

Robotic Smart Motors Market - A Global and Regional Analysis: Focus on Robot Type, Voltage, Component, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Introduction to the Global Robotic Smart Motors Market

The global robotic smart motors market has experienced remarkable growth in recent years due to substantial growth and technological advancements. One of the primary driving forces behind the market's expansion is the burgeoning demand for automation across diverse sectors. From automotive manufacturing and healthcare to logistics and even in people's daily lives, smart motors are playing a pivotal role. With the advancements in artificial intelligence (AI) and machine learning (ML), robotic systems equipped with smart motors can continuously improve their performance. These motors learn about their physical surroundings, including obstacles, objects, and their locations from their environment, make real-time decisions, and even collaborate with humans seamlessly, making themselves versatile and invaluable assets across industries.

Furthermore, these motors are energy-efficient, contributing to sustainability efforts by reducing power consumption. This aspect aligns with the growing focus on adopting eco-friendly practices and energy conservation, further driving market growth. Moreover, the global robotic smart motors market represents the future of automation. With their capacity for precision, adaptability, and energy efficiency, these motors are poised to become the cornerstone of countless industries, shaping a world where automation is not just a luxury but a necessity for efficiency, quality, and sustainability.

Market Introduction

In recent years, there has been a significant surge in growth and innovation within the global market for robotic smart motors. This surge can be attributed to the increasing

demand for automation across various industries, including manufacturing, healthcare, and logistics. Smart motors, equipped with advanced sensors and control systems, offer enhanced precision, efficiency, and flexibility in robotic applications. Additionally, advancements in artificial intelligence and machine learning have further bolstered the capabilities of smart motors, enabling robots to adapt and learn from their surroundings. As industries continue to embrace automation, the global robotic smart motors market is expected to continue its upward trajectory, revolutionizing the way one works and lives.

Industrial Impact

The global adoption of robotic smart motors is significantly reshaping industries worldwide. These advanced motors, equipped with sophisticated sensors, controllers, and AI capabilities, are revolutionizing manufacturing industries by enhancing productivity and product quality. These robotic smart motors work alongside human workers, augmenting their capabilities and leading to safer and more efficient processes. Industries such as logistics and healthcare are experiencing optimization and improved services such as precise inventory management and minimally invasive surgeries. Moreover, the energy efficiency of these motors contributes to sustainability efforts while providing a competitive advantage to early adopters. The industrial impact is undeniable, promising increased efficiency, quality, and competitiveness across diverse sectors.

Market Segmentation:

Segmentation 1: by Robot Type

Commercial

- o Industrial Robot

- o Service Robot

- o Medical Robot

- o Agricultural Robot

- o Inspection and Maintenance Robot

- o Cleaning Robot

- o Warehouse and Logistics Robot

Defense

- o Unmanned Aerial Vehicle (UAV)

- o Unmanned Ground Vehicle (UGV)

- o Unmanned Maritime Vehicle (UMV)

- o Bomb Disposal Robot

- o Tactical Robot

- o Robotic Exoskeleton

- o Autonomous Weapon System

Commercial Segment to Lead the Global Robotic Smart Motors Market (by Robot Type)

The global robotic smart motors market was led by commercial application, which is expected to grow at a CAGR of 5.48% during the forecast period 2023-2033. This growth is driven by a convergence of factors, including the escalating demand for automation across various commercial sectors, the versatility and efficiency offered by robotic smart motors, and the continuous advancement of artificial intelligence and machine learning technologies. These factors collectively drive the market's growth, enabling businesses to enhance productivity, quality, and competitiveness through the adoption of these innovative technologies.

Segmentation 2: by Voltage

- 12V

- 18V

- 24V

36V

48V

Above 48V

24V Segment to Dominate the Global Robotic Smart Motors Market (by Voltage)

The global robotic smart motors market is expected to be dominated by the 24V voltage in 2023. The 24V is expected to grow at a CAGR of 5.34% during the forecast period 2023-2033. One of the primary reasons behind this growth is the widespread adoption of 24V motors across various industries and applications. Their voltage rating aligns well with the power requirements of many automated systems and devices, making them versatile and compatible with a broad range of equipment. Additionally, 24V motors offer a balance between efficiency and power, making themselves suitable for tasks that require both precision and strength.

Segmentation 3: by Component

Hardware

Software

Hardware Segment to Lead Global Robotic Smart Motors Market (by Component)

The global robotic smart motors market (by component) includes hardware, which is expected to dominate the market. It is expected to generate \$3.40 billion in 2023 and is projected to reach \$5.63 billion by 2033, registering a CAGR of 5.18% during the forecast period 2023-2033.

Segmentation 4: by Region

North America - U.S. and Canada

Europe - U.K., France, Germany, Russia, and Rest-of-Europe

Asia-Pacific - China, India, Japan, and Rest-of-Asia-Pacific

Rest-of-the-World - Latin America and Middle East and Africa

North America to Dominate Global Robotic Smart Motors Market (by Region)

North America is anticipated to grow at a CAGR of 5.16%. The presence of a larger number of established robotic smart motors providers is driving the market in the region. The presence of major industry players such as YASKAWA ELECTRIC CORPORATION, Kollmorgen, Parker Hannifin Corporation, Moog Animatics, and AMKmotion GmbH within the region, along with growth strategies such as partnerships, are paving the way for market opportunities.

The U.S. is one of the significant countries with various key players manufacturing robotic smart motors. Several companies have developed innovative smart motors to revolutionize the industrial automation landscape with expanded performance and integration capabilities. For instance, in April 2022, Moog Animatics introduced the latest addition to its product lineup, the Class 6 D-Style Smart Motor series. These novel models further amplify the capabilities of the already highly adaptable smart motor servo system, seamlessly incorporating a motor and battery-less multiturn absolute encoder, amplifier, and controller.

Recent Developments in the Global Robotic Smart Motors Market

In June 2023, Goldfuss Engineering achieved a groundbreaking advancement in automation by successfully utilizing YASKAWA robots for pioneering development. Addressing a previous challenge of handling sensitive vials in bulk, Goldfuss Engineering introduced a novel solution. This solution involves employing a specialized gripper alongside a YASKAWA robot, eliminating the historical hurdles associated with automating the handling of small cylindrical medicine bottles commonly enclosed in Akylux boxes.

In June 2023, SoftBank Corporation declared a collaborative achievement with NIDEC CORPORATION in designing an axial flux-type motor for high-altitude platform stations (HAPS), distinguished by its lightweight, high efficiency, and exceptional reliability. This motor aligns perfectly with the prerequisites for SunGlider, an unmanned aircraft system (UAS) innovated by HAPSMobile Inc. The motor developed through this collaboration showcases attributes of being lightweight, highly efficient, and delivering exceptional performance. Moreover, its effective thermal dissipation capabilities ensure consistent

and stable operation within the challenging hypobaric conditions of the stratosphere.

In June 2023, NIDEC CORPORATION and Embraer announced a strategic partnership, leading to the establishment of a new entity named NIDEC Aerospace LLC. This venture is dedicated to developing electric propulsion systems tailored for the aerospace sector. This collaboration aims to pioneer a fresh era in air mobility by harnessing the combined expertise of two renowned engineering giants.

In May 2023, YASKAWA ELECTRIC CORPORATION collaborated with Oishii Farm Corporation. The primary objective of this partnership was to establish a global leadership position in agricultural and food automation. This can be achieved by furnishing Oishii's plant factories with cutting-edge automation systems based on YASKAWA's "i?- Mechatronics" solution framework. The ultimate goal was to achieve a sustainable society, primarily by ensuring a consistent food supply.

Demand – Drivers, Limitations, and Opportunities

Market Drivers: Growing Utilization of Automation in Industries

The rising demand for automation is evident across various industries, including manufacturing, oil and gas, chemicals, and pharmaceuticals. This surge is primarily driven by the imperative to enhance productivity, safety standards, and overall product quality. Prominent participants in the industrial automation market include ABB, Siemens, Rockwell Automation, Honeywell International, and Schneider Electric. These industry leaders are dedicated to crafting pioneering products and solutions in response to the increasing automation needs across diverse sectors.

Market Challenges: Cyberattacks on Robotic and Autonomous Systems

Sensors and communication capabilities integrated into smart motors can gather a wealth of operational data, including performance metrics, usage patterns, and system health information. While this data is invaluable for optimizing operations and predictive maintenance, it also becomes a potential target for cyber threats. The stakes are high, as compromised data can lead to operational disruptions, intellectual property theft, and breaches of sensitive customer information. To safeguard against these risks, businesses must implement robust cybersecurity measures tailored to the unique characteristics of smart motor systems.

Market Opportunities: Integration of Smart Robots with Other Emerging Technologies

The integration of smart robots with cutting-edge technologies such as 5G networks and edge computing is catalyzing a transformative shift in various industries. By harnessing the power of these innovations, organizations are achieving remarkable advancements in operational efficiency and intelligence. The ultrafast, low-latency connectivity of 5G networks empowers smart robots to communicate and process data in real time. Robots can make split-second decisions, collaborate, and interact with humans more seamlessly. In sectors such as manufacturing and logistics, all of these factors translate to optimized production processes, reduced downtime, and enhanced supply chain management.

How can this report add value to an organization?

Growth/Marketing Strategy: The global robotic smart motors market has seen major development, such as contracts, collaborations, and joint ventures by key players operating in the market. The favored strategy for the companies has been contracts to strengthen their position in the global robotic smart motors market. For instance, in May 2023, Rockwell Automation entered a strategic partnership with Autonox Robotics GmbH. This collaboration aims to empower companies across North America, Europe, and the Middle East and Africa with innovative manufacturing opportunities by integrating unified robot control solutions. By joining forces, the two companies seek to revolutionize industrial automation and enable customers in these regions to unlock new possibilities in their manufacturing processes.

Competitive Strategy: Key players in the global robotic smart motors market analyzed and profiled in the study involve major global robotic smart motors companies providing components such as motor controllers, sensors, communication interfaces, and more. Moreover, a detailed market share analysis of the players operating in the global robotic smart motors market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been done to ensure maximum coverage of manufacturers/suppliers that are operational in a country.

Exact revenue information, up to a certain extent, has been extracted for each company from secondary sources and databases. Revenues specific to product/service/technology were then estimated for each market player based on fact-based proxy indicators as well as primary inputs.

Based on the classification, the average selling price (ASP) has been calculated using the weighted average method.

The currency conversion rate has been taken from the historical exchange rate of Oanda and/or other relevant websites.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The term “product” in this document may refer to “service” or “technology” as and where relevant.

The term “manufacturers/suppliers” may refer to “service providers” or “technology providers” as and where relevant.

Primary Research

The primary sources involve industry experts from the defense industry, including smart motor manufacturers and robot manufacturers. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research

study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as Bloomberg, Factiva, Businessweek, and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market.

Secondary research was done to obtain critical information about the industry's value chain, the market's monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights gathered from primary experts.

The top established robotic smart motors providers hold around 79% of the presence in the market. The start-ups in the market hold around 21% as of 2022 of the global robotic smart motors market.

Key Companies Profiled:

ABB

Siemens

NIDEC CORPORATION

YASKAWA ELECTRIC CORPORATION

Moog Animatics

Rockwell Automation

Schneider Electric

Dunkermotoren GmbH

Nanotec Electronic GmbH & Co KG

Lenze

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