buildings and energy-efficient technologies. Increased awareness about sustainability and cost-saving measures will further drive the adoption of these sensors across various sectors.

APAC Occupancy Sensors Industry Overview

The Asia Pacific Occupancy Sensors Market is moderately competitive. Product launches, high expenditures on research and development, collaborations, and acquisitions are the prime maturing strategies adopted by the organizations in the region to sustain the intense competition. Key players in the market are Signify Holding BV, Texas Instruments Inc., Schneider Electric SE, and others.

In summary, the Asia Pacific occupancy sensors market is set for robust growth due to urbanization, energy efficiency initiatives, and advancements in smart technologies. The increasing integration of IoT solutions will further enhance the functionality and adoption of these devices across various sectors.

Additional Benefits:

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

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