

Low Voltage Motors Global Market Research Study

FIVE-YEAR MARKET ANALYSIS AND TECHNOLOGY FORECAST THROUGH 2020

REGULATORY LAWS CONTINUE TO SHAPE MARKET

Since 1997, the global integral horsepower (IHP) low voltage (LV) motors market has experienced many changes as a result of various government energy efficiency regulations. These regulations continue to evolve, all having the same objective of transforming the global installed base of low-efficiency motors to energy-saving, high-efficiency motors across all sectors.

The market is expected to regain good growth in the second half of the decade despite the current uncertain global economic environment. By 2017, major markets including the European Union, Japan, and China will have efficiency regulations

that rival North America and effectively create a level playing field across four regions for high efficiency low voltage motors. Beyond 2017, countries and emerging economies with no energy efficiency regulations are expected to remain growth markets for low-efficiency motors.

This study addresses market dynamics and provides analysis of these regulated and unregulated market environments. It also identifies growth segments, market and technology trends, as well as challenges suppliers may face.

For more information, please visit us at www.arcweb.com/market-studies/.

STRATEGIC ISSUES

This study discusses many of the trends occurring in the low voltage motors market, providing valuable insight as to how and to what degree the evolving regulatory environments and new technologies affect revenue growth for both OEMs and end users. This study answers key questions, such as:

- What market share do suppliers have in 2015 at the global and regional level?
- Which high growth markets are the most attractive for suppliers to target?
- What effect do mandatory regulations and disruptive technologies have on the market?

STUDY CONTENTS

EXECUTIVE SUMMARY

Major, Industry, and Regional Trends
Strategies for Success

SCOPE

MARKET SHARES LIST OF FIGURES

Market Shares of the Leading Suppliers

Market Shares by Region

North America

Europe, Middle East, Africa

Asia

Latin America

Market Shares by Revenue Category

Hardware

Services

Market Share by Efficiency Class

IE1 - Standard

IE2 - High

IE3 - Premium

IE4 - Super Premium

Direct Current

Market Shares by Power Rating

0.75-2.1kW (1-2.8HP)

2.2-7.4kW (2.9-9.9HP)

7.5-45kW (10-60.3HP)

46-75kW (61.7-100.5HP)

76-110kW (101.9-147.5HP)

111-375kW (148.8-502.8HP)

>376kW (>504.2HP)

Market Shares by End-equipment

Gearbox

Stand-alone

VFD only

VFD plus Gearbox

Market Shares by Frame Type

Market Shares by Hazardous Rating

MARKET FORECAST LIST OF FIGURES

Total Shipments of Low Voltage Motors

Shipments by Region

Shipments by Revenue Category

Shipments by Efficiency Class

Shipments by Power Rating

Shipments by End-equipment

Shipments by Frame Type

Shipments by Hazardous Rating

Shipments by Industry

Automotive

Building Automation

Cement & Glass

Chemical

Electric Power Generation

Electric Power T&D

Electronics & Electrical

Food & Beverage

Machinery Manufacturing

Marine

Metals

Mining

Oil & Gas

Pharmaceutical & Biotech

Plastic & Rubber

Printing & Publishing

Pulp & Paper

Refining

Textiles

Water & Wastewater

Shipments by Machinery Segment

Shipments by Sales Channel

Shipments by Customer Type

KEY SUPPLIERS

A listing of the major suppliers servicing this market are included along with links to their sites.

The World Market for Low Voltage Motors

