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Data Center Transfer Switches and Switchgears Market Forecasts to 2030 – Global Analysis by Product (Transfer Switches and Switchgears), Data Center Type, Voltage, Deployment, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Data Center Transfer Switches and Switchgears Market is accounted for $3.34 billion in 2024 and is expected to reach $6.32 billion by 2030 growing at a CAGR of 11.2% during the forecast period. Data Center Transfer Switches and Switchgear are key components of a data center's power infrastructure, guaranteeing reliable power supply and operating safety. Transfer switches reduce downtime during outages by facilitating smooth changeover between primary and backup power sources, such generators. Conversely, switchgear isolates faults and ensures secure energy distribution to manage, regulate, and safeguard electrical systems. These systems are built to be dependable and efficient even under large power demands.

According to Baxtel Analysis, Asia Pacific had 799 data center facilities in 2023, with a total area of 38,498,087 square feet and 7,031 megawatts of power capacity.

Market Dynamics:

Driver:

Increase in Data Traffic & Cloud Computing

The rise in data traffic and the expansion of cloud computing driving demand for more resilient and scalable data center infrastructure. Effective power management systems,

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such as transfer switches and switchgear, are essential as businesses grow their digital operations in order to guarantee consistent uptime and dependability. The market for these technologies is expected to expand due to the growing demand for sophisticated power solutions that can handle heavier loads, reduce downtime, and ensure a consistent power supply, a result of the surge in data processing, thus it propels the market expansion.

Restraint:

High Initial Investment

The expensive initial investment necessary for modern transfer switches and switchgears is a considerable obstacle, especially for small and medium-sized data centers with tight budgets. Many prospective purchasers are put off by this expense, which covers procurement, installation, and integration with current systems. Additionally, companies can put other important infrastructure improvements ahead of power systems, which would impede market expansion and acceptance. This problem is even worse in developing nations when funding for cutting-edge technologies is limited.

Opportunity:

Energy Efficiency and Sustainability Initiatives

Energy efficiency and environmental goals are propelling the Data Center Transfer Switches and Switchgears Market, pushing the use of innovative power management technologies. Data centers are spending more in high-efficiency transfer switches and switchgear that optimize power utilization and guarantee dependable operations as they work to lower energy consumption and carbon footprints. Energy-efficient solutions are a major market driver since these systems assist data centers in meeting environmental standards, reducing operating expenses, and enhancing overall sustainability, thus it drives growth of the market.

Threat:

Complexity in Integration

The complexity of integration is a significant hurdle in the Data Center Transfer Switches and Switchgear Market, increasing setup time and costs. Organizations are

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discouraged from implementing new systems because compatibility difficulties with current power infrastructure frequently need significant adaptation and specialized knowledge. Especially for smaller data centers with less resources and technological know-how, this complexity can result in deployment delays, operating interruptions, and increased maintenance costs.

Covid-19 Impact:

The COVID-19 pandemic accelerated the demand for data centers due to increased digital activities, remote work, and online services, positively impacting the Data Center Transfer Switches and Switchgears Market. However, supply chain disruptions and labor shortages temporarily hindered production and deployment. Despite these challenges, the surge in digital transformation and heightened focus on reliable power infrastructure drove market growth, highlighting the critical role of these systems in data center resilience.

The switchgears segment is expected to be the largest during the forecast period

The switchgears segment is expected to be the largest during the forecast period because data center dependability and operational safety are improved by their capacity to shield equipment from overloads, short circuits, and power outages. In line with sustainability objectives, advanced switchgear technologies like smart and modular systems increase energy efficiency and make maintenance easier. The market adoption of switchgear is greatly accelerated by this crucial feature as well as the rising need for high-performance data centers.

The healthcare segment is expected to have the highest CAGR during the forecast period

The healthcare segment is expected to have the highest CAGR during the forecast period due to its increasing reliance on digital technologies, such as telemedicine, electronic health records, and AI-based diagnostics. These applications require robust and reliable data centers to ensure uninterrupted access to critical data. Healthcare facilities prioritize high power reliability and zero downtime, making advanced transfer switches and switchgears essential for maintaining operational continuity. The growing adoption of IoT-enabled medical devices further amplifies the need for resilient data center power infrastructure in healthcare.

Region with largest share:

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North America is projected to hold the largest market share during the forecast period due to the growth of cloud computing, edge computing, and IoT applications. The presence of major hyperscale data center operators and increasing demand for reliable power systems enhance market growth. Additionally, stringent government regulations on energy efficiency and power reliability encourage investments in advanced systems. The rise in 5G deployment and digital transformation across industries further propels the demand for these critical power management solutions.

Region with highest CAGR:

Asia Pacific is projected to witness the highest CAGR over the forecast period due to the quickening pace of digital transformation and the growth of cloud computing services. Growing internet penetration, e-commerce, and streaming services are driving large investments in hyperscale and colocation data centers. The requirement for dependable power systems is further supported by government measures that promote digital infrastructure and rising energy consumption. Furthermore, the need for sophisticated transfer switches and switchgear to ensure continuous operations is increased by the rise in 5G adoption and smart city initiatives.

Key players in the market

Some of the key players in Data Center Transfer Switches and Switchgears market include ABB Ltd., Caterpillar Inc., Cummins Inc., Eaton Corporation, Fuji Electric, General Electric (GE), Hitachi Energy, Hyundai Electric & Energy Systems, Kohler Co., Larsen & Toubro (L&T), Legrand, Mitsubishi Electric Corporation, Powell Industries, Schneider Electric, Siemens AG, Socomec Group, Toshiba International Corporation and Vertiv Group Corporation.

Key Developments:

In May 2024, ABB expanded electrification portfolio with acquisition of Siemens' Wiring Accessories business. The acquisition had broadened ABB's market reach and complements its regional customer offering within smart buildings.

In February 2024, ABB announced an agreement to acquire SEAM Group, a major provider of energized asset management. The acquisition brought significant additional expertise to customers in the areas of predictive, preventive, and corrective maintenance.

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In January 2024, ABB announced to acquire Canadian company Real Tech, a leading supplier of innovative optical sensor technology that enables real-time water monitoring. Through the acquisition, ABB expands its strong presence in the water segment and complement its product portfolio with optical technology critical for smart water management.

Products Covered:

- Transfer Switches
- Switchgears

Data Center Types Covered:

- Enterprise Data Centers
- Hyperscale Data Centers
- Colocation Data Centers
- Edge Data Centers

Voltages Covered:

- Low Voltage
- Medium Voltage
- High Voltage

Deployments Covered:

- On-Premises
- Cloud-Based

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End Users Covered:

- IT and Telecom
- Banking, Financial Services, and Insurance (BFSI)
- Government and Defense
- Energy
- Healthcare
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain

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- Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
  - Argentina
  - Brazil
  - Chile
  - Rest of South America
- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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