Global economic slowdown and political issues across countries which discouraged machinery production investment activities, led to the motion control market being affected by reduced demand from various end markets for automation products, in particular robotics, electronics assembly, and machine tools. The outbreak of COVID-19 increased the loss again for manufacturers in 2020.

Jessica Nian
Analyst
Motion Controls Report

Part of the Electric Motor Systems Service Area Package

HOW OMDIA HELPS YOU

- Size the markets for GMC market and CNC market
- Identify driving factors and opportunities of industries
- Understand the latest trends for motion controls market
- Leverage surveys and forecasts to better understand this segment and your customers
- Analyze the market share of leading industry players

KEY QUESTIONS ADDRESSED

- What are the size, share, and forecasts for GMC motion controls (GMC servo motor, GMC servo drives, and GMC position control hardware)?
- What are the size, share and forecast for CNC motion controls (CNC servo motor, CNC servo drives, CNCs)?
- What are the opportunities of end-user’s industries?
- What are the trends of future technical changes?
- Who are the main market players of motion controls market for each product / region?

The market for motion control products by product type: World

Revenues ($ millions)

Data issued: July 2020

Source: Omdia © 2020 Omdia
Motion Controls: Our Expert Analyst

Jessica Nian
Analyst
Motion Controls: Research Coverage

MEASURES
- Revenues
- Shipments
- ASPs
- Market shares
- Key trend analysis

PRODUCTS COVERED
- GMC Servo Motors
- GMC Servo Drives
- GMC Position Control Hardware
- GMC Software & Services
- CNC Servo Motors
- CNC Servo Drives
- CNCs
- CNC Software & Services

SALES CHANNEL
- Direct to Machine Builder
- Direct to End-user
- Direct to Systems Integrator
- Via Distribution

INDUSTRY SECTOR
- GMC Servo Motors, GMC Servo Drives, GMC Position Control Hardware, CNC Products

Discrete Industries
- Electronics & Electronics Assembly
- Food, Beverage & Tobacco Machinery
- Machine Tools - Metal Cutting
- Machine Tools - Metal Forming
- Materials Handling Machinery
- Material Transformation Machinery
- Medical & Scientific Equipment
- Packaging & Labeling Machinery
- Paper & Paperboard Machinery
- Printing Machinery
- PV Manufacturing Equipment
- Robotics
- Rubber & Plastics Machinery
- Semiconductor Machinery
- Textile Machinery
- Woodworking Machinery
- Other Discrete Industries

Process Industries
- Power Generation - Renewable
- Other Process Industries
- Other Industries

REGIONS
- GMC Servo Motors, GMC Servo Drives, GMC Position Control Hardware, CNC Products

EMEA
- Africa
- Austria & Switzerland
- Benelux
- Central & Eastern Europe
- France
- Germany
- Italy
- Middle East
- Nordic Countries
- Poland
- Russian Fed. & CIS
- Spain & Portugal
- Turkey
- UK & Ireland

Americas
- Brazil
- Canada
- Mexico
- United States
- Rest of Americas

Asia Pacific
- China
- India
- Oceania
- South Korea
- Taiwan
- Rest of Asia
- Japan
TECHNICAL DATA

Servo Motors

Motor Type
- AC Induction Servo
- AC Brushless Servo
- DC Brushed Servo
- Direct Drive Servo (Torque)
- Drive Integrated Servo
- Linear Servo

Continuous Torque
- <0.2Nm (<1.8lb-in)
- 0.2 - 2Nm (1.8 - 18lb-in)
- 2.1 - 5Nm (19 - 45lb-in)
- 5.1 - 8Nm (46 - 70lb-in)
- 8.1 - 15Nm (71 - 132lb-in)
- 15.1 - 25Nm (133 - 220lb-in)
- 25.1 - 100Nm (221 - 890lb-in)
- >100Nm (>890lb-in)

Feedback Device Capability
- Resolver
- Incremental
- Single-turn Absolute
- Multi-turn Absolute

Servo Drives

Level of Customization
- Standard Part
- Customized Product

Voltage
- <100V
- 100V - 120V
- 200V - 240V
- 380V - 500V
- 525V - 600V
- >690V

Power
- 0 - 49W
- 50 - 100W
- 101 - 400W
- 401 - 1kW
- 1.1 - 3.7kW
- 3.8 - 7.5kW
- 7.6 - 20kW
- 21 - 55kW
- 56 - 75kW
- >75kW

Position Control Hardware

Type
- PLC-based Module
- Stand Alone Unit
- PC-based Module
- Drive-based Module
- CNCs

Networking
- Fieldbus
- Ethernet

Level of Integrated Intelligence
- Drive Only (None) with P/D or Analog Input
- Drive Only (None) with Networking
- Drive + Position Control (PC) with P/D or Analog Input
- Drive + Position Control (PC) with Networking
- Drive + PC + Sequential (PLC)

Level of Input Current
- AC Input
- DC (via common bus)

Networking
- Fieldbus
- Ethernet

Level of Integrated Intelligence
- Drive Only (None) with P/D or Analog Input
- Drive Only (None) with Networking
- Drive + Position Control (PC) with P/D or Analog Input
- Drive + Position Control (PC) with Networking
- Drive + PC + Sequential (PLC)
About Omdia’s Manufacturing Research

Omdia’s Manufacturing Technology research group consists of reports that provide its customers with reliable market intelligence on a broad scope of industrial automation equipment. As a major contributor to global electricity consumption, automation equipment manufacturers are now having to adapt to a more energy efficient and connected world. As the hardware covered by the Manufacturing Technology group continues to become commoditized, Omdia looks to present the story of how manufacturers are altering their business models in order to offer unique services and solutions.

This portfolio of Omdia’s Manufacturing vertical aims to continue to provide a consistent view of these mature markets while exploring the technological trends brought on by an inevitable shift toward more digital strategies. As more end users embrace the benefits that can be attained through the Industrial Internet of Things, Omdia will continue to track the growth of connected equipment and how this will affect the competitive landscape of the manufacturing technology environment.
Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

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**96%**

of our customers rate our service as Excellent or Very Good

Tom Coate  
Customer Success Manager

Kären Dyer  
Customer Success Manager

96% of our customers rate our service as Excellent or Very Good
ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today’s constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.