

Electric Motor - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Electric Motor Market Analysis

The Electric Motor Market size is estimated at USD 146.40 billion in 2025, and is expected to reach USD 222.02 billion by 2030, at a CAGR of 8.69% during the forecast period (2025-2030).

Growth is anchored in the worldwide push for electrification, stricter minimum-efficiency regulations, and rising demand from electric vehicles, HVAC upgrades, and renewable-energy projects. Tighter IEC efficiency classes, combined with the EU Ecodesign Directive and comparable rules in North America and Asia, are accelerating replacement sales of legacy motors. Simultaneously, sustained expansion of manufacturing in China, India, and Southeast Asia is raising unit volumes in industrial machinery, while IoT-enabled predictive-maintenance platforms shorten replacement cycles. The resulting shift toward IE4 and IE5 designs, permanent-magnet architectures, and integrated drives is heightening R&D competition and driving consolidation among suppliers.

Global Electric Motor Market Trends and Insights

Rapid Electrification of Manufacturing Automation in Asia's Discrete Industries

Robot density in Chinese factories reached 322 units per 10,000 workers in 2024, each robot integrating 6-12 servo motors. Vietnam and India are replicating this automation curve to attract supply-chain diversification, spurring localized demand for

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precision motors with tighter speed-torque envelopes. End users now make procurement choices on lifetime efficiency rather than upfront cost, lifting premium-efficiency unit penetration rates across tier-2 Asian industrial parks. Digital twins for servo-driven cells cut commissioning time and signal an emerging service revenue pool for motor OEMs. As automation migrates to small-batch production, configurability and rapid motor-drive tuning have become decisive buying factors in the electric motor market.

Accelerating HVAC Adoption in US Residential Retrofits Driven by Federal Energy Standards

The latest SEER mandates rendered millions of legacy HVAC systems non-compliant, opening a 15% annual replacement channel through 2027. Variable-speed motors trim residential electricity demand by up to 40%, and cold-climate heat-pump launches in late 2024 expanded viability into northern states. Utilities sweeten the economics with time-of-use tariffs that reward inverter-driven compressors, reinforcing a steady pull for IE4-grade fan and blower motors. Contractors now bundle connected controls that report real-time load profiles, feeding analytics platforms that refine sizing for future retrofits. This regulatory-enabled shift keeps North America firmly on the growth path of the electric motor market.

Volatile Neodymium Prices Pressuring Permanent-Magnet Motor Economics

Neodymium spot prices slid 42% in the past 12 months after earlier spikes, complicating BOM forecasts for traction-motor programs. EV platforms require up to 5 kg of magnet material, so price swings ripple through entire model portfolios. OEMs hedge by dual-sourcing and experimenting with magnet-reduced topologies such as ferrite-assisted synchronous motors. Parallel research on synchronous-reluctance designs offers magnet-free torque maps but demands tight air-gap machining. The uncertainty nudges procurement teams toward long-term offtake contracts, yet sustained volatility could still shave growth from the electric motor market.

Other drivers and restraints analyzed in the detailed report include:

Surging Offshore Wind Turbine Installations Requiring High-Power Permanent-Magnet Motors in Europe / Battery Electric Vehicle Powertrain Ramp-Up in China Catalyzing High-Efficiency Traction Motors Demand / Supply Constraints of IGBT Modules Limiting High-Voltage Motor Production /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

AC units generated 73.34% of global revenue in 2024, and their 9.4% compound growth will keep them central to the electric motor market size narrative through 2030. Induction models remain the default for conveyors, pumps, and fans, while synchronous variants proliferate where speed precision matters. Digital drives now auto-tune rotor flux to squeeze extra kilowatt-hours, making IE4 induction systems a drop-in swap for IE2 legacy fleets. On the DC side, brushless designs extend service intervals in drones and e-bikes, carving defensible niches without threatening overall AC share.

Mature tooling, abundant spare parts, and simplified installation secure AC motors' hold on brownfield retrofits, yet emerging axial-flux topologies hint at fresh competitive stakes. Servo grades feed advanced robotics, fusing feedback encoders with edge computing for millisecond-level motion control. Against this backdrop, the electric motor market continues to reward suppliers that blend scale economics with platform-ready modularity.

Fractional-horsepower units cornered 52% of 2024 shipments as smart appliances, HVAC blowers, and handheld devices multiplied. Tight packaging constraints spur emphasis on miniaturization, with halogen-free insulation films and powder-metal gears lifting thermal limits. In contrast, >500 HP machines will post an 8% CAGR, creating an outsized revenue impact despite

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modest volumes. Large-frame permanent-magnet motors now propel 14-MW offshore wind nacelles, while mining conveyors demand rugged TEFC housings rated for desert climates.

Integral-horsepower brackets (1-500 HP) remain the backbone of process lines, benefitting from variable-frequency drives that unlock 20-30% energy savings. As OEMs broaden their IE4 catalogs, segment crossover formats blur, blending compact stator geometries of small motors with the cooling strategies of their high-power cousins. All told, divergent growth dynamics within power classes reinforce the complexity of sizing opportunities across the electric motor market.

The Electric Motor Market Report is Segmented by Motor Type (DC Motor, AC Motor, and Others), Output Power Rating (Fractional Horsepower, and Others), Voltage (Low Voltage, Medium Voltage, and High Voltage), Application (Industrial Machinery, HVAC and Refrigeration, and Others), End-Use Industry (Residential, Commercial, and Industrial), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa).

Geography Analysis

Asia-Pacific led with 42.6% of 2024 revenue and will clock a 10.7% CAGR to 2030 as China maintains volume leadership and India accelerates Make-in-India initiatives. Guangdong-based motor clusters integrate end-to-end casting, winding, and drive electronics, compressing lead times for domestic EV customers. Vietnam's industrial parks lure contract manufacturers that back-source motors to regional suppliers, widening supply webs. Government incentives on high-efficiency equipment encourage swift adoption of IE4 grades across textile and semiconductor fabs.

North America holds the second-largest stake, energized by federal HVAC efficiency laws and a vibrant automation ecosystem. Predictive-maintenance retrofits in Midwest auto plants cut downtime by up to 45%, nudging continuous replacement orders. The US battery-plant build-out funnels traction-motor R&D spend into joint labs that test rotor laminations under high-speed duty cycles. Canada's on-shore wind repowering schemes shift procurement toward lighter direct-drive units, enriching the electric motor market.

Europe sustains growth on dual pillars of offshore wind and stringent Ecodesign rules. Ports on the North Sea expand nacelle staging capacity to manage 15-MW turbines outfitted with direct-drive PM generators. Manufacturers centralize service hubs in Poland and Spain to satisfy 5-year overhaul contracts. EU energy-price volatility pushes industrial users to prioritise IE4 retrofits, shortening payback horizons.

The Middle East and Africa, though smaller in absolute terms, post above-trend growth from water-desalination plants and gas booster stations. UAE EPC contracts specify explosion-proof motors with IECEx certification, creating pockets of high-margin demand. South America's industrial restarts in Brazil and Chile reignite orders for medium-voltage pump drives and sugar-mill crushers. Across all regions, regulatory convergence on efficiency keeps demand momentum intact for the electric motor market.

List of Companies Covered in this Report:

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Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Recent Trends & Developments

4.3 Market Drivers

4.3.1 Rapid Electrification of Manufacturing Automation in Asia's Discrete Industries

4.3.2 Accelerating HVAC Adoption in US Residential Retrofits Driven by Federal Energy Standards

4.3.3 Surging Offshore Wind Turbine Installations Requiring High-Power Permanent-Magnet Motors in Europe

4.3.4 Battery Electric Vehicle Powertrain Ramp-Up in China Catalyzing High-Efficiency Traction Motors Demand

4.3.5 Industrial IoT-Enabled Predictive Maintenance Boosting Replacement of Aging Motors in North America

4.3.6 Government Mandates on MEPS Propelling IE4 & IE5 Motor Sales Globally

4.4 Market Restraints

4.4.1 Volatile Neodymium Prices Pressuring Permanent-Magnet Motor Economics

4.4.2 Supply Constraints of IGBT Modules Limiting High-Voltage Motor Production

4.4.3 Lengthy Certification Cycles for Explosion-Proof Motors in Middle-East Oil & Gas

4.4.4 Growing Adoption of Integrated Servo Drives Reducing Stand-Alone Motor Revenue Opportunities

4.5 Supply-Chain Analysis

4.6 Regulatory Outlook

4.7 Technological Outlook

4.8 Porter's Five Forces

4.8.1 Bargaining Power of Suppliers

4.8.2 Bargaining Power of Buyers

4.8.3 Threat of New Entrants

4.8.4 Threat of Substitute Products

4.8.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Motor Type

5.1.1 AC Motor (Induction (Asynchronous), Synchronous)

5.1.2 DC Motor (Brushed, Brushless (BLDC))

5.1.3 Others (Hermetic Motor, Stepper Motor)

5.2 By Output Power Rating

5.2.1 Fractional Horsepower (Below 1 HP)

5.2.2 Integral Horsepower (1 to 500 HP)

5.2.3 High-Power (Above 500 HP)

5.3 By Voltage

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- 5.3.1 Low Voltage (Below 1 kV)
- 5.3.2 Medium Voltage (1 to 6 kV)
- 5.3.3 High Voltage (Above 6 kV)
- 5.4 By Application
 - 5.4.1 Industrial Machinery
 - 5.4.2 HVAC and Refrigeration
 - 5.4.3 Automotive and Transportation
 - 5.4.4 Residential Appliances
 - 5.4.5 Utilities and Energy
 - 5.4.6 Others (Agriculture, Oil and Gas, Mining)
- 5.5 By End-Use Industry
 - 5.5.1 Residential
 - 5.5.2 Commercial
 - 5.5.3 Industrial
- 5.6 By Geography
 - 5.6.1 North America
 - 5.6.1.1 United States
 - 5.6.1.2 Canada
 - 5.6.1.3 Mexico
 - 5.6.2 Europe
 - 5.6.2.1 United Kingdom
 - 5.6.2.2 Germany
 - 5.6.2.3 France
 - 5.6.2.4 Spain
 - 5.6.2.5 Nordic Countries
 - 5.6.2.6 Russia
 - 5.6.2.7 Rest of Europe
 - 5.6.3 Asia-Pacific
 - 5.6.3.1 China
 - 5.6.3.2 India
 - 5.6.3.3 Japan
 - 5.6.3.4 South Korea
 - 5.6.3.5 Malaysia
 - 5.6.3.6 Thailand
 - 5.6.3.7 Indonesia
 - 5.6.3.8 Vietnam
 - 5.6.3.9 Australia
 - 5.6.3.10 Rest of Asia-Pacific
 - 5.6.4 South America
 - 5.6.4.1 Brazil
 - 5.6.4.2 Argentina
 - 5.6.4.3 Colombia
 - 5.6.4.4 Rest of South America
 - 5.6.5 Middle East and Africa
 - 5.6.5.1 United Arab Emirates
 - 5.6.5.2 Saudi Arabia
 - 5.6.5.3 South Africa

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5.6.5.4 Egypt

5.6.5.5 Rest of Middle East and Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves (M&A, Partnerships, PPAs)

6.3 Market Share Analysis (Market Rank/Share for key companies)

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Products & Services, and Recent Developments)

6.4.1 ABB Ltd.

6.4.2 Siemens AG

6.4.3 Nidec Corporation

6.4.4 Regal Rexnord Corporation

6.4.5 WEG S.A.

6.4.6 Toshiba Corporation

6.4.7 Hitachi Ltd.

6.4.8 Rockwell Automation, Inc.

6.4.9 AMETEK, Inc.

6.4.10 Johnson Electric Holdings Ltd.

6.4.11 TECO Electric & Machinery Co., Ltd.

6.4.12 Mitsubishi Electric Corporation

6.4.13 Baldor Electric Company

6.4.14 Brook Crompton Holdings Ltd.

6.4.15 Anhui Wannan Electric Machine Co., Ltd.

6.4.16 Kirloskar Electric Company Ltd.

6.4.17 Hyosung Heavy Industries

6.4.18 Danaher Motion (Kollmorgen)

6.4.19 Yaskawa Electric Corporation

6.4.20 Fuji Electric Co., Ltd.

6.4.21 Robert Bosch GmbH

6.4.22 Schneider Electric SE

6.4.23 SEW-Eurodrive GmbH & Co. KG

6.4.24 Emerson Electric Co.

7 Market Opportunities & Future Outlook

7.1 White-Space & Unmet-Need Assessment

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