

Asia Pacific Transfer Switches - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia Pacific Transfer Switches Market is expected to register a CAGR of 6.67% during the forecast period.

Key Highlights

- Transfer switches are devices that allow users to transfer between different power sources, most commonly backup generators. It provides numerous industries with assurance, simplicity, and hassle-free continuous and switching power supply. As a result, their growth is influenced and reliant on the power and transmission industries.
- The increasing urbanization and industrialization are developing the need for transfer switches. According to the World Bank, the urbanization rate in Vietnam increased from 36.63% in 2019 to 37.34% in 2020. In addition, in Indonesia, the urbanization rate increased from 55.99% in 2019 to 56.64% in 2020. The increase in urbanization creates a need for modern electrical infrastructure, driving the growth of the market.
- The propelling investments by the vendors operating in the market are also triggering the market's growth. In May 2021, Cummins Inc. introduced its power transfer equipment for mission-critical and life-saving applications, the PowerCommand X-Series transfer switches.
- Available in automatic and non-automatic configurations, the new switches are designed for versatility and offer current ratings from 40 to 3000 amps. They are suitable for a broad range of applications, including commercial retail facilities, healthcare centers, and large data centers. Additionally, the PowerCommand X-Series transfer switches incorporate a newly designed high endurance mechanism (HEM) engineered to accommodate very large current loads for extended periods with no failure or loss of control.
- Further, despite several innovations, these switches are still susceptible to various hazards if not appropriately operated with safety precautions. Electrical shock and burns, fire and explosions, heat build-up, and mechanical hazards are some of the hazards that these switches can cause. Hence, these factors act as certain restraining factors in the studied market.

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APAC Transfer Switches Market Trends

Residential Applications are Observing a Significant Growth

- In terms of electricity demand, Southeast Asia represents the fastest-growing region in the world. Primarily driven by the growing ownership of household appliances and air conditioners, Indonesia (26%), Viet Nam (22%), Thailand (19%), and Malaysia (15%) make up more than 80% of total demand in the region. (SOURCE: IEA 2020 regional focus: Southeast Asia)
- Developments in transfer switches for residential use incorporate multiple sophisticated intelligent and user-friendly features. The one-button access test mode and remote test signal input avoid troubles in acceptance or maintenance. Moreover, the generator signal input and delay function set the stage for intelligent control of the generator as the reserve power supply side. Additionally, fire safety signal input meets the mandatory requirements of fireproof residential buildings.
- For instance, Generac introduced an Automatic Transfer Switch with integrated home energy monitoring capabilities. The launch of the PWRview ATS attracts Home Energy Monitoring System (HEMS) built into the switch. It allows a home equipped with a home standby generator to access powerful, immediately money-saving insights about the home's energy consumption.
- Several ESS projects, from utility-scale to residential, have been developed. The residential segment currently exceeds adoption. On the other hand, the funding grants extended by the Australian Renewable Energy Agency (ARENA) have advanced the development of utility-scale storage. Amongst other APAC countries, Australia is relatively mature for ESS. Most large-scale storage installed are standalone systems, mainly due to the FCAS (frequency response) market.
- The generated electricity will be used on-site through distributed generation instead of transmitting energy over an electric grid. This eliminated the need for a large, centralized solar power facility. Hoymiles, a solar storage producer, highlighted that solar panels could help property owners achieve energy independence and have more control over their power, thus encouraging more people in Japan to install solar panels on the roof of their homes, despite the initial costs.

Automatic Transfer switches Holds the Major Market Share

- The need for uptime in facilities such as factories, data centers, and hospitals is driving the growth of transfer switches. Low-voltage automatic transfer switches transfer essential load connections between primary and alternate electrical power sources.
- The construction of modern data centers which offer high uptime drives the need for power backups. The adoption of generators and batteries can be widely used in such facilities, creating an automatic transfer switch demand.
- ABB, back in 2019, launched its compact automatic transfer switch (ATS) OTM series in China. Representing technology in the application of transferring power sources automatically from one to another, the OTM series offered a safe and reliable power supply for grid terminal loads for such applications as commercial and residential buildings, fire safety, industry, and data centers.
- Schneider Wingoal R&D Center joined forces with Shanghai Zhangjiang R&D Center and brought launched TransferPacT WATSN series transfer switch following the Sihai series. The former recently won the 2021 Red Dot Design Award with its TransferPacT WATSN series automatic transfer switch.
- ATS applications are extended to end-user sectors such as Agriculture, Light Commercial, Healthcare, Financial, Telecommunication, and Data Centre Facilities. Recently, Ravensdown Fertiliser, an Agriculture and Forestry in New Zealand, incorporated an 11 kV Switchboard installed in a container with Relay SEL incorporated. The company faced the challenge of Convection Cooled DC UPS with a seismic-rated cabinet. 38U 5.5kW 400VAC Three Phase Input / 110VDC Output Voltage DC UPS with Battery Backup.

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APAC Transfer Switches Industry Overview

The Asia Pacific Transfer Switch market is moderately consolidated, with many market players cornering a very minimal share in the market. The development of regional markets and increasing shares of local players in foreign direct investments are the major factors promoting the fragmented nature of the market.

- October 2021: Schneider Electric has unveiled its next-generation TransferPacT Automated Transfer Switching Equipment (ATSE) - a family of high-speed, compact, modular intelligent automatic transfer switches that provide a stable backup power supply with greater scalability and reliability. TransferPacT Automatic has simple settings and an easy-to-read UI, but TransferPacT Active Automatic has more features and can connect to an external HMI.
- May 2021: The PowerCommand X-Series transfer switches from Cummins, Inc. are the next generation of reliable power transfer equipment for mission-critical and life-saving applications. With current ratings ranging from 40 amps to 3000 amps, the PowerCommand X-Series transfer switches are built for versatility. The new products have the highest UL1008 time-based and short-time withstand and closure ratings (WCR) in the industry and are offered as transfer switches and service-entrance certified transfer switches.

Additional Benefits:

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

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