

Electric Drives Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Electric Drives Market Report

The electric drives market by revenue is expected to grow at a CAGR of over 4.6% during the period 2021–2026.

The global market is expected to grow during the forecast period with the growth in industrial production, enhancement in technological advancement, increase in urbanization, and expansion of industries. Owing to the high energy cost associated with industrial motors, several players in end-user industries are focusing on incorporating energy-efficient techniques. Electric drives are one such variety of technology that delivers a highly-efficient production process at a low cost. As the electricity consumption is the major cost component across end-user industries, the demand for electric drives is expected to increase at a considerable rate during the forecast period. Furthermore, the increasing awareness and stringent government regulations on energy savings are fueling the demand for electric drives across the globe.

The following factors are likely to contribute to the growth of the electric drives market during the forecast period:

High Future Potential for Integrated Motor Drives (IMD)

The advent of IIoT in Electric Drives Market

Significant Demand for AC Drives

Growing Demand for Renewable Energy

The study considers the present scenario of the electric drives market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Electric Drives Market Segmentation

The global electric drives market research report includes a detailed segmentation by product type, sales channel, voltage, end-user, geography. Alternate current (AC) electric drives held over 80% of the electric drives market share in 2020. The market is highly fragmented due to the presence of several global and regional players. Several incentive programs in the US and European countries for the early replacement of low-efficient electric motors is expected to boost the demand for AC drives. However, these regions could not witness high growth owing to the shift of manufacturing plants of several motor vehicles and electronic appliances to Asian countries. APAC is expected to witness significant growth over the next few years owing to the increasing purchasing power, continuous production of AC motor-driven applications, and developing economies in India, China, and others. Moreover, the recent trend of the industrial internet of things (IIoT), Big Data, and other technological advancements is promoting huge competition in the global market.

The demand for low-voltage electric drives is driving by increased applications in several end-user industries and the ability to be cost efficient. However, strict government regulations regarding the application are favorably affecting the market growth. Retrofitting activities with regards to low-voltage electric drives are extremely high across industrial as well as commercial enterprises. This, in turn, is expected to boost the demand for low-voltage electric drives during the forecast period. Owing to the increasing implementation of low-energy systems, coupled with easy installation and availability of compact sizes, are the key features driving the electric drives demand.

The expansion and investments in oil & gas, chemical, mining, and other industries in the Middle East, North America, and APAC are expected to increase electric drives demand in the coming years. Thus, the demand for drives in several industrial applications is anticipated to grow. Further, the current uncertainty over the macro-

outlook for the global economy has been reduced by the recent COVID-19 outbreak and has affected the market, thus developing a challenge for the motor market growth in the short term. The end-user industry demand for electric drives has been adversely affected in 2020 on account of the COVID-19 outbreak. Technological advances in drives and industrial revolution are strongly supporting the growth of the industry, however, due to the ongoing pandemic, the demand for metals has become highly uncertain. Owing to the significant usage of drives in several applications in the food processing industry across the globe, the demand for electric drives is expected to grow at a significant rate during the forecast period.

Direct sales hold a prominent share in the market as they offer scope for strategic partnerships between vendors and OEMs, thereby helping to reduce operational costs for OEMs. APAC and Europe are expected to dominate the share of direct electric drives sales owing to the high popularity of direct selling in the region. However, India and China are expected to witness the highest growth in direct sales owing to rapidly growing industrialization during the forecast period. Indirect sales hold a low share in the market majorly due to increased operational cost and rising awareness of traceability among buyers. Indirect networks relieve the manufacturer from start-up expenses, they are better to handle than direct delivery networks.

Product Type

AC

DC

Sales Channel

Direct Sales

Indirect Sales

Voltage

Low

Medium

End-User

F&B

Metal & Mining

Chemicals

Oil & Gas

Power Generation

Packaging

Cement

Textile

Water & Wastewater

Paper & Pulp

Rubber & Plastic

Forestry & Woodwork

Others

INSIGHTS BY GEOGRAPHY

APAC accounts for the highest share of the global electric drive market due to rapidly increasing urbanization and industrialization in the region. Continuous industrial automation in manufacturing, construction, power generation, and mining end-users are significantly increasing, which is increasing the application of electric drives.

Urbanization and industrialization in emerging countries such as India, China, and other countries in Southeast Asia are driving the demand for vehicles, which, in turn, is boosting the demand for electric drives from the automotive industry. However, the

breakout of the COVID-19 pandemic affected the growth prospects of the industry. The growth in China witnessed a decline from around 6% in 2019 to 1–1.5% by the end of 2020. The production in chemical manufacturing units in China declined by over 15–20% in 2020, which is expected to negatively impact the demand for electric drives from the chemical & petrochemical industry. Similarly, the oil & gas industry has been one of the most adversely affected globally and oil & gas production in the APAC region has been badly hit. However, post-COVID the global economy, as well as the production in end-user industries, is expected to recover, which is likely to drive the demand for electric drives.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

India

Australia

Latin America

Brazil

Mexico

Chile

Rest of Latin America

Middle East & Africa

Saudi Arabia

Turkey

Rest of Middle East

INSIGHTS BY VENDORS

Siemens, ABB, Schneider Electric, Emerson Electric, Mitsubishi Electric, and Danfoss are the major vendors in the global electric drive market. These vendors offer high-quality reliable devices with technological advancement. However, the cost of drives remains high face intense competition from small vendors that provide low-quality products at an inexpensive price. The competition is likely to intensify due to the rise in merger and acquisition activities. Major vendors are expected to acquire small- and medium-scale vendors to enhance their market presence and expand their product portfolios.

Prominent Vendors

ABB

Danfoss

Emerson Electric

Fuji Electric

Mitsubishi Electric

Parker-Hannifin Corporation

Siemens

Rockwell Automation

Schneider Electric

WEG

Nidec Corporation

Yasakawa Electric

Other Prominent Vendors

Hiconics Drive Technology

Inovance Technology

KEB Automation

Sew-Eurodrive

Teco Westinghouse

Toshiba International Corporation

KEY QUESTIONS ANSWERED

1. What is the growth rate of the electric drives market during the forecast period?
2. What are the major technological advancements in the global electric drives market?
3. Which is the largest revenue-generating region in the market?

4. Who are the key players in the market? What are the challenges faced by the vendors?
5. Which are the most revenue-generating end-user segments in the global electric drives market?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.1.1 Inclusions

4.1.2 Exclusions

4.2 Base Year

4.3 Scope of The Study

4.3.1 Market Segmentation by Product Type

4.3.2 Market Segmentation by Sales Channel

4.3.3 Market Segmentation by Voltage

4.3.4 Market Segmentation by End-User

4.3.5 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Overview

7.1.1 Key Insights

7.2 Industry Outlook

7.3 Risk & Challenge Analysis

7.3.1 Lack of sufficient regulations on inefficient motors and electric drives

7.3.2 Disruption in the steel and semiconductor industry

7.3.3 Reduced activities in metal & mining and oil & gas industry

7.4 Supply Chain Risks

7.5 FAQ

7.5.1 What are the key developments anticipated to take place in the electric drives market from 2020 to 2026

7.5.2 What are the crucial strategies adopted by players operating in the Electric Drives market

7.5.3 Which end-user industries will remain key contributors to the growth of the electric drives market

7.6 Impact Of COVID-19

7.6.1 Key Points

8 MARKET OPPORTUNITIES & TRENDS

8.1 Future Potential For Integrated Motor Drive (IMD)

8.2 Advent Of IIOT In Electric Drives Market

9 MARKET GROWTH ENABLERS

9.1 Significant Demand For AC Drives Or VFD

9.2 Increasing Adoption Of Automation

9.3 Growing Demand For Renewable Energy

10 MARKET RESTRAINTS

10.1 Unstable Demand From Oil & Gas Industry

10.2 Trade Conflicts Between The US & China

11 MARKET LANDSCAPE

11.1 Market Overview

11.1.1 Key Insights

11.1.2 Mega Trends

11.1.3 Demand Insights

11.2 Market Size & Forecast

11.3 Five Forces Analysis

11.3.1 Threat of New Entrants

11.3.2 Bargaining Power of Suppliers

11.3.3 Bargaining Power of Buyers

11.3.4 Threat of Substitutes

11.3.5 Competitive Rivalry

12 PRODUCT TYPE

12.1 Market Snapshot & Growth Engine

12.2 Market Overview

12.3 AC Drives

12.3.1 Market Overview

12.3.2 Key Insights

12.3.3 Impact of COVID-19 and Challenges

12.3.4 Market Size & Forecast

12.3.5 Market by Geography

12.4 DC Drives

12.4.1 Market Overview

12.4.2 Key Insights

12.4.3 Impact of COVID-19 and Challenges

12.4.4 Market Size & Forecast

12.4.5 Market by Geography

13 VOLTAGE

13.1 Market Snapshot & Growth Engine

13.2 Market Overview

13.3 Low Voltage Electric Drives

13.3.1 Market Overview

13.3.2 Key Insights

13.3.3 Pricing & Demand Analysis

13.3.4 Market Size & Forecast

13.3.5 Market by Geography

13.4 Medium Voltage Electric Drives

13.4.1 Market Overview

13.4.2 Key Insights

13.4.3 Sales Channel Insights

13.4.4 Market Size & Forecast

13.4.5 Market by Geography

14 SALES CHANNEL

14.1 Market Snapshot & Growth Engine

14.2 Market Overview

14.3 Direct Sales

14.3.1 Market Overview

14.3.2 Market Size & Forecast

14.3.3 Market by Geography

14.4 Indirect Sales

14.4.1 Market Overview

14.4.2 Market Size & Forecast

14.4.3 Market by Geography

15 END-USER

15.1 Market Snapshot & Growth Engine

15.2 Market Overview

15.2.1 Key Insights

15.3 Metal & Mining

15.3.1 Market Overview

15.3.2 Market Size & Forecast

15.3.3 Market by Geography

15.4 F&B

15.4.1 Market Overview

15.4.2 Market Size & Forecast

15.4.3 Market by Geography

15.5 Chemicals

15.5.1 Market Overview

15.5.2 Regional Outlook

15.5.3 Market Size & Forecast

15.5.4 Market by Geography

15.6 Oil & Gas

15.6.1 Market Overview

15.6.2 Challenges in Oil & Gas Industry

15.6.3 Market Size & Forecast

15.6.4 Market by Geography

15.7 Water & Wastewater

15.7.1 Market Overview

15.7.2 Market Size & Forecast

15.7.3 Market by Geography

15.8 Power Generation

15.8.1 Market Overview

15.8.2 Market Size & Forecast

- 15.8.3 Market by Geography
- 15.9 Packaging
 - 15.9.1 Market Overview
 - 15.9.2 Key Insights
 - 15.9.3 Market Size & Forecast
 - 15.9.4 Market by Geography
- 15.10 Textile
 - 15.10.1 Market Overview
 - 15.10.2 Key Insights
 - 15.10.3 Market Size & Forecast
 - 15.10.4 Market by Geography
- 15.11 Cement
 - 15.11.1 Market Overview
 - 15.11.2 Key Insights
 - 15.11.3 Market Size & Forecast
 - 15.11.4 Market by Geography
- 15.12 Paper & Pulp
 - 15.12.1 Market Overview
 - 15.12.2 Market Size & Forecast
 - 15.12.3 Market by Geography
- 15.13 Rubber & Plastic
 - 15.13.1 Market Overview
 - 15.13.2 Market Size & Forecast
 - 15.13.3 Market by Geography
- 15.14 Forestry & Woodworking
 - 15.14.1 Market Overview
 - 15.14.2 Market Size & Forecast
 - 15.14.3 Market by Geography
- 15.15 Other Industries
 - 15.15.1 Market Overview
 - 15.15.2 Market Size & Forecast
 - 15.15.3 Market by Geography

16 GEOGRAPHY

- 16.1 Market Snapshot & Growth Engine
- 16.2 Geographic Overview

17 APAC

17.1 Market Overview

17.1.1 Impact of COVID-19

17.2 Market Size & Forecast

17.3 Sales Channel

17.3.1 Market Size & Forecast

17.4 Product Type

17.4.1 Market Size & Forecast

17.5 Voltage

17.5.1 Market Size & Forecast

17.6 End-User

17.6.1 Market Size & Forecast

17.7 Key Countries

17.8 China: Market Size & Forecast

17.8.1 Highlights

17.8.2 Key Insights

17.9 Japan: Market Size & Forecast

17.9.1 Industrial Insights

17.10 India: Market Size & Forecast

17.10.1 Impact of COVID-19

17.10.2 Key Insights

17.11 South Korea: Market Size & Forecast

17.11.1 Highlights

17.12 Australia: Market Size & Forecast

17.12.1 Key Insights

18 EUROPE

18.1 Market Overview

18.1.1 Key Insights

18.1.2 Industry Performance

18.2 Market Size & Forecast

18.3 Sales Channel

18.3.1 Market Size & Forecast

18.4 Product Type

18.4.1 Market Size & Forecast

18.5 Voltage

18.5.1 Market Size & Forecast

18.6 End-User

- 18.6.1 Market Size & Forecast
- 18.7 Key Countries
- 18.8 Germany: Market Size & Forecast
 - 18.8.1 Impact of COVID-19
 - 18.8.2 Key Insights
- 18.9 Italy: Market Size & Forecast
 - 18.9.1 Industrial Insights
- 18.10 France: Market Size & Forecast
- 18.11 Spain: Market Size & Forecast
 - 18.11.1 Key Insights
- 18.12 UK: Market Size & Forecast
 - 18.12.1 Key Insights

19 NORTH AMERICA

- 19.1 Market Overview
 - 19.1.1 Industry Performance
- 19.2 Market Size & Forecast
- 19.3 Sales Channel
 - 19.3.1 Market Size & Forecast
- 19.4 Product Type
 - 19.4.1 Market Size & Forecast
- 19.5 Voltage
 - 19.5.1 Market Size & Forecast
- 19.6 End-User
 - 19.6.1 Market Size & Forecast
- 19.7 Key Countries
- 19.8 US: Market Size & Forecast
 - 19.8.1 Key Insights
- 19.9 Canada: Market Size & Forecast
 - 19.9.1 Key Insights

20 LATIN AMERICA

- 20.1 Market Overview
 - 20.1.1 Highlights
- 20.2 Market Size & Forecast
- 20.3 Sales Channel
 - 20.3.1 Market Size & Forecast

20.4 Product Type

20.4.1 Market Size & Forecast

20.5 Voltage

20.5.1 Market Size & Forecast

20.6 End-User

20.6.1 Market Size & Forecast

20.7 Key Countries

20.8 Mexico: Market Size & Forecast

20.8.1 Key Insights

20.9 Brazil: Market Size & Forecast

20.1 Chile: Market Size & Forecast

20.11 Rest Of Latin America: Market Size & Forecast

21 MIDDLE EAST & AFRICA

21.1 Market Overview

21.2 Market Size & Forecast

21.3 Sales Channel

21.3.1 Market Size & Forecast

21.4 Product Type

21.4.1 Market Size & Forecast

21.5 Voltage

21.5.1 Market Size & Forecast

21.6 End-User

21.6.1 Market Size & Forecast

21.7 Key Countries

21.8 Saudi Arabia: Market Size & Forecast

21.8.1 Key Insights

21.9 Turkey: Market Size & Forecast

21.1 Rest Of Middle East & Africa: Market Size & Forecast

22 COMPETITIVE LANDSCAPE

22.1 Competition Overview

23 KEY COMPANY PROFILES

23.1 ABB

23.1.1 Business Overview

- 23.1.2 Product Offerings
- 23.1.3 Key Strategies
- 23.1.4 Key Strengths
- 23.1.5 Key Opportunities
- 23.2 Danfoss
 - 23.2.1 Business Overview
 - 23.2.2 Product Offerings
 - 23.2.3 Key Strategies
 - 23.2.4 Key Strengths
 - 23.2.5 Key Opportunities
- 23.3 Emerson Electric
 - 23.3.1 Business Overview
 - 23.3.2 Product Offerings
 - 23.3.3 Key Strategies
 - 23.3.4 Key Strengths
 - 23.3.5 Key Opportunities
- 23.4 Fuji Electric
 - 23.4.1 Business Overview
 - 23.4.2 Product Offerings
 - 23.4.3 Key Strategies
 - 23.4.4 Key Strengths
 - 23.4.5 Key Opportunities
- 23.5 Mitsubishi Electric
 - 23.5.1 Business Overview
 - 23.5.2 Product Offerings
 - 23.5.3 Key Strategies
 - 23.5.4 Key Strengths
 - 23.5.5 Key Opportunities
- 23.6 Parker-Hannifin Corporation
 - 23.6.1 Business Overview
 - 23.6.2 Product Offerings
 - 23.6.3 Key Strategies
 - 23.6.4 Key Strengths
 - 23.6.5 Key Opportunities
- 23.7 Siemens
 - 23.7.1 Business Overview
 - 23.7.2 Product Offerings
 - 23.7.3 Key Strategies
 - 23.7.4 Key Strengths

- 23.7.5 Key Opportunities
- 23.8 Rockwell Automation
 - 23.8.1 Business Overview
 - 23.8.2 Product Offerings
 - 23.8.3 Key Strategies
 - 23.8.4 Key Strengths
 - 23.8.5 Key Opportunities
- 23.9 Schnieder Electric
 - 23.9.1 Business Overview
 - 23.9.2 Product Offerings
 - 23.9.3 Key Strategies
 - 23.9.4 Key Strengths
 - 23.9.5 Key Opportunities
- 23.10 WEG
 - 23.10.1 Product Offerings
 - 23.10.2 Key Strategies
 - 23.10.3 Key Strengths
 - 23.10.4 Key Opportunities
- 23.11 Nidec Corporation
 - 23.11.1 Business Overview
 - 23.11.2 Product Offerings
 - 23.11.3 Key Strategies
 - 23.11.4 Key Strengths
 - 23.11.5 Key Opportunities
- 23.12 Yaskawa Electric
 - 23.12.1 Business Overview
 - 23.12.2 Product Offerings
 - 23.12.3 Key Strategies
 - 23.12.4 Key Strengths
 - 23.12.5 Key Opportunities

24 OTHER PROMINENT VENDORS

- 24.1 Hiconics Drive Technology
 - 24.1.1 Business Overview
 - 24.1.2 Product Offerings
- 24.2 Inovance Technology
 - 24.2.1 Business Overview
 - 24.2.2 Product Offerings

24.3 KEB Automation

24.3.1 Business Overview

24.3.2 Product Offerings

24.4 Sew-Eurodrive

24.4.1 Business Overview

24.4.2 Product Offerings

24.5 Teco Westinghouse

24.5.1 Business Overview

24.5.2 Product Offerings

24.6 Toshiba International Corporation

24.6.1 Business Overview

24.6.2 Product Offerings

25 REPORT SUMMARY

25.1 Key Takeaways

25.2 Strategic Recommendations

26 GLOBAL MARKET: QUANTITATIVE SUMMARY

26.1 Market By Geography

26.1.1 Market Size & Forecast

26.2 Product Type

26.2.1 Market Size & Forecast

26.3 Voltage

26.3.1 Market Size & Forecast

26.4 Sales Channel

26.4.1 Market Size & Forecast

26.5 End-User

26.5.1 Market Size & Forecast

27 APAC: QUANTITATIVE SUMMARY

27.1 Voltage

27.1.1 Market Size & Forecast

27.2 Product Type

27.2.1 Market Size & Forecast

27.3 Sales Channel

27.3.1 Market Size & Forecast

27.4 End-Users

27.4.1 Market Size & Forecast

28 EUROPE: QUANTITATIVE SUMMARY

28.1 Voltage

28.1.1 Market Size & Forecast

28.2 Product Type

28.2.1 Market Size & Forecast

28.3 Sales Channel

28.3.1 Market Size & Forecast

28.4 End-Users

28.4.1 Market Size & Forecast

29 NORTH AMERICA: QUANTITATIVE SUMMARY

29.1 Voltage

29.1.1 Market Size & Forecast

29.2 Product Type

29.2.1 Market Size & Forecast

29.3 Sales Channel

29.3.1 Market Size & Forecast

29.4 End-Users

29.4.1 Market Size & Forecast

30 LATIN AMERICA: QUANTITATIVE SUMMARY

30.1 Voltage

30.1.1 Market Size & Forecast

30.2 Product Type

30.2.1 Market Size & Forecast

30.3 Sales Channel

30.3.1 Market Size & Forecast

30.4 End-Users

30.4.1 Market Size & Forecast

31 MIDDLE EAST & AFRICA

31.1 Voltage

- 31.1.1 Market Size & Forecast
- 31.2 Product Type
 - 31.2.1 Market Size & Forecast
- 31.3 Sales Channel
 - 31.3.1 Market Size & Forecast
- 31.4 End-Users
 - 31.4.1 Market Size & Forecast

32 APPENDIX

- 32.1 Abbreviations

List Of Tables

LIST OF TABLES

- Exhibit 1 Segmentation of Global Electric Drives Market
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Electric Drives: Energy Consumption Insights
- Exhibit 4 Electricity Consumption by Motors
- Exhibit 5 Risks Associated with heavy reliance on Supply Chain
- Exhibit 6 Impact of Future Potential for Integrated Motor Drive (IMD)
- Exhibit 7 Benefits Offered by IMDs
- Exhibit 8 Impact of Advent of IIoT in Electric Drives Market
- Exhibit 9 Benefits of IIoT in Electric Drives Market
- Exhibit 10 Impact of Significant Demand for AC Drives or VFD
- Exhibit 11 Advantages Associated with VFDs along with Low-Efficiency Motors
- Exhibit 12 Impact of Increasing Adoption of Automation
- Exhibit 13 Automation Dynamics
- Exhibit 14 Evolution of Automation
- Exhibit 15 Impact of Growing Demand for Renewable Energy
- Exhibit 16 Key Factors Supporting the Demand for Electric Drives by the Wind Power Generation Industry
- Exhibit 17 Impact of Unstable Demand from Oil & Gas Industry
- Exhibit 18 Global Oil Demand 2015-2020 (mb/d)
- Exhibit 19 Impact of Trade Conflicts between the US & China
- Exhibit 20 Major Focus of Vendors in the Electric Drives Market
- Exhibit 21 Key Entities in the Value Chain of Electric Drives Market
- Exhibit 22 Mega Trends Fueling Growth in the Electric Drives Market
- Exhibit 23 Market Share by Geography 2020 & 2026 (%)
- Exhibit 24 Market Share by Geography 2020 & 2026 (%)
- Exhibit 25 Global Electric Drives Market 2020–2026 (\$ billion)
- Exhibit 26 Five Forces Analysis 2020
- Exhibit 27 Incremental Growth by Product Type 2020 & 2026
- Exhibit 28 Factors Affecting the Demand for AC & DC Drives
- Exhibit 29 Key Features of AC Drives
- Exhibit 30 Growth Enablers in AC Drives Market
- Exhibit 31 Challenges in the Demand Growth
- Exhibit 32 Global AC Drives Market 2020–2026 (\$ billion)
- Exhibit 33 Key Factors Driving the Demand for DC Drives
- Exhibit 34 Challenges in the Demand Growth

- Exhibit 35 Global DC Drives Market 2020–2026 (\$ billion)
- Exhibit 36 Incremental Growth by Voltage 2020 & 2026
- Exhibit 37 Classification of Electric Drives Based on Voltage Type
- Exhibit 38 Major Applications of Low Voltage Electric Drives
- Exhibit 39 Factors Driving Demand for Low Voltage Electric Drives & Market Dynamics
- Exhibit 40 Global Low Voltage Electric Drives Market 2020–2026 (\$ billion)
- Exhibit 41 Major Applications of Medium Voltage Electric Drives
- Exhibit 42 Medium Voltage Drive Allocations across Various Applications (Volume)
- Exhibit 43 Factors Impacting the Demand for Medium Voltage Electric Drives
- Exhibit 44 Global Medium Voltage Electric Drives Market 2020–2026 (\$ billion)
- Exhibit 45 Incremental Growth by Sales Channel 2020 & 2026
- Exhibit 46 Global Electric drives market by Sales Channel Classification
- Exhibit 47 Direct Sales Outlook
- Exhibit 48 Global direct sales electric drives market 2020–2026 (\$ billion)
- Exhibit 49 Indirect Sales Outlook
- Exhibit 50 Global Indirect Sales Electric Drives Market 2020–2026 (\$ Billion)
- Exhibit 51 Incremental Growth by End-User 2020 & 2026
- Exhibit 52 End-Users Highlights
- Exhibit 53 Applications of Electric Drives in the Metals & Mining Industry
- Exhibit 54 Global Metals & Mining Market by Electric Drives 2020–2026 (\$ billion)
- Exhibit 55 Typical Applications of Electric Dives in the F&B Industry
- Exhibit 56 Factors Driving the Demand for Electric Drives from F&B Industry
- Exhibit 57 Global Electric Drives Market by F&B Industry 2020–2026 (\$ billion)
- Exhibit 58 Major Applications of Electric Drives in the Chemical Industry
- Exhibit 59 Global Pumps Market Growth Rate in the Chemical Industry by Region (CAGR)
- Exhibit 60 Regional Chemical Industry Outlook
- Exhibit 61 Global Electric Drives Market by Chemicals Industry 2020–2026 (\$ billion)
- Exhibit 62 Applications of Electric Drives in the Oil & Gas Industry
- Exhibit 63 Challenges for Vendors Supplying the Oil & Gas Industry
- Exhibit 64 Global Electric Drives Market by Oil & Gas Industry 2020–2026 (\$ billion)
- Exhibit 65 Global Electric Drives Market by Water & Wastewater Industry 2020–2026 (\$ billion)
- Exhibit 66 Global Electric Drives Market by Power Generation Industry 2020–2026 (\$ billion)
- Exhibit 67 Packaging Industry: key Insights
- Exhibit 68 Global Electric Drives Market by Packaging Industry 2020–2026 (\$ billion)
- Exhibit 69 Global Electric Drives Market by Textile Industry 2020–2026 (\$ billion)
- Exhibit 70 Applications of Electric Drives in the Cement Industry

- Exhibit 71 Cement Industry: Key Insights
- Exhibit 72 Cement Production & Consumption Outlook
- Exhibit 73 Global Electric Drives Market by Cement Industry 2020–2026 (\$ million)
- Exhibit 74 Global Electric Drives Market by Paper & Pulp Industry 2020–2026 (\$ billion)
- Exhibit 75 Key Benefits Offered by Electric Drives in the Rubber & Plastics Industry
- Exhibit 76 Global Electric Drives Market by Rubber & Plastic Industry 2020–2026 (\$ billion)
- Exhibit 77 Forestry & Woodworking Industry Insights
- Exhibit 78 Global Electric Drives Market by Forestry & Woodworking Industry 2020–2026 (\$ billion)
- Exhibit 79 Global Electric Drives Market by Other Industries 2020–2026 (\$ billion)
- Exhibit 80 Incremental Growth by Geography 2020 & 2026
- Exhibit 81 Electric Drives Market Dynamics by Geography
- Exhibit 82 Steel Output 2010-2019 (million tonnes)
- Exhibit 83 Share of World Crude Steel Production (2019)
- Exhibit 84 Electric Drives Market in APAC 2020–2026 (\$ billion)
- Exhibit 85 Incremental Growth in North America 2020 & 2026
- Exhibit 86 Electric Drives Market in China 2020–2026 (\$ million)
- Exhibit 87 Electric Drives Demand in China: Key Insights
- Exhibit 88 Number of Establishments for Major End-Users in Japan (2020)
- Exhibit 89 Electric Drives Market in Japan 2020–2026 (\$ billion)
- Exhibit 90 Top Energy Intensive Industries in India
- Exhibit 91 Impact of COVID-19 on Industrial Sector of India
- Exhibit 92 Major Challenges Faced by Industries in India
- Exhibit 93 Electric Drives Market in India 2020–2026 (\$ billion)
- Exhibit 94 Key Insights
- Exhibit 95 South Korea Industry Performance
- Exhibit 96 Electric Drives Market in South Korea 2020–2026 (\$ billion)
- Exhibit 97 Electric Drives Market in Australia 2020–2026 (\$ billion)
- Exhibit 98 Top Industries Boosting Demand for Electric Drives in Europe
- Exhibit 99 Electric Drives Market in Europe 2020–2026 (\$ billion)
- Exhibit 100 Incremental Growth in Europe 2020 & 2026
- Exhibit 101 Value Added by Manufacturing Industry of Germany (% of GDP)
- Exhibit 102 Impact of COVID-19 on Industrial Performance of Germany
- Exhibit 103 Electric Drives Market in Germany 2020–2026 (\$ billion)
- Exhibit 104 Key Insights
- Exhibit 105 Electric Drives Market in Italy 2020–2026 (\$ billion)
- Exhibit 106 Electric Drives Market in France 2020–2026 (\$ billion)
- Exhibit 107 Manufacturing Production Spain (2020)

Exhibit 108 Industry Insights of France
Exhibit 109 Electric Drives Market in Spain 2020–2026 (\$ billion)
Exhibit 110 Electric Drives Market in the UK 2020–2026 (\$ billion)
Exhibit 111 Electric Drives Market in North America 2020–2026 (\$ billion)
Exhibit 112 Incremental Growth in North America 2020 & 2026
Exhibit 113 Top Energy Consuming Sectors Driving Demand for Electric Drives in the US
Exhibit 114 Electric Drives Market in the US 2020–2026 (\$ million)
Exhibit 115 Electric Drives Market in Canada 2020–2026 (\$ million)
Exhibit 116 Latin America: Highlights
Exhibit 117 Electric Drives Market in Latin America 2020–2026 (\$ billion)
Exhibit 118 Incremental Growth in Latin America 2020 & 2026
Exhibit 119 Electric Drives Market in Mexico 2020–2026 (\$ million)
Exhibit 120 Electric Drives Market in Brazil 2020–2026 (\$ million)
Exhibit 121 Electric Drives Market in Chile 2020–2026 (\$ million)
Exhibit 122 Electric Drives Market in the Rest of Latin America 2020–2026 (\$ million)
Exhibit 123 Electric drives Market in the Middle East & Africa 2020–2026 (\$ million)
Exhibit 124 Incremental Growth in the Middle East & Africa 2020 & 2026
Exhibit 125 Saudi Arabia: Key Insights
Exhibit 126 Electric Drives Market in Saudi Arabia 2020–2026 (\$ million)
Exhibit 127 Manufacturing Production Insights: Turkey
Exhibit 128 Electric Drives Market in Turkey 2020–2026 (\$ million)
Exhibit 129 Electric Drives Market in the Rest of Middle East & Africa 2020–2026 (\$ million)
Exhibit 130 Factors Influencing Competitive Position
Exhibit 131 Factors Influencing M&A Strategies
Exhibit 132 Competitive Outlook

LIST OF TABLES

Table 1 Key Caveats
Table 2 Currency Conversion 2013?2020
Table 3 AC Drives Market by Geography 2020?2026 (\$ billion)
Table 4 DC Drives Market by Geography 2020?2026 (\$ billion)
Table 5 Low Voltage Electric Drives by Geography 2020?2026 (\$ billion)
Table 6 Medium Voltage Electric Drives by Geography 2020?2026 (\$ billion)
Table 7 Direct Sales by Geography 2020?2026 (\$ billion)
Table 8 Indirect Sales by Geography 2020?2026 (\$ billion)

Table 9 Electric Drives Market by Metal & Mining Industry: Market by Geography 2020?2026 (\$ million)

Table 10 Electric Drives Market by F&B Industry: Market by Geography 2020?2026 (\$ million)

Table 11 Electric Drives Market by Chemicals Industry: Market by Geography 2020?2026 (\$ million)

Table 12 Electric Drives Market by Oil & Gas Industry: Market by Geography 2020?2026 (\$ million)

Table 13 Water & Wastewater Electric Drives Market by Geography 2020?2026 (\$ million)

Table 14 Electric Drives Market by Power Generation Industry: Market by Geography 2020?2026 (\$ million)

Table 15 Electric Drives Market by Packaging Industry: Market by Geography 2020?2026 (\$ million)

Table 16 Electric drives Market by Textile Industry: Market by Geography 2020?2026 (\$ million)

Table 17 Electric Drives Market by Cement Industry: Market by Geography 2020?2026 (\$ million)

Table 18 Electric Drives Market by Paper & Pulp Industry: Market by Geography 2020?2026 (\$ million)

Table 19 Electric Drives Market by Rubber & Plastic Industry: Market by Geography 2020?2026 (\$ million)

Table 20 Electric drives Market by Forestry And Woodworking Industry: Market by Geography 2020?2026 (\$ million)

Table 21 Electric Drives Market by Other Industries: Market by Geography 2020?2026 (\$ million)

Table 22 Electric Drives Market in APAC by Sales Channel 2020?2026 (\$ billion)

Table 23 Electric Drives Market in APAC by Product Type 2020?2026 (\$ billion)

Table 24 Electric Drives Market in APAC by Voltage 2020?2026 (\$ billion)

Table 25 Electric Drives Market in APAC by End-User 2020?2026 (\$ million)

Table 26 Electric Drives Market in Europe by Sales Channel 2020?2026 (\$ million)

Table 27 Electric Drives Market in Europe by Product Type 2020?2026 (\$ billion)

Table 28 Electric Drives Market in Europe by Voltage 2020?2026 (\$ billion)

Table 29 Electric Drives Market in Europe by End-User 2020?2026 (\$ million)

Table 30 Electric Drives Market in North America by Sales Channel 2020?2026 (\$ million)

Table 31 Electric Drives Market in North America by Product Type 2020?2026 (\$ million)

Table 32 Electric Drives Market in North America by Voltage 2020?2026 (\$ million)

Table 33 Electric Drives Market in North America by End-User 2020?2026 (\$ million)

Table 34 Electric Drives Market in Latin America by Sales Channel 2020?2026 (\$ million)

Table 35 Electric Drives Market in Latin America by Product Type 2020?2026 (\$ million)

Table 36 Electric Drives Market in Latin America by Voltage 2020?2026 (\$ million)

Table 37 Electric Drives Market in Latin America by End-User 2020?2026 (\$ million)

Table 38 Electric drives Market in the Middle East & Africa by Sales Channel 2020?2026 (\$ million)

Table 39 Electric Drives Market in the Middle East & Africa by Product Type 2020?2026 (\$ million)

Table 40 Electric Drives Market in the Middle East & Africa by Voltage 2020?2026 (\$ million)

Table 41 Electric Drives Market in the Middle East & Africa by End-User 2020?2026 (\$ million)

Table 42 ABB: Major Product Offerings

Table 43 Danfoss: Major Product Offerings

Table 44 Emerson Electric: Major Product Offerings

Table 45 Fuji Electric: Major Product Offerings

Table 46 Mitsubishi Electric: Major Product Offerings

Table 47 Parker-Hannifin Corporation: Major Product Offerings

Table 48 Siemens: Major Product Offerings

Table 49 Rockwell Automation: Major Product Offerings

Table 50 Schneider Electric: Major Product Offerings

Table 51 WEG: Major Product Offerings

Table 52 Nidec Corporation: Major Product Offerings

Table 53 Yaskawa Electric: Major Product Offerings

Table 54 Hiconics Drive Technology: Major Product Offerings

Table 55 Inovance Technology: Major Product Offerings

Table 56 KEB Automation: Major Product Offerings

Table 57 Sew-Eurodrive India: Major Product Offerings

Table 58 Teco Westinghouse: Major Product Offerings

Table 59 Toshiba International Corporation: Major Product Offerings

Table 60 Global Electric Drives Market by Geography 2020?2026 (\$ billion)

Table 61 Global Electric Drives Market by Geography 2020?2026 (% Share)

Table 62 Global Electric Drives Market by Product Type 2020?2026 (\$ billion)

Table 63 Global Electric Drives Market by Product Type 2020?2026 (% Share)

Table 64 Global Electric Drives Market by Voltage 2020?2026 (\$ billion)

Table 65 Global Electric Drives Market by Voltage 2020?2026 (% Share)

Table 66 Global Electric Drives Market by Sales Channel 2020?2026 (\$ billion)

Table 67 Global Electric Drives Market by Sales Channel 2020?2026 (% Share)
Table 68 Global Electric Drives Market by End-User 2020?2026 (\$ billion)
Table 69 Global Electric Drives Market by End-User 2020?2026 (% Share)
Table 70 Electric Drives Market by Voltage in APAC 2020?2026 (\$ billion)
Table 71 Electric Drives Market by Voltage in APAC 2020?2026 (% Share)
Table 72 Electric Drives Market by Product Type in APAC 2020?2026 (\$ billion)
Table 73 Electric Drives Market by Product Type in APAC 2020?2026 (% Share)
Table 74 Electric Drives Market by Sales Channel in APAC 2020?2026 (\$ billion)
Table 75 Electric Drives Market by Sales Channel in APAC 2020?2026 (% Share)
Table 76 Electric Drives Market by End-User in APAC 2020?2026 (\$ million)
Table 77 Electric Drives Market by End-User in APAC 2020?2026 (% Share)
Table 78 Electric Drives Market by Voltage in Europe 2020?2026 (\$ billion)
Table 79 Electric Drives Market by Voltage in Europe 2020?2026 (% Share)
Table 80 Electric Drives Market by Product Type in Europe 2020?2026 (\$ billion)
Table 81 Electric Drives Market by Product Type in Europe 2020?2026 (% Share)
Table 82 Electric Drives Market by Sales Channel in Europe 2020?2026 (\$ million)
Table 83 Electric Drives Market by Sales Channel in Europe 2020?2026 (% Share)
Table 84 Electric Drives Market by End-User in Europe 2020?2026 (\$ million)
Table 85 Electric Drives Market by End-User in Europe 2020?2026 (% Share)
Table 86 Electric Drives Market by Voltage in North America 2020?2026 (\$ million)
Table 87 Electric Drives Market by Voltage in North America 2020?2026 (% Share)
Table 88 Electric Drives Market by Product Type in North America 2020?2026 (\$ million)
Table 89 Electric Drives Market by Product Type in North America 2020?2026 (% Share)
Table 90 Electric Drives Market by Sales Channel in North America 2020?2026 (\$ million)
Table 91 Electric Drives Market by Sales Channel in North America 2020?2026 (% Share)
Table 92 Electric Drives Market by End-User in North America 2020?2026 (\$ million)
Table 93 Electric Drives Market by End-User in North America 2020?2026 (% Share)
Table 94 Electric Drives Market by Voltage in Latin America 2020?2026 (\$ million)
Table 95 Electric Drives Market by Voltage in Latin America 2020?2026 (% Share)
Table 96 Electric Drives Market by Product Type in Latin America 2020?2026 (\$ million)
Table 97 Electric Drives Market by Product Type in Latin America 2020?2026 (% Share)
Table 98 Electric Drives Market by Sales Channel in Latin America 2020?2026 (\$ million)
Table 99 Electric Drives Market by Sales Channel in Latin America 2020?2026 (% Share)

Table 100 Electric Drives Market by End-User in Latin America 2020?2026 (\$ million)

Table 101 Electric Drives Market by End-User in Latin America 2020?2026 (% Share)

Table 102 Electric Drives Market by Voltage in Middle East & Africa 2020?2026 (\$ million)

Table 103 Electric Drives Market by Voltage in Middle East & Africa 2020?2026 (% Share)

Table 104 Electric Drives Market by Product Type in Middle East & Africa 2020?2026 (\$ million)

Table 105 Electric Drives Market by Product Type in Middle East & Africa 2020?2026 (% Share)

Table 106 Electric Drives Market by Sales Channel in Middle East & Africa 2020?2026 (\$ million)

Table 107 Electric Drives Market by Sales Channel in Middle East & Africa 2020?2026 (% Share)

Table 108 Electric Drives Market by End-User in Middle East & Africa 2020?2026 (\$ million)

Table 109 Electric Drives Market by End-User in Middle East & Africa 2020?2026 (% Share)

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