Low Voltage Drives
Intelligence Service

2022/23 Prospectus
Introduction

Stay on top of market disruptions and transitions with this one-stop information source for drive suppliers and other industry players. For over 20 years, OMDIA coverage of motor drives has provided customers the ability to monitor and analyze important trends, gauge market shifts and make informed business decisions.

Benefits

- Subscribers are able to make strategic planning decisions earlier in year
- All deliverables published on a customer specific portal at https://omdia.tech.informa.com/
- Gain insight into the most important industries, countries and market segments with access to regional data and topline reports based on customer feedback.

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualitative analysis</td>
<td>Mid-year Update (BY 2020)</td>
<td>Mid-year Update (BY 2021)</td>
</tr>
<tr>
<td>Data</td>
<td>Core report (BY 2021)</td>
<td></td>
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<tr>
<td>Topline reports</td>
<td>Topline #2</td>
<td>Topline #3</td>
</tr>
</tbody>
</table>

- **Topline #2** LV drives in food and beverages sector - Feb 2022
- **Topline #3** LV drives in Germany and Italy - April 2022
- **Topline #1** Low Voltage Drives Report - China - Oct 2022
- **Topline #2** Regenerative and Low-Harmonic Drives Report - Jan 2023
- **Topline #3** Low Voltage Drives Software and Services Report April 2023
Omdia has taken primary and secondary approach in our research methodology

Primary data collection via questionnaires completed from major market suppliers as well as face-to-face and telephone discussions
Secondary research to extend product and company knowledge
Service components

Deliverables

Data
- Global
- EMEA
- Americas
- Asia Pacific
- Japan

Qualitative Analysis
- Core report
- Mid-year update
- Topline reports x3
- Analyst insights
- Analyst Support
- Access to dedicated drives expert

Coverage

For all segmentations
- Historic base year: 2020
- Base year: 2021
- Forecasts: 2022 - 2026
- Revenues (by point of sale)
- Unit shipments
- Average selling prices

Topline Reports
1. Low Voltage Drives Report - China - 2022
2. Regenerative and Low-Harmonics Drives Report - 2022
3. Software and services in low-voltage drives market - 2023
## Global Data Segmentations

### Regional Data Detail

<table>
<thead>
<tr>
<th>Voltage</th>
<th>Direct to End-User</th>
<th>Distribution to End-User</th>
<th>Direct to Machine Builder</th>
<th>Distribution to Machine Builder</th>
<th>Direct to Systems Integrator</th>
<th>Distribution to Systems Integrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>100V to 120V</td>
<td></td>
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<tr>
<td>200V to 240V</td>
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<tr>
<td>380V to 500V</td>
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<tr>
<td>525V to 600V</td>
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<tr>
<td>690V</td>
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</tbody>
</table>

### Motor Control

<table>
<thead>
<tr>
<th>Induction-Only</th>
<th>Multi-mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Loop</td>
<td>Open Loop</td>
</tr>
<tr>
<td>Closed Loop Vector</td>
<td>Closed Loop Vector</td>
</tr>
</tbody>
</table>

### IP Rating

<table>
<thead>
<tr>
<th>IP Rating</th>
<th>Networking Technology</th>
<th>Form Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP 2X</td>
<td>Fieldbus</td>
<td>Board-Level Drives</td>
</tr>
<tr>
<td>IP 3X</td>
<td>Ethernet</td>
<td>Standalone Drives</td>
</tr>
<tr>
<td>IP 00</td>
<td>Wireless</td>
<td>Packaged Drives</td>
</tr>
<tr>
<td>IP 5X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Sales Channel

- Direct to End-User
- Distribution to End-User
- Direct to Machine Builder
- Distribution to Machine Builder
- Direct to Systems Integrator
- Distribution to Systems Integrator

## Low Voltage Drives Product Data Detail

### Region

**EMEA**
- Germany
- Italy
- Middle East
- Nordic Countries
- Poland
- Russia & CIS
- Spain & Portugal
- Turkey
- UK & Ireland

**AMERICAS**
- Brazil
- Canada
- Mexico
- Rest of Latin-America
- United States

**APAC**
- China
- India
- Oceania
- South Korea
- Taiwan
- Thailand
- Rest of Asia

### Industry Sector

**Discrete Industries**
- Automotive
- Commercial HVAC
- Conveyors
- Cranes and Hoists
- Elevators and Escalators
- Food and beverage machinery
- Machine Tools
- Marine
- Materials handling equipment
- Mining
- Packaging machinery
- Printing machinery
- Pulp and paper machinery
- PV manufacturing equipment
- Refrigeration
- Robotics
- Rubber and plastics machinery
- Semiconductor machinery
- Textile machinery
- Woodworking machinery
- Other machinery

**Process Industries**
- Cement, glass and ceramics
- Chemicals
- Food and beverage
- Metal Processing
- Mining
- Oil and gas
- Pharmaceuticals
- Power Generation - Fossil
- Power Generation - Nuclear
- Power Generation - Renewables
- Pulp and paper
- Refining
- Rubber and Plastics
- Water and Wastewater
- Other Process Sectors

**Other Manufacturing Sectors**
- Building Automation
- Infrastructure
- Other
Topline 2: Regenerative and Low-Harmonic Drives Report

**Product types**

**Regenerative drives**
- Active Front End (AFE) AC Drives
- Active Front End (AFE) DC Bus supply
- Fundamental Front End (AFE) AC Drives
- Fundamental Front End (AFE) DC Bus supply

**Low Harmonics drives**
- Active Front End
- Multi-pulse solution
- Drive integrated
- Active harmonic filter
- Passive harmonic filter

**Process Manufacturing Sector**
- Chemicals
- Food, Beverage, & Tobacco
- Metal Processing
- Mining
- Oil & Gas
- Pharmaceuticals
- Power Generation (Fossil)
- Power Generation (Nuclear)
- Power Generation (Renewable)
- Rubber & Plastics
- Water & Wastewater
- Other Process

**Discrete Manufacturing**
- Automotive
- Commercial HVAC
- Conveyors
- Cranes & Hoists
- Elevators & Escalators
- Food, Beverage, & Tobacco
- Machine Tools
- Mining
- Packaging & Labeling
- Paper & Paperboard
- Printing
- Refrigeration
- Robotics
- Rubber & Plastics
- Semiconductors
- Shipbuilding & marine
- Textiles
- Woodworking
- Other Discrete

**Other Manufacturing Sectors**
- Building Automation
- Infrastructure
- Others

**Cooling method**
- Air cooled
- Liquid cooled

**Power Rating**
- <2.2kW (<3HP)
- 2.2 – 7.4kW (3 – 9.9HP)
- 7.5 – 22kW (10 – 29HP)
- 23 – 75kW (30 – 100HP)
- 76 – 110kW (101 – 140HP)
- 111 – 250kW (141 – 335HP)
- 251 – 500kW (336 – 700HP)
- >500kW (>700HP)

**Sales channels**
- End user
- Machine builder
- System integrator
- Distributor

**Supplier market shares**
(with at least 2% market share)

**EMEA**

**Americas**

**Asia and Oceania (exclude Japan)**

**Japan**
Research scope

Services by major region
- Commissioning
- Software subscriptions
- Post-starup training
- Onsite support and maintenance
- Remote support and maintenance
- Auditing and energy efficiency
- Upgrading
- Decommissioning

Europe
Middle East and Africa (MEA)
The US and Canada
Latin America
China
Japan
Rest of Asia Pacific

Purchase method
- Ad hoc services
- Extended warranty

Sales channels
- End user
- Machine builder
- System integrator
- Distributor

Supplier market shares
(with at least 2% market share)
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