

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?

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