

Gear Motor Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Gearbox and Gear Motor), By Rated Power (Up to 7.5kW, 7.5kW to 75kW and Above 75kW), By Gear Type (Helical, Helical-Bevel, Planetary and Worm), By End-User Industry (Wind Power, Material Handling, Food & Beverage, Cement & Aggregates and Others), By Region, Competition

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Abstracts

The Global Gear Motor Market was valued at USD 17.42 billion in 2022 and is projected to reach USD 26.18 billion during the year 2028, growing at a CAGR of 5.68% during the forecast period. The gear motors market is driven by various factors, including the expansion of wind energy installations, the cost-effectiveness and compactness of gear motors, and increasing concerns regarding the efficiency of mechanical power transmission. With their modular design, gear motors have gained significant popularity due to their adaptability and cost-effectiveness in recent years. Geared motors are widely recognized as a cost-effective solution for various power transmission applications, ranging from mechanical to industrial and beyond. However, as emerging technologies like variable frequency drives and electric drives gain widespread adoption, the market for geared motors may face challenges in terms of growth and advancement.

Key Market Drivers

Increased Investments in Power Generation to Boost Market Growth

The power infrastructure presents a significant developmental challenge, as approximately one billion people in developing nations lack access to electricity. Energy serves as a crucial catalyst for economic growth and development, acting as a vital input for economic activities across various scales and sectors, including households. Moreover, gear motors find extensive application in power generation plants such as thermal power plants, wind plants, and others. Notably, countries like China, Japan, Germany, India, and the U.S. are actively investing in renewable energy to mitigate carbon emissions. The International Energy Agency (IEA) highlights the continuous growth in electricity demand. In March 2023, the Government of India approved 100% Foreign Direct Investment (FDI) in the mining sector, particularly in the exploration of metallic and non-metallic ores using automated methods, aiming to bolster sector growth. This development is anticipated to drive market growth during the forecast period. Gear motors find application in wind plants, ash handling conveyors, coal handling conveyors, rotary airlock valves, traveling grates, screw conveyors, screw feeders, bagasse feeders, bagasse extractors, and more. According to the U.S. Department of Energy, wind power generation in the U.S. is projected to reach approximately 379.8 billion kilowatt hours in 2021, making it the primary source of renewable energy generation, surpassing conventional hydropower. Furthermore, the U.S. is increasing its investments in wind energy, with further growth expected in the forecast period.

Growing Number of Manufacturing Facilities to Drive Demand for Gear Motor

Gearboxes and motors play a crucial role in managing various industrial and repair functions within today's industrial landscape. They function as devices that regulate the speed of electric motors to achieve desired operating speeds. Comprising gears that form a kinematic chain interact with a series of rotating components. With the growth of manufacturing industries, there has been a notable surge in market demand. Moreover, different industries require specific types of motors to meet their unique requirements. These motors are manufactured using high-quality materials and are engineered to deliver optimal performance, ensuring smooth and prolonged operation of machinery. Available in different sizes and ratios, they effectively convert mechanical power into high speed and torque. Industries such as metal processing, chemical, rubber, and plastic heavily rely on a diverse range of machinery, necessitating a wide variety of gearboxes/motors, including planetary gears and helical gears, to accommodate different gear ratios and torque capacities. Standard configurations of gearboxes/motors are readily available for use in industrial units. Notably, the Indian manufacturing sector has witnessed a significant 460% growth in 2021-22 compared to 2019-20, and private sector investments have seen a rise of 145-150% in 2021-22 compared to the previous

financial year.

Key Market Challenges

Economic Volatility and Market Uncertainty

The Global Gear Motor Market is intrinsically linked to economic cycles and market fluctuations. Economic volatility, geopolitical tensions, and shifts in consumer behavior can impact the demand for industrial products, including gear motors. During periods of economic downturns or uncertainty, industries may reduce capital expenditures, resulting in decreased orders for gear motors. Market uncertainty can also influence investment decisions, posing challenges for gear motor manufacturers in planning for long-term growth and expansion. In such an environment, maintaining a stable customer base and cultivating strong relationships with key clients become pivotal in navigating market fluctuations. To address economic challenges, gear motor manufacturers often prioritize diversifying their customer base across various industries and geographical regions. This approach helps mitigate risks associated with over-reliance on a single market. Additionally, maintaining lean operations and production flexibility enables companies to swiftly adapt to changing market conditions and fluctuations in demand.

Intense Market Competition and Price Pressure

The Global Gear Motor Market encounters a persistent challenge in the form of intense competition, resulting in downward pressure on prices. As a vital component in various industrial applications, gear motors are highly sought after across sectors such as manufacturing, automotive, construction, and more. Consequently, there has been a proliferation of gear motor manufacturers, comprising both established players and new entrants, all striving to secure their market share. The abundance of suppliers and the availability of similar products often give rise to price-centric competition, which can erode profit margins and impede the growth of gear motor manufacturers. Companies find themselves navigating a delicate balance between maintaining competitive prices and ensuring sustainable profitability. In this fiercely competitive landscape, differentiation through product quality, innovation, and value-added services becomes pivotal for companies to establish their unique identity and maintain a stable market position.

Key Market Trends

Rising Demand for Energy-Efficient Solutions

One of the key trends driving the Global Gear Motor Market is the growing demand for energy-efficient gear motor solutions. As industries aim to minimize their environmental impact and reduce operational costs, there is an increasing focus on selecting equipment that consumes less energy. Gear motors, as vital components in various industrial applications, play a crucial role in achieving these sustainability objectives. Manufacturers are responding by developing gear motors with enhanced efficiency and reduced energy consumption. This trend aligns with the stringent energy efficiency regulations set by different countries and international organizations. Companies are incorporating advanced materials, precision engineering, and optimized gear designs to minimize friction losses and improve overall efficiency. Furthermore, the integration of variable frequency drives (VFDs) and smart control systems enhances the ability to match motor speed with load requirements, contributing further to energy savings. The adoption of energy-efficient gear motors not only reduces operational expenses but also positions industries as responsible environmental stewards.

Segmental Insights

Gear Type Insights

Helical segment is expected to dominate the market during the forecast period. Helical gear motors are a type of gear motor that utilizes helical gears, featuring teeth cut at an angle to the gear axis. This design characteristic offers distinct advantages that have propelled their widespread use in diverse industrial applications. Notably, one of the key benefits lies in their remarkable efficiency. The gradual engagement of helical gears ensures smoother and quieter operation, setting them apart from other gear types. This reduced noise and vibration make helical gear motors particularly suitable for applications where quiet operation is paramount, such as in food and beverage production or medical equipment. Helical gear motors find extensive applications across industries, including manufacturing, packaging, material handling, automotive, and more. They are commonly employed in conveyors, mixers, pumps, agitators, cranes, and various machinery where seamless operation, high torque, and reliability are indispensable.

Product Insights

The gearbox segment is expected to dominate the market during the forecast period. Gearboxes play a crucial role in converting motor speed and torque to the desired

output, making them indispensable components in a wide range of applications. One of the key functions of gearboxes is to optimize the relationship between motor speed and load requirements. By adjusting gear ratios, gearboxes ensure efficient motor operation within the optimal speed range while delivering the required torque output. Moreover, gearboxes facilitate directional control of rotation and power transmission over distances. They find widespread use across various industries, including manufacturing, automotive, aerospace, construction, and mining. Common applications encompass conveyor systems, robotics, packaging machinery, industrial pumps, and automotive transmissions. The integration of Industry 4.0 technologies, such as sensors and connectivity features, is revolutionizing gearboxes into intelligent components. Smart gearboxes offer real-time data on parameters like temperature, vibration, and load conditions, enabling predictive maintenance, remote monitoring, and performance optimization, thereby enhancing overall system reliability.

Regional Insights

Asia Pacific is expected to dominate the market during the forecast period. The Asia-Pacific (APAC) region plays a crucial role in the Global Gear Motor Market, thanks to its strong industrial base and rapid economic growth. With a wide range of industries, including manufacturing, automotive, construction, mining, and energy, APAC serves as a significant driver for gear motor demand across various applications such as conveyor systems, industrial machinery, and robotics. Key characteristics of the APAC segment include its expansive manufacturing capabilities, diverse consumer base, and ongoing industrialization. The continuous demand for goods and products in different sectors necessitates the use of gear motors for efficient production processes, material handling, and transportation. Moreover, many countries in the APAC region are increasingly prioritizing energy efficiency and sustainable practices. This growing trend is leading to the adoption of energy-efficient gear motors in various industries. Recognizing the importance of reducing energy consumption and minimizing environmental impact, both governments and industries are actively seeking gear motor solutions that align with these sustainability goals.

Key Market Players

Bonfiglioli S.P.A.

Watt Drive Antriebstechnik GmbH

Bauer Gear GmbH

Nidec Corporation

Siemens AG

Johnson Electric Holdings Limited

Shanthi Gears Limited

Emerson Electric Co

Jiangsu Guomao Reducer Co. Ltd.

Brevini Power Transmission S.P.A.

Report Scope:

In this report, the Global Gear Motor Market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

Global Gear Motor Market, By Product:

Gearbox

Gear Motor

Global Gear Motor Market, By Rated Power:

Up to 7.5kW

7.5kW to 75kW

Above 75kW

Global Gear Motor Market, By Gear Type:

Helical

Helical-Bevel

Planetary

Worm

Global Gear Motor Market, By End-User Industry:

Wind Power

Material Handling

Food & Beverage

Cement & Aggregates

Others

Global Gear Motor Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Gear Motor Market.

Available Customizations:

Global Gear Motor Market report with the given market data, Tech Sci Research offers

customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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