

Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Market Growth 2026-2032

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Abstracts

The global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market size is predicted to grow from US\$ 1057 million in 2025 to US\$ 2466 million in 2032; it is expected to grow at a CAGR of 12.6% from 2026 to 2032.

Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers refers to mission-critical power transfer devices installed within the electrical distribution chain of AI training clusters, hyperscale data centers, colocation facilities, enterprise data rooms and other high-availability digital infrastructure. The equipment automatically or rapidly transfers loads between normal and alternate power sources, UPS outputs, generator-backed supplies, dual-bus systems or A/B rack power feeds according to voltage, frequency, phase, load condition and embedded control logic. The scope primarily covers facility-level automatic transfer switches, automatic transfer switching equipment, bypass-isolation ATS, open- and closed-transition ATS, rack-mounted ATS PDUs, static transfer switches, rack-mounted static transfer switches and associated controllers and monitoring modules. Key technical parameters include rated current, rated voltage, short-circuit withstand and closing ratings, transfer time, synchronization control, maintenance bypass, remote monitoring, communication compatibility and high-reliability operation under data-center conditions.

Indicative pricing ranges from several hundred to several thousand US dollars for rack-mounted ATS/rSTS products, several thousand to tens of thousands of US dollars for low-voltage facility ATS equipment, and tens of thousands to more than two hundred thousand US dollars for large-capacity STS or engineered data-center transfer-switching systems.

Based on our research, automatic transfer switching equipment for AI training clusters should not be treated as a newly invented standalone hardware category. It is more accurately understood as a data-center-specific extension of mature ATS, ATSE, STS, rack ATS and rack-mounted static transfer technologies. Its core industry function is to maintain power continuity for high-value computing loads by transferring electrical loads between normal and alternate power sources, UPS outputs, generator-backed supplies and dual A/B distribution paths. Compared with conventional commercial standby power applications, AI training clusters carry much higher economic sensitivity to power interruptions, because a transfer failure may interrupt training jobs, disrupt cluster scheduling, create data-writing risks and increase operational recovery cost.

From the supply side, the market is structured around three groups of participants. The first group consists of global critical-power and low-voltage electrical leaders with strong engineering, standards and project-delivery capabilities. The second group consists of data-center power specialists with strong STS, rack ATS, rack PDU or white-space power-management portfolios. The third group consists of regional low-voltage electrical manufacturers and rack power suppliers, especially in Greater China and other Asian markets. This layered structure explains why the longlist is broader than the core formal list: many companies can manufacture or supply ATS products, but fewer have clear evidence of data-center-grade, AI-infrastructure-oriented product positioning and global project relevance.

From the demand side, growth is being driven less by the number of servers alone and more by the rising redundancy requirements of the entire power path. Higher rack densities, dual-bus architectures, generator-backed distribution, UPS redundancy and the need for remote monitoring all increase the practical value of automatic and static transfer equipment. Rack ATS and rSTS products are likely to benefit from transitional and localized redundancy needs, particularly for single-corded IT devices and edge-style deployments. Facility-level ATS and STS equipment, by contrast, are more strongly linked to hyperscale campuses, colocation facilities, large UPS architectures and mission-critical dual-source distribution.

From the technology perspective, mechanical ATS will remain highly relevant because it is cost-effective, standards-based and widely accepted in electrical engineering practice. Static transfer switches and rack-mounted static transfer products are more specialized but more valuable where fast switching, sensitive load protection and dual-UPS operation are required. The next phase of competition will focus on high withstand and closing ratings, maintenance bypass design, predictive monitoring, communications integration, thermal performance and higher power density. The development of high-

voltage DC distribution, 800V DC architectures and modular AI power systems may gradually reshape the market boundary, but over the medium term ATS and STS equipment will remain foundational components of data-center power continuity.

LP Information, Inc. (LPI) ' newest research report, the "Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Industry Forecast" looks at past sales and reviews total world Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers sales in 2025, providing a comprehensive analysis by region and market sector of projected Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers sales for 2026 through 2032. With Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers industry.

This Insight Report provides a comprehensive analysis of the global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers and breaks down the forecast by Product Function, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Function:

Facility-level Automatic Transfer Switch

Static Transfer Switch

Rack-mounted Transfer Switch

Other

Segmentation by Switching Technology:

Electromechanical ATS

Solid-state STS

Hybrid Transfer Switch

Other

Segmentation by Installation Level:

Building / Facility Power Path

UPS / Dual-bus Distribution Level

Rack / Cabinet Level

Other

Segmentation by Rated Capacity:

Low-capacity Rack Level

Medium-capacity LV Facility Level

High-capacity Critical Power Level

Other

Segmentation by Application:

AI Training Cluster

Hyperscale Data Center

Colocation Data Center

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Schneider Electric

Eaton

Vertiv

ABB

Siemens

Legrand

LayerZero Power Systems

Delta Electronics

Socomec

Piller

Cummins

Rehiko

Generac

Caterpillar

IEM

CyberPower Systems

nVent

Austin Hughes

Huawei Digital Power

CHINT

Delixi Electric

People Electric

GEYA Electrical

Kutai Electronics

Shihlin Electric

Thycon

Soltec

Camsco

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market?

What factors are driving Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers market opportunities vary by end market size?

How does Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers break out by Product Function, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers by Country/Region, 2021, 2025 & 2032

2.2 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Segment by Product Function

2.2.1 Facility-level Automatic Transfer Switch

2.2.2 Static Transfer Switch

2.2.3 Rack-mounted Transfer Switch

2.2.4 Other

2.2.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function

2.2.5.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Product Function (2021-2026)

2.2.5.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue and Market Share by Product Function (2021-2026)

2.2.5.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Product Function (2021-2026)

2.3 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Segment by Switching Technology

2.3.1 Electromechanical ATS

2.3.2 Solid-state STS

2.3.3 Hybrid Transfer Switch

2.3.4 Other

2.3.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Switching Technology

2.3.5.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Switching Technology (2021-2026)

2.3.5.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue and Market Share by Switching Technology (2021-2026)

2.3.5.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Switching Technology (2021-2026)

2.4 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Segment by Installation Level

2.4.1 Building / Facility Power Path

2.4.2 UPS / Dual-bus Distribution Level

2.4.3 Rack / Cabinet Level

2.4.4 Other

2.4.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Installation Level

2.4.5.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Installation Level (2021-2026)

2.4.5.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue and Market Share by Installation Level (2021-2026)

2.4.5.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Installation Level (2021-2026)

2.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Segment by Rated Capacity

2.5.1 Low-capacity Rack Level

2.5.2 Medium-capacity LV Facility Level

2.5.3 High-capacity Critical Power Level

2.5.4 Other

2.5.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Rated Capacity

2.5.5.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Rated Capacity (2021-2026)

2.5.5.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue and Market Share by Rated Capacity (2021-2026)

2.5.5.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Rated Capacity (2021-2026)

2.6 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Segment by Application

2.6.1 AI Training Cluster

2.6.2 Hyperscale Data Center

2.6.3 Colocation Data Center

2.6.4 Other

2.6.5 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application

2.6.5.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Market Share by Application (2021-2026)

2.6.5.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue and Market Share by Application (2021-2026)

2.6.5.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Breakdown Data by Company

3.1.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales by Company (2021-2026)

3.1.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Company (2021-2026)

3.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue by Company (2021-2026)

3.2.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Company (2021-2026)

3.2.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Company (2021-2026)

3.3 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Company

3.4 Key Manufacturers Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Location Distribution

3.4.2 Players Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

- 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMATIC TRANSFER SWITCHING EQUIPMENT FOR AI TRAINING CLUSTERS AND DATA CENTERS BY GEOGRAPHIC REGION

- 4.1 World Historic Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Growth
- 4.4 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Growth
- 4.5 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Growth
- 4.6 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Growth

5 AMERICAS

- 5.1 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country
 - 5.1.1 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026)
 - 5.1.2 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country (2021-2026)
- 5.2 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026)

5.3 Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Region

6.1.1 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Region (2021-2026)

6.1.2 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Region (2021-2026)

6.2 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026)

6.3 APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers by Country

7.1.1 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026)

7.1.2 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country (2021-2026)

7.2 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026)

7.3 Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers by Country

8.1.1 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026)

8.1.2 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country (2021-2026)

8.2 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026)

8.3 Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

10.3 Manufacturing Process Analysis of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

10.4 Industry Chain Structure of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Distributors

11.3 Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Customer

12 WORLD FORECAST REVIEW FOR AUTOMATIC TRANSFER SWITCHING EQUIPMENT FOR AI TRAINING CLUSTERS AND DATA CENTERS BY GEOGRAPHIC REGION

12.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Market Size Forecast by Region

12.1.1 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Forecast by Region (2027-2032)

12.1.2 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Forecast by Product Function (2027-2032)

12.7 Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Schneider Electric

13.1.1 Schneider Electric Company Information

13.1.2 Schneider Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.1.3 Schneider Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Schneider Electric Main Business Overview

- 13.1.5 Schneider Electric Latest Developments
- 13.2 Eaton
 - 13.2.1 Eaton Company Information
 - 13.2.2 Eaton Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.2.3 Eaton Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Eaton Main Business Overview
 - 13.2.5 Eaton Latest Developments
- 13.3 Vertiv
 - 13.3.1 Vertiv Company Information
 - 13.3.2 Vertiv Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.3.3 Vertiv Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Vertiv Main Business Overview
 - 13.3.5 Vertiv Latest Developments
- 13.4 ABB
 - 13.4.1 ABB Company Information
 - 13.4.2 ABB Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.4.3 ABB Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 ABB Main Business Overview
 - 13.4.5 ABB Latest Developments
- 13.5 Siemens
 - 13.5.1 Siemens Company Information
 - 13.5.2 Siemens Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.5.3 Siemens Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Siemens Main Business Overview
 - 13.5.5 Siemens Latest Developments
- 13.6 Legrand
 - 13.6.1 Legrand Company Information
 - 13.6.2 Legrand Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.6.3 Legrand Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.6.4 Legrand Main Business Overview
- 13.6.5 Legrand Latest Developments
- 13.7 LayerZero Power Systems
 - 13.7.1 LayerZero Power Systems Company Information
 - 13.7.2 LayerZero Power Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.7.3 LayerZero Power Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 LayerZero Power Systems Main Business Overview
 - 13.7.5 LayerZero Power Systems Latest Developments
- 13.8 Delta Electronics
 - 13.8.1 Delta Electronics Company Information
 - 13.8.2 Delta Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.8.3 Delta Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Delta Electronics Main Business Overview
 - 13.8.5 Delta Electronics Latest Developments
- 13.9 Socomec
 - 13.9.1 Socomec Company Information
 - 13.9.2 Socomec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.9.3 Socomec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Socomec Main Business Overview
 - 13.9.5 Socomec Latest Developments
- 13.10 Piller
 - 13.10.1 Piller Company Information
 - 13.10.2 Piller Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications
 - 13.10.3 Piller Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Piller Main Business Overview
 - 13.10.5 Piller Latest Developments
- 13.11 Cummins
 - 13.11.1 Cummins Company Information
 - 13.11.2 Cummins Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.11.3 Cummins Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Cummins Main Business Overview

13.11.5 Cummins Latest Developments

13.12 Rehlko

13.12.1 Rehlko Company Information

13.12.2 Rehlko Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.12.3 Rehlko Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Rehlko Main Business Overview

13.12.5 Rehlko Latest Developments

13.13 Generac

13.13.1 Generac Company Information

13.13.2 Generac Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.13.3 Generac Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Generac Main Business Overview

13.13.5 Generac Latest Developments

13.14 Caterpillar

13.14.1 Caterpillar Company Information

13.14.2 Caterpillar Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.14.3 Caterpillar Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Caterpillar Main Business Overview

13.14.5 Caterpillar Latest Developments

13.15 IEM

13.15.1 IEM Company Information

13.15.2 IEM Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.15.3 IEM Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 IEM Main Business Overview

13.15.5 IEM Latest Developments

13.16 CyberPower Systems

13.16.1 CyberPower Systems Company Information

13.16.2 CyberPower Systems Automatic Transfer Switching Equipment for AI Training

Clusters and Data Centers Product Portfolios and Specifications

13.16.3 CyberPower Systems Automatic Transfer Switching Equipment for AI Training
Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 CyberPower Systems Main Business Overview

13.16.5 CyberPower Systems Latest Developments

13.17 nVent

13.17.1 nVent Company Information

13.17.2 nVent Automatic Transfer Switching Equipment for AI Training Clusters and
Data Centers Product Portfolios and Specifications

13.17.3 nVent Automatic Transfer Switching Equipment for AI Training Clusters and
Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 nVent Main Business Overview

13.17.5 nVent Latest Developments

13.18 Austin Hughes

13.18.1 Austin Hughes Company Information

13.18.2 Austin Hughes Automatic Transfer Switching Equipment for AI Training
Clusters and Data Centers Product Portfolios and Specifications

13.18.3 Austin Hughes Automatic Transfer Switching Equipment for AI Training
Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Austin Hughes Main Business Overview

13.18.5 Austin Hughes Latest Developments

13.19 Huawei Digital Power

13.19.1 Huawei Digital Power Company Information

13.19.2 Huawei Digital Power Automatic Transfer Switching Equipment for AI Training
Clusters and Data Centers Product Portfolios and Specifications

13.19.3 Huawei Digital Power Automatic Transfer Switching Equipment for AI Training
Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Huawei Digital Power Main Business Overview

13.19.5 Huawei Digital Power Latest Developments

13.20 CHINT

13.20.1 CHINT Company Information

13.20.2 CHINT Automatic Transfer Switching Equipment for AI Training Clusters and
Data Centers Product Portfolios and Specifications

13.20.3 CHINT Automatic Transfer Switching Equipment for AI Training Clusters and
Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 CHINT Main Business Overview

13.20.5 CHINT Latest Developments

13.21 Delixi Electric

13.21.1 Delixi Electric Company Information

13.21.2 Delixi Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.21.3 Delixi Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Delixi Electric Main Business Overview

13.21.5 Delixi Electric Latest Developments

13.22 People Electric

13.22.1 People Electric Company Information

13.22.2 People Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.22.3 People Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 People Electric Main Business Overview

13.22.5 People Electric Latest Developments

13.23 GEYA Electrical

13.23.1 GEYA Electrical Company Information

13.23.2 GEYA Electrical Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.23.3 GEYA Electrical Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 GEYA Electrical Main Business Overview

13.23.5 GEYA Electrical Latest Developments

13.24 Kutai Electronics

13.24.1 Kutai Electronics Company Information

13.24.2 Kutai Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.24.3 Kutai Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Kutai Electronics Main Business Overview

13.24.5 Kutai Electronics Latest Developments

13.25 Shihlin Electric

13.25.1 Shihlin Electric Company Information

13.25.2 Shihlin Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.25.3 Shihlin Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Shihlin Electric Main Business Overview

13.25.5 Shihlin Electric Latest Developments

13.26 Thycon

13.26.1 Thycon Company Information

13.26.2 Thycon Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.26.3 Thycon Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 Thycon Main Business Overview

13.26.5 Thycon Latest Developments

13.27 Soltec

13.27.1 Soltec Company Information

13.27.2 Soltec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.27.3 Soltec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.27.4 Soltec Main Business Overview

13.27.5 Soltec Latest Developments

13.28 Camsco

13.28.1 Camsco Company Information

13.28.2 Camsco Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

13.28.3 Camsco Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.28.4 Camsco Main Business Overview

13.28.5 Camsco Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Facility-level Automatic Transfer Switch
- Table 4. Major Players of Static Transfer Switch
- Table 5. Major Players of Rack-mounted Transfer Switch
- Table 6. Major Players of Other
- Table 7. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026) & (Units)
- Table 8. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Product Function (2021-2026)
- Table 9. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Product Function (2021-2026) & (\$ million)
- Table 10. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Product Function (2021-2026)
- Table 11. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Product Function (2021-2026) & (US\$/Unit)
- Table 12. Major Players of Electromechanical ATS
- Table 13. Major Players of Solid-state STS
- Table 14. Major Players of Hybrid Transfer Switch
- Table 15. Major Players of Other
- Table 16. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Switching Technology (2021-2026) & (Units)
- Table 17. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Switching Technology (2021-2026)
- Table 18. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Switching Technology (2021-2026) & (\$ million)
- Table 19. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Switching Technology (2021-2026)
- Table 20. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Switching Technology (2021-2026) & (US\$/Unit)
- Table 21. Major Players of Building / Facility Power Path
- Table 22. Major Players of UPS / Dual-bus Distribution Level
- Table 23. Major Players of Rack / Cabinet Level

Table 24. Major Players of Other

Table 25. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Installation Level (2021-2026) & (Units)

Table 26. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Installation Level (2021-2026)

Table 27. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Installation Level (2021-2026) & (\$ million)

Table 28. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Installation Level (2021-2026)

Table 29. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Installation Level (2021-2026) & (US\$/Unit)

Table 30. Major Players of Low-capacity Rack Level

Table 31. Major Players of Medium-capacity LV Facility Level

Table 32. Major Players of High-capacity Critical Power Level

Table 33. Major Players of Other

Table 34. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Rated Capacity (2021-2026) & (Units)

Table 35. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Rated Capacity (2021-2026)

Table 36. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Rated Capacity (2021-2026) & (\$ million)

Table 37. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Rated Capacity (2021-2026)

Table 38. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Rated Capacity (2021-2026) & (US\$/Unit)

Table 39. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale by Application (2021-2026) & (Units)

Table 40. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Market Share by Application (2021-2026)

Table 41. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Application (2021-2026) & (\$ million)

Table 42. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Application (2021-2026)

Table 43. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Application (2021-2026) & (US\$/Unit)

Table 44. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Company (2021-2026) & (Units)

Table 45. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Company (2021-2026)

Table 46. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Company (2021-2026) & (\$ millions)

Table 47. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Company (2021-2026)

Table 48. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sale Price by Company (2021-2026) & (US\$/Unit)

Table 49. Key Manufacturers Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Producing Area Distribution and Sales Area

Table 50. Players Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Products Offered

Table 51. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 52. New Products and Potential Entrants

Table 53. Market M&A Activity & Strategy

Table 54. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Geographic Region (2021-2026) & (Units)

Table 55. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share Geographic Region (2021-2026)

Table 56. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 57. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Geographic Region (2021-2026)

Table 58. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country/Region (2021-2026) & (Units)

Table 59. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Country/Region (2021-2026)

Table 60. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country/Region (2021-2026) & (\$ millions)

Table 61. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Country/Region (2021-2026)

Table 62. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026) & (Units)

Table 63. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Country (2021-2026)

Table 64. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country (2021-2026) & (\$ millions)

Table 65. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026) & (Units)

Table 66. Americas Automatic Transfer Switching Equipment for AI Training Clusters

and Data Centers Sales by Application (2021-2026) & (Units)

Table 67. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Region (2021-2026) & (Units)

Table 68. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Region (2021-2026)

Table 69. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Region (2021-2026) & (\$ millions)

Table 70. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026) & (Units)

Table 71. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026) & (Units)

Table 72. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026) & (Units)

Table 73. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue by Country (2021-2026) & (\$ millions)

Table 74. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026) & (Units)

Table 75. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026) & (Units)

Table 76. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Country (2021-2026) & (Units)

Table 77. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Country (2021-2026)

Table 78. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Product Function (2021-2026) & (Units)

Table 79. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Application (2021-2026) & (Units)

Table 80. Key Market Drivers & Growth Opportunities of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

Table 81. Key Market Challenges & Risks of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

Table 82. Key Industry Trends of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

Table 83. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Raw Material

Table 84. Key Suppliers of Raw Materials

Table 85. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Distributors List

Table 86. Automatic Transfer Switching Equipment for AI Training Clusters and Data

Centers Customer List

Table 87. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Region (2027-2032) & (Units)

Table 88. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 89. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 90. Americas Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Region (2027-2032) & (Units)

Table 92. APAC Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 93. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 94. Europe Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 95. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 96. Middle East & Africa Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 97. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Product Function (2027-2032) & (Units)

Table 98. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Forecast by Product Function (2027-2032) & (\$ millions)

Table 99. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Forecast by Application (2027-2032) & (Units)

Table 100. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 101. Schneider Electric Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 102. Schneider Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 103. Schneider Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Schneider Electric Main Business

Table 105. Schneider Electric Latest Developments

Table 106. Eaton Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 107. Eaton Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 108. Eaton Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. Eaton Main Business

Table 110. Eaton Latest Developments

Table 111. Vertiv Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 112. Vertiv Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 113. Vertiv Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. Vertiv Main Business

Table 115. Vertiv Latest Developments

Table 116. ABB Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 117. ABB Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 118. ABB Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. ABB Main Business

Table 120. ABB Latest Developments

Table 121. Siemens Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 122. Siemens Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 123. Siemens Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Siemens Main Business

Table 125. Siemens Latest Developments

Table 126. Legrand Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 127. Legrand Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 128. Legrand Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. Legrand Main Business

Table 130. Legrand Latest Developments

Table 131. LayerZero Power Systems Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 132. LayerZero Power Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 133. LayerZero Power Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. LayerZero Power Systems Main Business

Table 135. LayerZero Power Systems Latest Developments

Table 136. Delta Electronics Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 137. Delta Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 138. Delta Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Delta Electronics Main Business

Table 140. Delta Electronics Latest Developments

Table 141. Socomec Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 142. Socomec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 143. Socomec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. Socomec Main Business

Table 145. Socomec Latest Developments

Table 146. Piller Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 147. Piller Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 148. Piller Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 149. Piller Main Business

Table 150. Piller Latest Developments

Table 151. Cummins Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 152. Cummins Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 153. Cummins Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 154. Cummins Main Business

Table 155. Cummins Latest Developments

Table 156. Rehlko Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 157. Rehlko Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 158. Rehlko Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 159. Rehlko Main Business

Table 160. Rehlko Latest Developments

Table 161. Generac Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 162. Generac Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 163. Generac Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross

Margin (2021-2026)

Table 164. Generac Main Business

Table 165. Generac Latest Developments

Table 166. Caterpillar Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 167. Caterpillar Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 168. Caterpillar Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 169. Caterpillar Main Business

Table 170. Caterpillar Latest Developments

Table 171. IEM Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 172. IEM Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 173. IEM Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 174. IEM Main Business

Table 175. IEM Latest Developments

Table 176. CyberPower Systems Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 177. CyberPower Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 178. CyberPower Systems Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 179. CyberPower Systems Main Business

Table 180. CyberPower Systems Latest Developments

Table 181. nVent Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 182. nVent Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 183. nVent Automatic Transfer Switching Equipment for AI Training Clusters and

Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 184. nVent Main Business

Table 185. nVent Latest Developments

Table 186. Austin Hughes Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 187. Austin Hughes Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 188. Austin Hughes Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 189. Austin Hughes Main Business

Table 190. Austin Hughes Latest Developments

Table 191. Huawei Digital Power Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 192. Huawei Digital Power Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 193. Huawei Digital Power Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 194. Huawei Digital Power Main Business

Table 195. Huawei Digital Power Latest Developments

Table 196. CHINT Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 197. CHINT Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 198. CHINT Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 199. CHINT Main Business

Table 200. CHINT Latest Developments

Table 201. Delixi Electric Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 202. Delixi Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 203. Delixi Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 204. Delixi Electric Main Business

Table 205. Delixi Electric Latest Developments

Table 206. People Electric Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 207. People Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 208. People Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 209. People Electric Main Business

Table 210. People Electric Latest Developments

Table 211. GEYA Electrical Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 212. GEYA Electrical Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 213. GEYA Electrical Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 214. GEYA Electrical Main Business

Table 215. GEYA Electrical Latest Developments

Table 216. Kutai Electronics Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 217. Kutai Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 218. Kutai Electronics Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 219. Kutai Electronics Main Business

Table 220. Kutai Electronics Latest Developments

Table 221. Shihlin Electric Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 222. Shihlin Electric Automatic Transfer Switching Equipment for AI Training

Clusters and Data Centers Product Portfolios and Specifications

Table 223. Shihlin Electric Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 224. Shihlin Electric Main Business

Table 225. Shihlin Electric Latest Developments

Table 226. Thycon Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 227. Thycon Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 228. Thycon Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 229. Thycon Main Business

Table 230. Thycon Latest Developments

Table 231. Soltec Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 232. Soltec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 233. Soltec Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 234. Soltec Main Business

Table 235. Soltec Latest Developments

Table 236. Camsco Basic Information, Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 237. Camsco Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Product Portfolios and Specifications

Table 238. Camsco Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 239. Camsco Main Business

Table 240. Camsco Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers

Figure 2. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Country/Region (2025)

Figure 10. Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Facility-level Automatic Transfer Switch

Figure 12. Product Picture of Static Transfer Switch

Figure 13. Product Picture of Rack-mounted Transfer Switch

Figure 14. Product Picture of Other

Figure 15. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Product Function in 2026

Figure 16. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Product Function (2021-2026)

Figure 17. Product Picture of Electromechanical ATS

Figure 18. Product Picture of Solid-state STS

Figure 19. Product Picture of Hybrid Transfer Switch

Figure 20. Product Picture of Other

Figure 21. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Switching Technology in 2026

Figure 22. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Switching Technology (2021-2026)

Figure 23. Product Picture of Building / Facility Power Path

Figure 24. Product Picture of UPS / Dual-bus Distribution Level

Figure 25. Product Picture of Rack / Cabinet Level

Figure 26. Product Picture of Other

Figure 27. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Installation Level in 2026

Figure 28. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Revenue Market Share by Installation Level (2021-2026)

Figure 29. Product Picture of Low-capacity Rack Level

Figure 30. Product Picture of Medium-capacity LV Facility Level

Figure 31. Product Picture of High-capacity Critical Power Level

Figure 32. Product Picture of Other

Figure 33. Global Automatic Transfer Switching Equipment for AI Training Clusters and Data Centers Sales Market Share by Rated Capacity in 2026

Figure 34. Glo

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