

Global 3 Phase Squirrel Cage Induction Motor Market Growth 2026-2032

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Abstracts

The global 3 Phase Squirrel Cage Induction Motor market size is predicted to grow from US\$ 35687 million in 2025 to US\$ 51454 million in 2032; it is expected to grow at a CAGR of 5.4% from 2026 to 2032.

3 Phase Squirrel Cage Induction Motor is an industrial AC asynchronous motor driven by a three-phase AC power supply; it operates by generating a rotating magnetic field in the stator that induces electromagnetic interaction with the squirrel-cage rotor, thereby converting energy into mechanical torque output. Comprising components such as the stator core, stator windings, squirrel-cage rotor, bearings, housing, cooling fan, end shields, insulation system, and associated electrical parts, it is one of the most widely used drive units in the industrial sector. Characterized by a simple structure, stable operation, low maintenance costs, high reliability, and suitability for continuous duty, these motors are extensively applied in pumps, fans, compressors, conveying equipment, machine tools, industrial automation systems, and new energy equipment. This study focuses on industrial three-phase squirrel-cage induction motors across various power ratings, voltage levels, efficiency classes, protection ratings, and mounting configurations.

Key Findings

Global shipments reached 128 million units in 2025

Average selling price reached US\$285 per unit

Low-voltage motors dominate global demand

7.5-75 kW motors represent key industrial segment

Average gross margin reached 22%-32%

Industrial equipment drives major consumption

Market Trends

The three-phase squirrel cage induction motor industry is undergoing transformation toward higher efficiency, intelligent operation, lightweight design, and deeper integration with digital industrial systems. Driven by global energy-saving regulations and industrial decarbonization requirements, high-efficiency motors meeting IE3, IE4, and IE5 standards are gradually replacing traditional efficiency products. Manufacturers are increasingly optimizing electromagnetic design, improving rotor and stator materials, reducing energy losses, and integrating variable frequency drive compatibility to improve operational efficiency. At the same time, the combination of industrial IoT, sensors, and predictive maintenance technologies is enabling motors to evolve from standalone power components into intelligent drive units. Future development will focus on energy efficiency improvement, intelligent monitoring, compact structure, and customized solutions for automation, renewable energy equipment, and advanced manufacturing systems.

Market Dynamics

Drivers

The growth of industrial automation, manufacturing modernization, energy efficiency upgrades, and infrastructure development are major drivers for three-phase squirrel cage induction motors. These motors remain the preferred choice for pumps, fans, compressors, conveyors, and general industrial machinery due to their reliability, cost advantages, and mature manufacturing technology. Increasing demand for energy-saving equipment replacement, smart factories, water treatment systems, renewable energy facilities, and industrial electrification is creating continuous demand for higher-efficiency motor products.

Restraints

The market faces challenges from raw material price fluctuations, increasing efficiency requirements, and competition from alternative motor technologies. Copper, silicon steel

sheets, aluminum, and steel components represent important cost factors, making manufacturers vulnerable to commodity price changes. In addition, permanent magnet synchronous motors and other high-efficiency motor technologies are gaining adoption in certain applications, creating competitive pressure in high-performance segments. Manufacturers must continuously invest in technology upgrades while maintaining cost competitiveness.

Opportunities

Future opportunities are concentrated in energy-saving retrofit projects, industrial digitalization, intelligent manufacturing, and emerging equipment applications. The replacement of inefficient motors with IE4 and IE5 high-efficiency products provides significant market potential. Integration with variable frequency drives, industrial control systems, and condition monitoring platforms enables manufacturers to provide higher-value motor solutions. Growth in renewable energy equipment, electric infrastructure, automated production lines, and advanced industrial machinery will further expand application opportunities.

Challenges

The industry faces challenges including increasingly strict energy efficiency standards, technology competition, supply chain cost pressure, and demand differences across regions. Motor manufacturers need to balance efficiency improvement, manufacturing cost control, product reliability, and customization requirements. In addition, maintaining global certification compliance and developing localized service capabilities are becoming increasingly important for international competition.

Industry Chain Analysis

The three-phase squirrel cage induction motor industry chain consists of upstream material suppliers, midstream motor manufacturers, and downstream equipment industries. Upstream suppliers provide silicon steel sheets, copper wire, aluminum conductors, cast iron or aluminum housings, bearings, insulation materials, magnetic components, electronic control units, and other mechanical parts. Midstream manufacturers are responsible for motor design, electromagnetic optimization, machining, assembly, testing, efficiency certification, and customized product development. Downstream customers include industrial equipment manufacturers, OEMs, system integrators, and end users in manufacturing, power generation, water treatment, petrochemical, mining, HVAC, and renewable energy sectors. Value creation

is concentrated in motor efficiency technology, electromagnetic design capability, manufacturing precision, reliability improvement, and intelligent monitoring integration.

Segment Insights

Three-phase squirrel cage induction motors can be segmented by voltage level, power rating, efficiency class, housing material, and application field. By voltage level, low-voltage motors represent the largest segment due to their extensive use in general industrial equipment, pumps, fans, and automation systems. Medium-voltage and high-voltage motors mainly serve heavy industries such as mining, petrochemical, metallurgy, and power generation, where high-load continuous operation is required.

By power rating, motors between 7.5 kW and 75 kW represent an important industrial segment because they balance performance, cost, and application flexibility. Small-power motors are widely used in auxiliary equipment and light industrial applications, while large-power motors are mainly used in heavy-duty machinery. By housing material, cast iron housing motors dominate industrial applications due to their strength and vibration resistance, while aluminum alloy housing motors are increasingly used in applications requiring lightweight design and improved heat dissipation.

Downstream Market Opportunities

The downstream market mainly includes industrial manufacturing, power systems, water treatment, petrochemical facilities, mining operations, construction HVAC systems, renewable energy equipment, and smart manufacturing applications. Pumps, fans, and compressors remain the largest consumption areas due to their continuous operating requirements. Future demand growth will come from industrial energy-saving upgrades, automated production systems, intelligent factories, and equipment replacement projects. The increasing adoption of digital monitoring and predictive maintenance solutions will also create opportunities for value-added motor services.

Regional Insights

Asia-Pacific represents the largest regional market due to its extensive manufacturing base, industrial infrastructure expansion, and rapid automation development. China, Japan, South Korea, and Southeast Asian countries maintain strong demand supported by manufacturing industries, industrial equipment production, and energy efficiency upgrades. Europe has strong demand for high-efficiency motors driven by strict energy regulations and industrial sustainability targets. North America remains a mature but

stable market supported by industrial modernization, infrastructure investment, and replacement of aging equipment.

Competitive Landscape Analysis

The three-phase squirrel cage induction motor market consists of global industrial motor manufacturers, automation solution providers, and regional motor specialists. Companies such as NIDEC, WEG, ABB, Innomotics, Regal Rexnord, Mitsubishi Electric, TECO, VEM, Wolong, and Jiangtian Electric have established capabilities in industrial motor manufacturing, energy-efficient product development, and global customer service. International companies maintain advantages in high-efficiency motors, automation integration, and global supply networks, while Chinese manufacturers compete through manufacturing scale, cost advantages, and localized service capabilities. Future competition will increasingly focus on IE4/IE5 efficiency technology, digital monitoring functions, variable frequency drive compatibility, customized industrial solutions, and lifecycle service capabilities.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “3 Phase Squirrel Cage Induction Motor Industry Forecast” looks at past sales and reviews total world 3 Phase Squirrel Cage Induction Motor sales in 2025, providing a comprehensive analysis by region and market sector of projected 3 Phase Squirrel Cage Induction Motor sales for 2026 through 2032. With 3 Phase Squirrel Cage Induction Motor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world 3 Phase Squirrel Cage Induction Motor industry.

This Insight Report provides a comprehensive analysis of the global 3 Phase Squirrel Cage Induction Motor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 3 Phase Squirrel Cage Induction Motor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 3 Phase Squirrel Cage Induction Motor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 3 Phase Squirrel Cage Induction Motor and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging

pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 3 Phase Squirrel Cage Induction Motor.

This report presents a comprehensive overview, market shares, and growth opportunities of 3 Phase Squirrel Cage Induction Motor market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low-pressure Type

Medium-pressure Type

High-pressure Type

Segmentation by Power:

Power: <0.75 kW

Power: 0.75–7.5 kW

Power: 7.5–75 kW

Power: >75 kW

Segmentation by Housing Material:

Cast-iron Housing Type

Aluminum Alloy Housing Type

Segmentation by Application:

Compressors

Conveying Equipment

Machine Tools

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

NIDEC

Menzel Motor

MGM Motori Elettrici

WEG

Langlois France

Jiangsu Baozhong

ABB

Innomotics

Regal Rexnord

Jiangtian Electric

TECO-motors

VEM

Mitsubishi Electric

FUKUTA

WOLONG

Shaanxi Asynchronous Xima Motor

XIANGDIAN

Key Questions Addressed in this Report

What is the 10-year outlook for the global 3 Phase Squirrel Cage Induction Motor market?

What factors are driving 3 Phase Squirrel Cage Induction Motor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 3 Phase Squirrel Cage Induction Motor market opportunities vary by end market size?

How does 3 Phase Squirrel Cage Induction Motor break out by Type, by Application?

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