

# **Permanent Magnet Motor Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (AC motors, DC Motors, Hermetic motors), By Magnet Type (Neodymium, Samarium Cobalt, Ferrite), By Power Range (4.0 kW and below, Between 4.0 22.0 kW, Between 22.0 75.0 kW, 75.0 kW and above), By Applications (Factory Automation, Office Automation, Lab Equipment, Military/Aerospace), By Region, By Competition**

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## **Abstracts**

Global Permanent Magnet Motor Market has valued at USD 22.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 15.19% through 2028.

The Permanent Magnet Motor market refers to the global industry segment dedicated to the production, distribution, and utilization of Permanent Magnet Motors (PMMs). These motors are electromechanical devices that generate motion or mechanical power through the interaction of permanent magnets and electromagnetic coils, eliminating the need for traditional field windings found in other types of motors. Permanent Magnet Motors are renowned for their high energy efficiency, compact size, and exceptional performance characteristics, making them a preferred choice across various sectors and applications. Industries such as automotive, industrial automation, renewable energy, aerospace, and consumer electronics heavily rely on PMMs for their energy conversion and motion control needs. This market encompasses a broad spectrum of

PMM types, including brushless DC motors (BLDC), synchronous motors, and various specialized configurations. It involves the production of these motors, their integration into diverse applications, and the supporting supply chain for raw materials, components, and technologies. The Permanent Magnet Motor market is influenced by factors such as technological advancements, environmental regulations, energy efficiency requirements, and global supply chain dynamics. Its growth and evolution are closely linked to the ongoing pursuit of cleaner and more efficient energy solutions in a wide range of industries worldwide.

## Key Market Drivers

### Growing Demand for Energy-Efficient Technologies

The global Permanent Magnet Motor market is being driven by the increasing demand for energy-efficient technologies across various industries. As the world grapples with environmental concerns and the need to reduce greenhouse gas emissions, there is a growing emphasis on finding more efficient ways to generate and utilize energy. Permanent Magnet Motors (PMMs) offer a highly efficient solution for converting electrical energy into mechanical power, making them a key component in the quest for greater energy efficiency. Industries such as automotive, industrial automation, and renewable energy have recognized the benefits of PMMs in terms of reduced energy consumption and improved overall system performance. In the automotive sector, for example, electric vehicles (EVs) rely heavily on PMMs for propulsion, as they are known for their high power density and energy conversion efficiency. As the adoption of EVs and other energy-efficient technologies continues to rise, the demand for PMMs is expected to follow suit.

### Growing Renewable Energy Sector

The global shift towards renewable energy sources is another significant driver of the Permanent Magnet Motor market. PMMs are an essential component in renewable energy systems such as wind turbines and hydropower generators. These motors are highly efficient and can operate effectively in variable-speed applications, making them ideal for capturing energy from renewable sources. The increasing focus on reducing reliance on fossil fuels and transitioning to clean energy sources has led to a surge in the construction of wind farms and hydropower plants. These projects require a substantial number of PMMs to convert kinetic energy into electrical power. As countries around the world invest in expanding their renewable energy capacities, the demand for PMMs in this sector is expected to continue growing.

## Automotive Electrification

The automotive industry's push toward electrification is a significant driver for the Permanent Magnet Motor market. Electric vehicles (EVs) and hybrid vehicles rely heavily on PMMs for propulsion and various auxiliary functions. The demand for EVs is on the rise due to environmental concerns, government incentives, and advancements in battery technology. PMMs are integral to the electric drivetrains of these vehicles, providing efficient power conversion and precise control. In addition to propulsion, PMMs are used in various automotive applications, including power steering, regenerative braking, and HVAC systems. As automakers worldwide accelerate their efforts to electrify their vehicle fleets, the demand for PMMs in the automotive sector is expected to surge.

## Industrial Automation and Robotics

The rapid growth of industrial automation and robotics is a significant driver for the Permanent Magnet Motor market. PMMs are essential components in robotic systems, CNC machines, and various industrial automation applications. These motors offer high precision, speed, and torque control, making them ideal for tasks that require accuracy and repeatability. As industries seek to enhance productivity, reduce labor costs, and improve the quality of their manufacturing processes, the adoption of automation and robotics is increasing. This trend is particularly noticeable in sectors such as manufacturing, logistics, and healthcare. The versatility and efficiency of PMMs make them a preferred choice for powering the motion systems of industrial robots and automated machinery.

## Aerospace and Defense Applications

The aerospace and defense sectors are driving demand for Permanent Magnet Motors due to their unique requirements for lightweight and high-performance motors. PMMs are used in various aerospace and defense applications, including aircraft actuation systems, missile guidance systems, and unmanned aerial vehicles (UAVs). These motors offer a combination of high power density and reliability, making them crucial in mission-critical scenarios. As defense budgets continue to allocate resources to advanced technology development, and the aerospace industry explores electric propulsion for aircraft and spacecraft, the demand for PMMs in these sectors is poised to grow significantly.

## Medical Devices and Healthcare Automation

The medical device and healthcare automation industries are emerging as important drivers of the Permanent Magnet Motor market. PMMs find applications in medical devices such as MRI machines, infusion pumps, and surgical robots. These motors provide the precision and control required for intricate medical procedures and diagnostics. Furthermore, the growing trend of healthcare automation, including the use of robotic surgery systems and automated drug dispensing, relies on PMMs for precise motion control and reliability. As healthcare organizations and providers seek to enhance patient outcomes and reduce human error, the demand for PMMs in the medical and healthcare sectors is set to increase.

In conclusion, the global Permanent Magnet Motor market is being propelled forward by a convergence of factors, including the drive for energy efficiency, the expansion of renewable energy sources, automotive electrification, industrial automation, aerospace and defense applications, and the growing adoption of medical devices and healthcare automation. These drivers are reshaping industries across the board, fueling the demand for PMMs and fostering innovation in motor technology.

## Government Policies are Likely to Propel the Market

### Renewable Energy Mandates and Incentives

One of the most significant government policies shaping the global Permanent Magnet Motor market is the implementation of renewable energy mandates and incentives. Governments worldwide have recognized the importance of transitioning to cleaner and more sustainable energy sources to combat climate change and reduce dependence on fossil fuels. To achieve these goals, they have introduced policies that promote the use of Permanent Magnet Motors (PMMs) in renewable energy applications. Renewable energy mandates require utilities and energy providers to generate a specific percentage of their energy from renewable sources, such as wind and solar power. These mandates create a consistent and growing demand for PMMs, as they are crucial components in renewable energy systems, including wind turbines and hydropower generators. In addition to mandates, governments often offer financial incentives such as tax credits, rebates, and grants to encourage investments in renewable energy projects that use PMMs. These policies not only drive the adoption of PMMs but also stimulate innovation in motor technology, leading to improved efficiency and performance.

## Environmental Regulations and Emission Reduction Targets

Environmental regulations and emission reduction targets set by governments worldwide play a pivotal role in shaping the Permanent Magnet Motor market. As concerns about air quality and greenhouse gas emissions grow, governments have implemented stringent regulations to limit the environmental impact of various industries. PMMs are favored in many industries, including automotive, because of their energy efficiency and reduced carbon footprint. Government policies that impose emissions limits and fuel economy standards have pushed automakers to adopt PMMs in electric vehicles (EVs) and hybrid vehicles to meet these requirements. Furthermore, environmental regulations often encourage the use of PMMs in industrial applications by promoting energy-efficient manufacturing processes and machinery. These policies drive the demand for PMMs in sectors such as industrial automation and manufacturing.

## Research and Development Funding

Governments worldwide are investing in research and development (R&D) funding programs to advance the technology and competitiveness of their domestic Permanent Magnet Motor industries. R&D funding supports the development of innovative motor designs, materials, and manufacturing processes, leading to higher efficiency, reliability, and performance. These government-funded initiatives often collaborate with academic institutions, research centers, and private companies to accelerate the development of PMMs. By providing financial support and creating a conducive environment for research, governments ensure that their nations remain at the forefront of motor technology, enhancing their global competitiveness.

## Trade Tariffs and Export Restrictions

Trade tariffs and export restrictions imposed by governments can significantly impact the global Permanent Magnet Motor market. These policies can affect the cost of raw materials, components, and finished PMMs, leading to fluctuations in prices and availability. Tariffs on rare earth metals and other essential materials used in the production of PMMs can disrupt supply chains and increase manufacturing costs. Export restrictions can limit the availability of PMMs from certain countries, prompting manufacturers to explore alternative sources and technologies. Government policies in this regard can create uncertainty in the market and influence sourcing decisions made by motor manufacturers, affecting the global distribution of PMMs.

## Intellectual Property Protection

Government policies related to intellectual property protection play a vital role in shaping the Permanent Magnet Motor market. Strong patent laws and regulations safeguard the innovations and designs developed by motor manufacturers, encouraging them to invest in R&D and innovation. These policies ensure that companies can protect their intellectual property and recoup their investments through exclusive rights to their technology. This, in turn, fosters competition and drives continuous improvement in PMM technology. Effective intellectual property protection also encourages foreign investments and collaborations, as companies can trust that their innovations will be secure in the global market.

### Energy Efficiency Standards and Labeling

Government policies concerning energy efficiency standards and labeling programs impact the adoption of PMMs in various applications. These policies aim to inform consumers and businesses about the energy efficiency of appliances, machinery, and vehicles, allowing them to make informed choices. Energy efficiency standards often include performance requirements that promote the use of PMMs in appliances and industrial equipment. Labeling programs provide consumers with clear information about the energy consumption of products, making it easier for them to choose energy-efficient options that often incorporate PMMs. By encouraging the use of PMMs through energy efficiency policies, governments promote sustainable practices and reduce energy consumption, contributing to a greener and more efficient future.

In conclusion, government policies have a profound impact on the global Permanent Magnet Motor market. Renewable energy mandates, environmental regulations, R&D funding, trade tariffs, intellectual property protection, and energy efficiency standards collectively shape the market's dynamics, influencing adoption rates, innovation, and competitiveness in the industry. Staying attuned to these policies is crucial for businesses operating in this sector.

### Key Market Challenges

#### Supply Chain Vulnerabilities and Dependence on Rare Earth Materials

One of the primary challenges facing the global Permanent Magnet Motor market is its vulnerability to disruptions in the supply chain and its heavy dependence on rare earth materials. Permanent Magnet Motors (PMMs) rely on rare earth elements like neodymium, dysprosium, and samarium to create the powerful magnetic fields

necessary for their operation. These materials are not only limited in supply but also subject to geopolitical tensions, trade restrictions, and fluctuations in availability. China is a dominant supplier of rare earth materials, accounting for a significant portion of global production. The market's dependence on a single source creates inherent risks, as disruptions in the supply chain, trade disputes, or export restrictions can lead to shortages and price volatility. Such disruptions can have cascading effects on industries that rely heavily on PMMs, including automotive, renewable energy, and industrial automation. To mitigate this challenge, there is a growing need for diversification of rare earth material sources and investment in recycling and substitution technologies. Manufacturers are exploring alternative magnet materials and designs that reduce dependence on critical rare earths, but these solutions are still in the early stages of development. Balancing supply chain resilience with sustainability concerns is a complex challenge that the PMM market must address.

### Technological Advancements and Innovation

While technological advancements are generally viewed as a positive force, they also present a significant challenge for the global Permanent Magnet Motor market. As technology evolves, expectations for motor efficiency, performance, and sustainability continue to rise. This creates a constant pressure on manufacturers to innovate and develop new motor designs and materials. One key aspect of this challenge is the demand for higher energy efficiency. Governments worldwide are implementing stricter energy efficiency standards and regulations, compelling manufacturers to enhance the performance of PMMs. Meeting these standards often requires costly research and development efforts and can impact the cost-effectiveness of existing motor designs. Moreover, as technology advances, there is a risk of obsolescence for older PMM technologies. Manufacturers must keep pace with evolving customer preferences and emerging technologies, such as advanced materials, digital control systems, and additive manufacturing techniques. Failing to adapt to these innovations can lead to market share erosion and competitive disadvantages. Another aspect of technological advancement is the continuous quest for lighter, smaller, and more powerful motors. This presents a dual challenge of miniaturization and maintaining reliability and performance. In applications such as consumer electronics and electric vehicles, there is a growing demand for compact yet high-performance PMMs, pushing manufacturers to strike a delicate balance between size and capability.

In response to these challenges, industry players must invest in research and development, stay attuned to market trends, and collaborate with academia and research institutions to remain competitive and meet evolving customer demands.

Adapting to technological advancements while ensuring the sustainability and cost-effectiveness of PMMs will be an ongoing challenge for the global market.

## Segmental Insights

### DC motors Insights

The DC motors segment had the largest market share in 2022 & expected to maintain it in the forecast period. DC (Direct Current) motors, particularly Brushless DC (BLDC) motors, are gaining prominence in the global Permanent Magnet Motor market due to several key advantages that make them a preferred choice in various applications. While it's important to note that the dominance of DC motors over AC motors depends on the specific application and industry, there are some reasons why DC motors, especially BLDC motors, are becoming more prevalent for instance, BLDC motors are known for their high energy efficiency. They offer improved efficiency compared to traditional brushed DC motors and even some types of AC motors. This efficiency translates to reduced energy consumption and operating costs, making them highly attractive in applications where energy efficiency is crucial. DC motors, especially BLDC motors, provide precise speed and position control. They offer excellent torque control at both low and high speeds, making them ideal for applications that require accurate and responsive motor performance, such as robotics, drones, and CNC machines. BLDC motors have a longer operational life compared to brushed DC motors because they do not have brushes that wear out over time. This results in reduced maintenance requirements, lower downtime, and longer service life, making them cost-effective choices for industries where uptime is critical. BLDC motors are typically more compact and lightweight than their AC counterparts, making them suitable for applications with space constraints. Their smaller form factor allows for more versatile and flexible integration into various devices and systems. BLDC motors generate less electromagnetic interference compared to some AC motors, which is advantageous in applications sensitive to EMI, such as medical equipment and electronics. BLDC motors are well-suited for battery-powered devices and electric vehicles (EVs) due to their efficiency and ability to operate effectively at variable speeds. The growth of the EV market has driven the demand for BLDC motors. BLDC motors are commonly used in renewable energy applications like wind turbines because they can efficiently convert variable wind speeds into electricity. This is crucial in the expansion of the renewable energy sector.

### Neodymium Insights



The Neodymium segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Neodymium magnets, specifically Neodymium Iron Boron (NdFeB) magnets, possess remarkable magnetic properties, including high magnetic strength and energy density. They have the highest magnetic energy product of any commercially available permanent magnets. This strength allows Neodymium magnets to generate powerful magnetic fields, making them highly efficient in PMMs. Neodymium magnets can produce strong magnetic fields in relatively small sizes. This compactness is crucial in applications where space is limited, such as electric vehicles (EVs), robotics, and consumer electronics. The combination of high magnetic strength and a small footprint results in PMMs with superior power-to-size ratios. PMMs utilizing Neodymium magnets are known for their energy efficiency. They require less electrical input to generate the required mechanical output, leading to reduced energy consumption and operational costs. This energy efficiency is a critical factor in industries striving to minimize energy waste and meet stringent environmental regulations. Neodymium magnets can be easily customized and shaped to fit various motor designs and applications. Their versatility makes them suitable for a wide range of industries, including automotive, industrial automation, renewable energy, and aerospace. They can adapt to various operating conditions and are well-suited for both low and high-speed applications. While Neodymium magnets are relatively expensive compared to other permanent magnet materials, their cost-effectiveness is justified by the improved motor performance and energy efficiency they offer. Over the long term, the benefits of reduced energy consumption and enhanced motor performance often outweigh the initial investment in Neodymium magnets. Neodymium magnets are widely available from numerous manufacturers and suppliers worldwide. This ensures a stable supply chain for industries relying on PMMs, reducing the risk of supply disruptions. As consumers become increasingly environmentally conscious and seek more energy-efficient products, industries are under pressure to adopt technologies that reduce energy consumption. Neodymium magnets align with this demand by enabling the creation of energy-efficient PMMs that power everything from electric vehicles to household appliances.

## Regional Insights

### Asia Pacific

The Asia Pacific region had the largest market for permanent magnet motors in 2022. The growth of this region is being driven by the increasing demand for electric vehicles, wind turbines, and industrial machinery.

China is the largest market for permanent magnet motors in Asia Pacific, followed by India and Japan. China is the world's largest producer and consumer of electric vehicles, and the demand for permanent magnet motors for these vehicles is expected to drive the growth of the market in the region. India is also a major market for electric vehicles, and the demand for permanent magnet motors for these vehicles is expected to grow in the coming years. Japan is a major market for wind turbines, and the demand for permanent magnet motors for these turbines is also expected to drive the growth of the market in the region.

## North America

North America had the second-largest market for permanent magnet motors in 2022. The growth of this region is being driven by the increasing demand for electric vehicles and industrial machinery.

The United States is the largest market for permanent magnet motors in North America, followed by Canada and Mexico. The United States is a major market for electric vehicles, and the demand for permanent magnet motors for these vehicles is expected to drive the growth of the market in the region. Canada and Mexico are also major markets for industrial machinery, and the demand for permanent magnet motors for these machines is also expected to grow in the coming years.

## Key Market Players

ABB LTD

Siemens AG

Nidec Corporation

Schneider Electric SE

Toshiba International Corporation

Ametek Inc.

Rockwell Automation Inc.

Allied Motion Technologies Inc.

Dana TM4

Yaskawa America, Inc.

### Report Scope:

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

#### Permanent Magnet Motor Market, By Type:

AC motors

DC Motors

Hermetic motors

#### Permanent Magnet Motor Market, By Magnet Type:

Neodymium

Samarium Cobalt

Ferrite

#### Permanent Magnet Motor Market, By Power Range:

4.0 kW and below

Between 4.0 22.0 kW

Between 22.0 75.0 kW

75.0 kW and above

## Permanent Magnet Motor Market, By Application:

Factory Automation

Office Automation

Lab Equipment

Military/Aerospace

## Permanent Magnet Motor Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Permanent Magnet Motor Market.

## Available Customizations:

Global Permanent Magnet 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).

## Contents

### 1. PRODUCT OVERVIEW

### 2. RESEARCH METHODOLOGY

### 3. EXECUTIVE SUMMARY

### 4. VOICE OF CUSTOMER

### 5. GLOBAL PERMANENT MAGNET MOTOR MARKET OUTLOOK

#### 5.1. Market Size & Forecast

##### 5.1.1. By Value

#### 5.2. Market Share & Forecast

##### 5.2.1. By Type (AC motors, DC Motors, Hermetic motors),

##### 5.2.2. By Magnet Type (Neodymium, Samarium Cobalt, Ferrite),

##### 5.2.3. By Power Range (4.0 kW and below, Between 4.0 22.0 kW, Between 22.0 75.0 kW, 75.0 kW and above)

##### 5.2.4. By Applications (Factory Automation, Office Automation, Lab Equipment, Military/Aerospace)

##### 5.2.5. By Region

##### 5.2.6. By Company (2022)

#### 5.3. Market Map

### 6. NORTH AMERICA PERMANENT MAGNET MOTOR MARKET OUTLOOK

#### 6.1. Market Size & Forecast

##### 6.1.1. By Value

#### 6.2. Market Share & Forecast

##### 6.2.1. By Type

##### 6.2.2. By Magnet Type

##### 6.2.3. By Power Range

##### 6.2.4. By Application

##### 6.2.5. By Country

#### 6.3. North America: Country Analysis

##### 6.3.1. United States Permanent Magnet Motor Market Outlook

##### 6.3.1.1. Market Size & Forecast

##### 6.3.1.1.1. By Value

- 6.3.1.2. Market Share & Forecast
  - 6.3.1.2.1. By Type
  - 6.3.1.2.2. By Magnet Type
  - 6.3.1.2.3. By Power Range
  - 6.3.1.2.4. By Application
- 6.3.2. Canada Permanent Magnet Motor Market Outlook
  - 6.3.2.1. Market Size & Forecast
    - 6.3.2.1.1. By Value
  - 6.3.2.2. Market Share & Forecast
    - 6.3.2.2.1. By Type
    - 6.3.2.2.2. By Magnet Type
    - 6.3.2.2.3. By Power Range
    - 6.3.2.2.4. By Application
- 6.3.3. Mexico Permanent Magnet Motor Market Outlook
  - 6.3.3.1. Market Size & Forecast
    - 6.3.3.1.1. By Value
  - 6.3.3.2. Market Share & Forecast
    - 6.3.3.2.1. By Type
    - 6.3.3.2.2. By Magnet Type
    - 6.3.3.2.3. By Power Range
    - 6.3.3.2.4. By Application

## **7. EUROPE PERMANENT MAGNET MOTOR MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Type
  - 7.2.2. By Magnet Type
  - 7.2.3. By Power Range
  - 7.2.4. By Application
  - 7.2.5. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. Germany Permanent Magnet Motor Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Type
      - 7.3.1.2.2. By Magnet Type



- 7.3.1.2.3. By Power Range
- 7.3.1.2.4. By Application
- 7.3.2. United Kingdom Permanent Magnet Motor Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Magnet Type
    - 7.3.2.2.3. By Power Range
    - 7.3.2.2.4. By Application
- 7.3.3. Italy Permanent Magnet Motor Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Magnet Type
    - 7.3.3.2.3. By Power Range
    - 7.3.3.2.4. By Application
- 7.3.4. France Permanent Magnet Motor Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Magnet Type
    - 7.3.4.2.3. By Power Range
    - 7.3.4.2.4. By Application
- 7.3.5. Spain Permanent Magnet Motor Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Magnet Type
    - 7.3.5.2.3. By Power Range
    - 7.3.5.2.4. By Application

## **8. ASIA-PACIFIC PERMANENT MAGNET MOTOR MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value

## 8.2. Market Share & Forecast

### 8.2.1. By Type

### 8.2.2. By Magnet Type

### 8.2.3. By Power Range

### 8.2.4. By Application

### 8.2.5. By Country

## 8.3. Asia-Pacific: Country Analysis

### 8.3.1. China Permanent Magnet Motor Market Outlook

#### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

#### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Type

##### 8.3.1.2.2. By Magnet Type

##### 8.3.1.2.3. By Power Range

##### 8.3.1.2.4. By Application

### 8.3.2. India Permanent Magnet Motor Market Outlook

#### 8.3.2.1. Market Size & Forecast

##### 8.3.2.1.1. By Value

#### 8.3.2.2. Market Share & Forecast

##### 8.3.2.2.1. By Type

##### 8.3.2.2.2. By Magnet Type

##### 8.3.2.2.3. By Power Range

##### 8.3.2.2.4. By Application

### 8.3.3. Japan Permanent Magnet Motor Market Outlook

#### 8.3.3.1. Market Size & Forecast

##### 8.3.3.1.1. By Value

#### 8.3.3.2. Market Share & Forecast

##### 8.3.3.2.1. By Type

##### 8.3.3.2.2. By Magnet Type

##### 8.3.3.2.3. By Power Range

##### 8.3.3.2.4. By Application

### 8.3.4. South Korea Permanent Magnet Motor Market Outlook

#### 8.3.4.1. Market Size & Forecast

##### 8.3.4.1.1. By Value

#### 8.3.4.2. Market Share & Forecast

##### 8.3.4.2.1. By Type

##### 8.3.4.2.2. By Magnet Type

##### 8.3.4.2.3. By Power Range

##### 8.3.4.2.4. By Application

### 8.3.5. Australia Permanent Magnet Motor Market Outlook

#### 8.3.5.1. Market Size & Forecast

##### 8.3.5.1.1. By Value

#### 8.3.5.2. Market Share & Forecast

##### 8.3.5.2.1. By Type

##### 8.3.5.2.2. By Magnet Type

##### 8.3.5.2.3. By Power Range

##### 8.3.5.2.4. By Application

## 9. SOUTH AMERICA PERMANENT MAGNET MOTOR MARKET OUTLOOK

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Type

#### 9.2.2. By Magnet Type

#### 9.2.3. By Power Range

#### 9.2.4. By Application

#### 9.2.5. By Country

### 9.3. South America: Country Analysis

#### 9.3.1. Brazil Permanent Magnet Motor Market Outlook

##### 9.3.1.1. Market Size & Forecast

###### 9.3.1.1.1. By Value

##### 9.3.1.2. Market Share & Forecast

###### 9.3.1.2.1. By Type

###### 9.3.1.2.2. By Magnet Type

###### 9.3.1.2.3. By Power Range

###### 9.3.1.2.4. By Application

#### 9.3.2. Argentina Permanent Magnet Motor Market Outlook

##### 9.3.2.1. Market Size & Forecast

###### 9.3.2.1.1. By Value

##### 9.3.2.2. Market Share & Forecast

###### 9.3.2.2.1. By Type

###### 9.3.2.2.2. By Magnet Type

###### 9.3.2.2.3. By Power Range

###### 9.3.2.2.4. By Application

#### 9.3.3. Colombia Permanent Magnet Motor Market Outlook

##### 9.3.3.1. Market Size & Forecast

###### 9.3.3.1.1. By Value

### 9.3.3.2. Market Share & Forecast

#### 9.3.3.2.1. By Type

#### 9.3.3.2.2. By Magnet Type

#### 9.3.3.2.3. By Power Range

#### 9.3.3.2.4. By Application

## **10. MIDDLE EAST AND AFRICA PERMANENT MAGNET MOTOR MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Type

#### 10.2.2. By Magnet Type

#### 10.2.3. By Power Range

#### 10.2.4. By Application

#### 10.2.5. By Country

### 10.3. MEA: Country Analysis

#### 10.3.1. South Africa Permanent Magnet Motor Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Type

###### 10.3.1.2.2. By Magnet Type

###### 10.3.1.2.3. By Power Range

###### 10.3.1.2.4. By Application

#### 10.3.2. Saudi Arabia Permanent Magnet Motor Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Type

###### 10.3.2.2.2. By Magnet Type

###### 10.3.2.2.3. By Power Range

###### 10.3.2.2.4. By Application

#### 10.3.3. UAE Permanent Magnet Motor Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Type

- 10.3.3.2.2. By Magnet Type
- 10.3.3.2.3. By Power Range
- 10.3.3.2.4. By Application
- 10.3.4. Kuwait Permanent Magnet Motor Market Outlook
  - 10.3.4.1. Market Size & Forecast
    - 10.3.4.1.1. By Value
  - 10.3.4.2. Market Share & Forecast
    - 10.3.4.2.1. By Type
    - 10.3.4.2.2. By Magnet Type
    - 10.3.4.2.3. By Power Range
    - 10.3.4.2.4. By Application
- 10.3.5. Turkey Permanent Magnet Motor Market Outlook
  - 10.3.5.1. Market Size & Forecast
    - 10.3.5.1.1. By Value
  - 10.3.5.2. Market Share & Forecast
    - 10.3.5.2.1. By Type
    - 10.3.5.2.2. By Magnet Type
    - 10.3.5.2.3. By Power Range
    - 10.3.5.2.4. By Application

## **11. MARKET DYNAMICS**

## **12. MARKET TRENDS & DEVELOPMENTS**

## **13. COMPANY PROFILES**

- 13.1. ABB LTD
  - 13.1.1. Business Overview
  - 13.1.2. Key Revenue and Financials
  - 13.1.3. Recent Developments
  - 13.1.4. Key Personnel
  - 13.1.5. Key Product/Services
- 13.2. Siemens AG
  - 13.2.1. Business Overview
  - 13.2.2. Key Revenue and Financials
  - 13.2.3. Recent Developments
  - 13.2.4. Key Personnel
  - 13.2.5. Key Product/Services
- 13.3. Nidec Corporation

- 13.3.1. Business Overview
- 13.3.2. Key Revenue and Financials
- 13.3.3. Recent Developments
- 13.3.4. Key Personnel
- 13.3.5. Key Product/Services
- 13.4. Schneider Electric SE
  - 13.4.1. Business Overview
  - 13.4.2. Key Revenue and Financials
  - 13.4.3. Recent Developments
  - 13.4.4. Key Personnel
  - 13.4.5. Key Product/Services
- 13.5. Toshiba International Corporation
  - 13.5.1. Business Overview
  - 13.5.2. Key Revenue and Financials
  - 13.5.3. Recent Developments
  - 13.5.4. Key Personnel
  - 13.5.5. Key Product/Services
- 13.6. Ametek Inc.
  - 13.6.1. Business Overview
  - 13.6.2. Key Revenue and Financials
  - 13.6.3. Recent Developments
  - 13.6.4. Key Personnel
  - 13.6.5. Key Product/Services
- 13.7. Rockwell Automation Inc.
  - 13.7.1. Business Overview
  - 13.7.2. Key Revenue and Financials
  - 13.7.3. Recent Developments
  - 13.7.4. Key Personnel
  - 13.7.5. Key Product/Services
- 13.8. Allied Motion Technologies Inc.
  - 13.8.1. Business Overview
  - 13.8.2. Key Revenue and Financials
  - 13.8.3. Recent Developments
  - 13.8.4. Key Personnel
  - 13.8.5. Key Product/Services
- 13.9. Dana TM4
  - 13.9.1. Business Overview
  - 13.9.2. Key Revenue and Financials
  - 13.9.3. Recent Developments

13.9.4. Key Personnel

13.9.5. Key Product/Services

13.10. Yaskawa America, Inc.

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel

13.10.5. Key Product/Services

## **14. STRATEGIC RECOMMENDATIONS**

## **15. ABOUT US & DISCLAIMER**

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