

Global Variable Frequency Drive Motors Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Variable Frequency Drive Motors market size is expected to reach \$ 19180 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Variable Frequency Drive Motors are industrial AC motors specifically designed, insulation-reinforced or system-validated for pulse-width-modulated inverter power and operation across a broad frequency range. The motors achieve continuous speed regulation, constant-torque operation or constant-power operation by varying supply frequency and voltage. The core scope includes inverter-duty squirrel-cage induction motors, permanent magnet synchronous motors and synchronous reluctance motors, with optional forced ventilation, insulated bearings, shaft-grounding rings and encoder feedback. The scope excludes standalone variable frequency drives, servo motors, traction motors, appliance-integrated motors and general-purpose motors without explicit variable-frequency compatibility. ABB, WEG, Innomotics and Nidec have established dedicated VFD-compatible or inverter-duty product portfolios.

The upstream industry comprises electrical steel, copper winding wire, aluminum or cast-iron housings, insulation systems, bearings, permanent magnets, encoders and cooling components. Midstream activities include electromagnetic design, casting, stamping, winding, vacuum-pressure impregnation, assembly, testing and motor-drive matching. Downstream pump, fan, compressor and conveyor OEMs and EPC contractors integrate these motors into HVAC, water treatment, oil and gas, chemicals, mining, metals and general manufacturing systems. The product occupies the electromechanical energy-conversion stage of the industrial drive chain. Standard low-voltage induction motors rely on scale and supply-chain efficiency for profitability, while medium- and high-voltage, explosion-protected, permanent-magnet, synchronous-

reluctance and packaged motor-drive solutions command higher value because of certification and application-engineering barriers.

Global shipments of Variable Frequency Drive Motors were approximately 27 million units in 2025, with an average price of approximately US\$475 per unit and a manufacturing gross margin of approximately 20%-30%.

In China, Variable Frequency Drive Motors key players include DAEYANG, Wolong, Jiangxi Special Electric Motor Co., Ltd., Jiamusi Electric Machine Co. Ltd., etc. Global top four manufacturers hold a share over 10%. In terms of application, the largest application is Equipment, with a share over 50%, followed by Home Appliance, etc.

Variable Frequency Drive Motors Enter A New Cycle Of Efficiency And System-Level Growth

Industrial energy-efficiency requirements are transforming Variable Frequency Drive Motors from optional components into mainstream industrial infrastructure. Electric motor systems accounted for approximately 53% of global electricity consumption in 2023 and approximately 72% of industrial electricity consumption, yet only about one-quarter of industrial motors currently use drives. Matching the speed of pumps, fans and compressors to actual load through variable-speed operation can typically reduce electricity consumption by approximately 25%, with high-efficiency motor-drive investments commonly achieving payback within one to three years. Tightening efficiency regulation, volatile energy prices and corporate decarbonization targets are therefore creating a replacement market alongside demand from new industrial capacity.

Value creation is shifting from conventional copper, electrical steel and standardized housings toward insulation systems, low-speed thermal management, bearing-current protection, encoder feedback, drive-parameter matching and lifecycle services. Low-voltage squirrel-cage induction motors will remain the largest category by unit volume, but IE4-and-above permanent-magnet and synchronous-reluctance motors, medium- and high-voltage VFD motors, explosion-protected motors and integrated motor-drive packages will contribute a disproportionate share of revenue growth. ABB, WEG, Innomotics, Nidec, Wolong, Wannan Motor, Jiangsu Dazhong and XEMC already offer commercially available product families. Equipment OEMs are also increasingly selecting jointly tested motor-drive packages to reduce commissioning time, compatibility risk and unplanned downtime.

Key risks include raw-material volatility, price competition in standardized products and

the reliability implications of inverter operation. Copper, electrical steel and rare-earth magnet prices directly affect manufacturing costs, while pulse-width-modulated voltage can increase winding-insulation stress, shaft voltage and bearing-current damage. Motor cooling may also deteriorate at low speeds when shaft-mounted fans are used. Medium-voltage and explosion-protected projects face additional challenges from long certification cycles, project-based demand, complex commissioning and extensive after-sales obligations. Long-term winners will therefore be suppliers capable of integrating electromagnetic design, insulation and thermal engineering, drive parameters, condition monitoring and service networks into a demonstrable lifecycle value proposition rather than merely supplying the lowest-priced motor.

This report studies the global Variable Frequency Drive Motors production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Variable Frequency Drive Motors and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Variable Frequency Drive Motors that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Variable Frequency Drive Motors total production and demand, 2021-2032, (K Units)

Global Variable Frequency Drive Motors total production value, 2021-2032, (USD Million)

Global Variable Frequency Drive Motors production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Variable Frequency Drive Motors consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Variable Frequency Drive Motors domestic production, consumption, key domestic manufacturers and share

Global Variable Frequency Drive Motors production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Variable Frequency Drive Motors production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Variable Frequency Drive Motors production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Variable Frequency Drive Motors market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ABB Ltd., WEG S.A., Innomotics GmbH, Nidec Motor Corporation, TMEIC Corporation, SEW-EURODRIVE GmbH & Co KG, Bonfiglioli S.p.A., VEM GmbH, Hyosung Heavy Industries Corporation, CG Power And Industrial Solutions Limited, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Variable Frequency Drive Motors market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Variable Frequency Drive Motors Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Variable Frequency Drive Motors Market, Segmentation by Type:

Below 7.5 kW

7.5 kW To 75 kW

Above 75 kW To 375 kW

Above 375 kW

Global Variable Frequency Drive Motors Market, Segmentation by Motor Technology:

Squirrel-Cage Induction Motors

Permanent Magnet Synchronous Motors

Synchronous Reluctance Motors

Others, Including Wound-Rotor And Special Synchronous Motors

Global Variable Frequency Drive Motors Market, Segmentation by Voltage Class:

Up To 1 kV

Above 1 kV To 6.6 kV

Above 6.6 kV

Global Variable Frequency Drive Motors Market, Segmentation by Application:

Pumps

Fans And Blowers

Compressors

Others

Companies Profiled:

ABB Ltd.

WEG S.A.

Innomotics GmbH

Nidec Motor Corporation

TMEIC Corporation

SEW-EURODRIVE GmbH & Co KG

Bonfiglioli S.p.A.

VEM GmbH

Hyosung Heavy Industries Corporation

CG Power And Industrial Solutions Limited

Kirloskar Electric Company Limited

Bharat Bijlee Limited

Lafert S.p.A.

Hitachi Industrial Equipment Systems Co., Ltd.

Wolong Electric Drive Group Co., Ltd.

Harbin Electric Corporation Jiamusi Electric Machine Co., Ltd.

Xiangtan Electric Manufacturing Co., Ltd.

Anhui Wannan Electric Machine Co., Ltd.

Jiangsu Dazhong Electric Motor Co., Ltd.

Shandong Huali Electric Motor Group Co., Ltd.

Xi'an Simo Motor Co., Ltd.

CRRC Zhuzhou Electric Co., Ltd.

TECO Electric & Machinery Co., Ltd.

Zhongshan Broad-Ocean Motor Co., Ltd.

Jiangxi Special Electric Motor Co., Ltd.

Zhejiang Jinlong Motor Co., Ltd.

Zhejiang Dawei Motor Co., Ltd.

Shandong Shanbo Motor Group Co., Ltd.

Key Questions Answered:

1. How big is the global Variable Frequency Drive Motors market?
2. What is the demand of the global Variable Frequency Drive Motors market?
3. What is the year over year growth of the global Variable Frequency Drive Motors market?
4. What is the production and production value of the global Variable Frequency Drive Motors market?
5. Who are the key producers in the global Variable Frequency Drive Motors market?
6. What are the growth factors driving the market demand?

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