

Industrial Motors 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 Industrial Motors Market Report

The industrial motors market by revenue is expected to grow at a CAGR of over 8% during the period 2021–2026.

The global industrial motors industry is expected to grow with the growth in industrial production, enhancement in technological advancement, increase in urbanization, and expansion of manufacturing industries. The industrial motor sales in the APAC region are anticipated to experience steady growth, and key drivers include an increase in infrastructure expenditure and a focus on industrial production growth. Several APAC countries, including China and India, are expected to observe remarkable gains in the industrial motors market with key infrastructure expansions in the industrial sector and building services during the forecast period.

The following factors are likely to contribute to the growth of the industrial motors market during the forecast period:

Increase in Infrastructure Development Projects in the Middle East

Demand for IE4 Efficiency, Low-voltage Motors

Growth in Usage of VFD in IE2/IE3 AC LV Motors

The study considers the present scenario of the industrial motors 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 Industrial Motors Market Segmentation

The global industrial motors market research report includes a detailed segmentation by product, voltage, efficiency, end-user, sales channel, power output, geography. The increasing automation in industrial processes and the use of electric AC motors in diverse applications such as healthcare, construction, automotive, and consumer goods industries are expected to drive the AC motors market. The growing application use of electric AC motors in infrastructural development, and rising construction activities in developing economies are other major factors accelerating the market growth.

IE2 low-voltage motors are anticipated to grow during the forecast period as several customers have replaced IE1 with IE2 ones. Changes in government energy-efficiency regulations are influencing growth across the world. However, the growth of the IE2 motors market is likely to be affected due to the adoption of efficient IE3 and IE4 motors. The IE1 motors market growth is expected to remain stable during the forecast period as several new and high-efficiency motors are likely to grow in the industry. With the industrial sector growing, IE1 motors are expected to increase. APAC, North America, and Latin American countries are likely to drive the segment, albeit slowly.

Low-voltage industrial motors are expected to grow substantially during the forecast period. The growth in the manufacturing sector worldwide and the application of several technological products such as smart sensors are likely to increase the demand. Low-voltage motors are characterized by high reliability, ruggedness, and efficiency, hence their adoption in industrial or commercial environments, building management systems, shipbuilding, and infrastructure is high.

The increasing global understanding of energy conservation fuels the demand for integral horsepower units as they are extremely energy efficient motors. Factories are using these motors to reduce electrical and operational costs. The market is expected to observe growth during the forecast period due to continued industrialization in emerging economies such as India and China. However, an initial installation cost is significantly hindering the growth of the segment.

The demand for HVAC for integrated cooling and ventilation is growing as the number

of buildings with glass walls is increasing the need for a highly efficient indoor climate. The requirement for HVAC is expected to surge, albeit at a slower rate, on account of the COVID-19-related economic slowdown. Regulations on energy consumption and climate change control are evolving. However, short time-to-market and narrow acceptance of new technology add to the market challenges for HVAC vendors.

Direct sales account for the highest revenue share of the industrial motors market. These channels allow the consumer to buy goods directly from manufacturers. As there are no third-party intermediaries, customers prefer to purchase via these channels. Direct channels have highly effective in eliminating inefficiencies, adding new offerings, and setting rates. However, for manufacturers, direct channels tend to be costlier as they require substantial capital investment. Indirect sales channels are third-party purchases via distributors or dealers. Indirect networks free the manufacturer from any start-up expenses (related to distribution). The segment is expected to grow due to the availability of a wide distribution network and profound market knowledge and demand insights through distributors.

Product

AC

DC

Voltage

Low

Medium

High

Efficiency

IE1

IE2

IE3

IE4

End-user

HVAC

F&B

Power Generation

Mining

Machine Tools

Elevators and Escalators

Warehousing

Paper & Paperboard

Oil & Gas

Metal Processing

Pharmaceutical

Chemical

Packaging

Others

Power Output

Integral Horsepower

Fractional Horsepower

Sales Channel

Direct to End-user

Direct to OEM

Direct to System Integrator

Distributor to End-user

Distributor to OEM

Distributor to System Integrator

INSIGHTS BY GEOGRAPHY

Pegged as a manufacturing and industrial hub of the world, the APAC industrial motors market is expected to reach over \$29 billion by 2026. The demand for industrial motors in the region can be attributed to rapidly increasing urbanization and industrialization. The presence of several developed countries, which are witnessing high demand for industrial motors in several end-user applications, is expected to drive the growth of the region during the forecast period. Being a global manufacturing center, with access to low labor cost, highly skilled workers, an abundance of raw materials, China accounts for the highest share in the industrial motors market in the region as well as across the globe. However, with the outbreak of the COVID-19 pandemic and the increasing trade concerns with the US, the manufacturing industry in China is currently going through a decline for a short-term period.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

India

Japan

South Korea

Australia

Latin America

Mexico

Brazil

Chile

Argentina

Middle East & Africa

Saudi Arabia

Turkey

Rest of Middle East & Africa

INSIGHTS BY VENDORS

The competitive scenario in the global industrial motors market is currently intensifying. The entry of large motor companies in the market poses a significant threat to domestic vendors. Large companies such as ABB, Siemens, Eaton, Johnson Electric, and Mitsubishi are set to explore the market worldwide. All these companies have a global presence in three major geographical regions - North America, APAC, and Europe. However, there are local vendors providing products with similar specifications at low prices. This has intensified price wars among the key players.

Prominent Vendors

ABB

Allied Motion Technologies

CG Power and Industrial Solutions

Eaton

Johnson Electric

Nidec

Regal Beloit Corporation

Siemens

WEG

Other Prominent Vendors

ARC Systems

Ametek

Bonfiglioli

Brook Crompton

Dana Brevini Power Transmission

Fuji Electric

Maxon

Rockwell Automation

Sew- Eurodrive

TECO-Westinghouse

KEY QUESTIONS ANSWERED

1. What is the value of the global industrial motors market during 2021–2026?
2. What are the key growth strategies of industrial motors market players?
3. What is the growth of Europe's industrial motors market, and which countries are likely to emerge as major revenue contributors?
4. Which government regulations are likely to challenge the growth of key regional markets?
5. Which region could observe the maturity in demand in near future?
6. What opportunities the market offer for new players?

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