

Energy Efficient Motor Market - Global Outlook & Forecast 2022-2027

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Report description:

The global energy efficient motor market is expected to grow at a CAGR of 6.52% during 2022-2027.

MARKET OVERVIEW

Motors are the major energy-consuming equipment across end-user industries, resulting in high energy costs for companies. Owing to the high energy cost associated with motors, several players in end-user industries are focusing on incorporating energy-efficient techniques such as installing energy-efficient motors in their operations. Further, the global energy efficient motor market is highly fragmented, with numerous multinationals and local vendors.

Sales of energy-efficient motors in the APAC area are predicted to develop steadily, owing to increased infrastructure spending and industrial production. Many APAC nations, including China and India, will likely expand and contribute to the energy efficient motor market growth over the forecast period, with significant infrastructure development in the industrial sector and engineering companies. Because of its robust process manufacturing businesses and oil and gas sectors, North America will continue as one of the prominent energy efficient motor markets. However, APAC and Europe remained the top two areas with tremendous potential for demand for energy-efficient motors in different industries, particularly manufacturing.

CHALLENGES IN TERMS OF ECONOMY

The fact that motor buyers frequently have inaccurate perceptions of the expenses associated with vehicle ownership and so do not appropriately account for these expenditures presents a substantial economic hurdle in promoting high- and premium-efficiency motors in the energy efficient motor market. Operating the motor, which accounts for 97-98% of total expenditures, is the most expensive part of motor ownership. The initial cost of acquisition only accounts for about 2-3%. Premium-efficiency motors are more costly than regular motors by 15-25%, or USD 8 - 40 more per horsepower, but they pay for themselves rapidly in operational cost savings.

The payback period for premium motors is usually within the range of 7 months to 4 years on average. However, several

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variables, including yearly hours of usage, energy expenses, installation and downtime costs, and utility rebates' availability, affect the payback period's precise duration.

Although costs play a significant role-including those associated with the purchase, operation, installation, and maintenance, these costs must also be weighed against other aspects like reliability, secondary advantages like less equipment wear or operating noise, and secondary drawbacks like frequency disruptions and declines in mechanical power that can be put to use.

MARKET TRENDS & DRIVERS

INCREASE IN ROBOTICS AND AUTOMATION

-□Robotics is one of the fastest-growing industries globally and is looked at as a replacement for the human race in the labor force. Further, it is witnessing a surge in demand due to its high utility, efficiency, accuracy, and cost-effectiveness. Various industries are looking at robotics and automation as an option to adopt to reduce the costs incurred by the company. For instance, robotics has a lot of scope in industries such as healthcare, agriculture, food preparation, manufacturing, and defense industries.

-□Robotics is also gaining popularity since it is more environmentally viable as it does not require fuel to run and functions on electricity. Given the uncertainty and global volatility, fuel prices have spiked upwards. This is causing manufacturers to look for more energy-efficient ways, and robotics, one of the best options, is expected to see a rise in demand from various industries. So, the increase in the demand for robotics is expected to increase the demand for energy efficient motors, paving the way for the growth of the energy efficient motor market.

INITIATIVES TO CURB THE GREENHOUSE EFFECT BY INDUSTRIES

-□The greenhouse gases and global warming caused due to them pose a significant threat to the entire world. Now, this has become one of the major concerns for many governments. Due to the threats and consequences that global warming is pointing at, governments worldwide are finding and implementing ways to curb the emissions of greenhouse gasses.

-□Industries are major sources of greenhouse gas emissions; thus, various companies are finding ways to curb these emissions. One of the reasons behind these initiatives is the insistence and pressure from various governmental bodies and other concerned organizations. One of the best steps to go energy efficient is switching to energy efficient motors in the energy efficient motor market.

INDUSTRY CHALLENGES

RISE IN COPPER PRICES

-□One of the significant reasons why copper is expensive is that the extraction process of the precious metal is highly cost-intensive, thereby increasing the cost of the metal. Mining is a very heavy investment industry for two reasons. First, mining entails a high upfront capital outlay known as CapEx - the expenditures involved with developing and building open-pit and underground mines. Other company-built infrastructure, including roads, trains, bridges, power plants, and seaports, are frequently present to assist ore and concentrate extraction and shipment. Second, there is an ongoing increase in OPEX, or operating costs, thus hindering the growth of the energy efficient motor market globally.

SEGMENTATION ANALYSIS

INSIGHTS BY EFFICIENCY

IE1, IE2, IE3, and IE4 are included in the updated IEC standard under the low-voltage AC motor segment. Currently, standard efficiency regulations are in place as 'minimum energy efficiency standards (MEPS) in most industrialized economies. This has compared product performance and quality for customers across regions. Selected economies are considering measures that complement MEPS by encouraging the replacement of inefficient motors with efficient ones.

Key factors driving the growth of the global energy efficient motor market are energy savings and resulting costs over

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conventional motors, growing funding from policymakers around the world for energy-efficient motors, increasing need to reduce the greenhouse effect, and the implementation of energy-efficient motors in the manufacturing sector. However, the high cost of premium performance (IE4) motors is the critical limiting factor for its development in the energy efficient motor market.

Segmentation by Efficiency

- IE1
- IE2
- IE3
- IE4

INSIGHTS BY APPLICATION

The global energy efficient motor market by application is segmented into pumps, fans, compressors, and others. Pumps hold the maximum industry share in the application segment and is growing at a CAGR of 7.4% during the forecast period. This segment is driven by the agricultural industry as well as the oil and gas industry. The second highest shareholders by the application are fans. Fans are used in all verticals, be it residential, residential, commercial, or other sectors. The third prominent application is through conveyors; there are used in assembly lines bring to industrial usage and also at airports and other commercial spaces, driving demand from the commercial spaces and more.

Segmentation by Application

- Pumps
- Fans
- Compressors
- Others

INSIGHTS BY END USERS

The global industrial energy efficient motor market was valued at USD 18.75 billion in 2021 and contributed the maximum to the industry by end-user. Motors are majorly used in factories and manufacturing facilities in some or other manner. Electric motors consume more than 53% of the industrial sector of global energy. To curb energy usage and take initiatives toward creating a more sustainable future, the switch to energy-efficient motors can prove beneficial. Similar is the scenario for residential and commercial segments. Almost all the appliances used in the residential segment, such as washing machines, food processors, and more, use motors. Thus switching to energy efficient motors could save so much energy and money by curbing costs. Commercial spaces also use motors extensively, such as ATMs, lifts, elevators, and escalators. There are other segments also, such as agriculture and more.

Segmentation by End-Users

- Industrial
- Commercial
- Residential

GEOGRAPHICAL ANALYSIS

Various countries have shown considerable demand for motors in 2021, while some have a lower requirement for motors due to economic disruptions and slower industrial productivity. Countries such as Germany, the US, the UK, and others have adopted higher-efficiency motors such as IE3 and IE4 AC motors, thereby driving their growth. Investor confidence declined to owe to the COVID-19 pandemic in a majority of countries across the globe. The increase in the number of active cases in the US, the UK,

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India, Brazil, and Italy significantly offset the economy's recovery.

APAC's energy efficient motor market was valued at USD 10.63 billion in 2021 and dominated the global market. With the continuous adoption of industrial automation in APAC, activities such as manufacturing, construction, power generation, and mining are driving the energy efficient motor market in the region. Urbanization and industrialization in emerging countries like India are raising the demand for vehicles, thereby boosting the demand for energy-efficient motors from the automotive industry. Moreover, investments and expansions by vendors in emerging nations in APAC are vital strategies.

North America's energy efficient motor market is growing at a CAGR of 6.78% during the forecast period. Strong emphasis is placed on expanding oil reserves, primarily through discovering unconventional sources, which drives the need for energy-efficient motors while aiding market development. The US accounts for one of the highest shares in the global energy efficient motor market and over one-third of revenues generated by energy efficient motors in North America.

Segmentation by Geography

- North America
 - o□US
 - o□Canada
- Europe
 - o□UK
 - o□Italy
 - o□France
 - o□Spain
 - o□Germany
- APAC
 - o□China
 - o□Australia
 - o□Japan
 - o□South Korea
 - o□India
- Middle East & Africa
 - o□Saudi Arabia
 - o□Turkey
- Latin America
 - o□Brazil
 - o□Mexico

COMPETITIVE LANDSCAPE

Various countries have shown considerable demand for motors in 2021, while some have a lower requirement for motors due to economic disruptions and slower industrial productivity. Countries such as Germany, the US, the UK, and others have adopted higher-efficiency motors such as IE3 and IE4 AC motors, thereby driving their energy efficient motor market growth. Investor confidence declined to owe to the COVID-19 pandemic in a majority of countries across the globe. The increase in the number of active cases in the US, the UK, India, Brazil, and Italy significantly offset the economy's recovery.

Large companies like ABB, Siemens, Johnson Electric, Mitsubishi, and others are all set to explore the global energy efficient motor market. These businesses have a global presence in at least three major geographical areas: North America, APAC, and Europe. However, local vendors are selling goods at low prices with identical requirements.

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The general manufacturing industry relies on multiple countries to procure its raw materials to keep the COGS low and maintain a steady inflow devoid of supply chain disruptions. The situation further deteriorated post-COVID-19, with commercial flights shut and cross-border trade limited to essential commodities. The trade-related issues with China and the US are further anticipated to worsen and impact the energy efficient motor market dynamics. The procurement model of manufacturing companies is thus expected to change to avoid the lack of access to international suppliers.

Key Vendors

- ABB
- CG Power and Industrial Solutions
- Regal Beloit Corporation
- Siemens
- WEG

Other Prominent Vendors

- Brook Crompton
- Bharat Bijlee Limited
- Havells India Limited
- General Electric
- Toshiba International Corporation
- Mitsubishi Electric Corporation
- Laxmi Hydraulics
- NIDEC CORPORATION
- Regal Beloit
- Rockwell Automation
- ebm-papst
- Regal Rexnord Corporation
- Emerson Electric Co.
- Kirloskar Electric Company

KEY QUESTIONS ANSWERED

- 1.□How big is the energy efficient motor market?
- 2.□What is the growth rate of the global energy efficient motor market?
- 3.□Who are the key players in the global energy efficient motor market?
- 4.□What are the rising trends in the energy efficient motor market?
- 5.□What segments are covered in the energy efficient motor market?
- 6.□Which regions hold the most significant energy efficient motor market share globally?

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		Signature	<input type="text"/>

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