

Low Voltage Drives Intelligence Service

2022/23 Prospectus

askananalyst@omdia.com

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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.

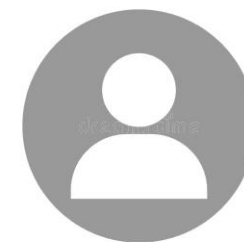
Benefits

- 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.

	2022												2023			
Deliverables	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Qualitative analysis		Mid-year Update (BY 2020)					Core report (BY 2021)							Mid-year Update (BY 2021)		
Data																
Topline reports		Topline #2		Topline #3						Topline #1			Topline #2			Topline #3

	2022						2023					
Topline #2	LV drives in food and beverages sector - Feb 2022						Topline #1 Low Voltage Drives Report - China- Oct 2022					
Topline #3	LV drives in Germany and Italy - April 2022						Topline #2 Regenerative and Low-Harmonic Drives Report - Jan 2023					
							Topline #3 Low Voltage Drives Software and Services Report April 2023					

LEAD ANALYST



RACHEL SEE

Research Analyst
Electric motor systems

Rachel.See@omdia.com

Secondary point of contact



Joanne Goh

Research Manager
Electric motor systems

Joanne.Goh@omdia.com

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		LOW VOLTAGE DRIVES PRODUCT DATA DETAIL				
Voltage	EMEA		AMERICAS		APAC	JAPAN
	100V to 120V 200V to 240V 380V to 500V 525V to 600V 690V	Africa Austria & Switzerland Benelux Central & E. Europe France	Germany Italy Middle East Nordic Countries Poland	Russia & CIS Spain & Portugal Turkey UK & Ireland	Brazil Canada Mexico Rest of Latin-America United States	China India Oceania
Motor Control	POWER RATING		INDUSTRY SECTOR			
Induction-Only Open Loop Closed Loop Vector	Multi-mode Open Loop Closed Loop Vector	Single Phase 0.1 – 0.75 kW (0.1 – 1HP) 0.76 – 2.2kW (1 – 3HP) >2.2kW (>3hP)	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		
IP Rating	Networking Technology	Three Phase	FORM FACTOR			
IP 2X IP 6X IP 3X IP 00 IP 5X	Fieldbus Ethernet Wireless	<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)	Board-Level Drives Standalone Drives Packaged Drives			
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					

Topline 1: Low Voltage Drives Report - China- 2022 (Sept/Oct)

China Data by Product Type

Compact AC Drives

Standard AC Drives

Premium AC Drives

DC Drives

Form Factor

- Board-Level Drives
- Standalone Drives
- Packaged Drives

Supplier Market Shares

(with at least 2% market share)

Power Rating

Single Phase

- 0.1 – 0.75 kW (0.1 – 1HP)
- 0.76 – 2.2kW (1 – 3HP)
- >2.2kW (>3hP)

Three Phase

- <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)

Industry Sector

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

Topline 2: Regenerative and Low-Harmonic Drives Report



EMEA

Americas

Asia and Oceania
(exclude Japan)

Japan

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

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

Process Manufacturing Sector

- Chemicals
- Food, Beverage, & Tobacco
- Metal Processing
- Mining
- Oil & Gas
- Pharmaceuticals
- Power Generation (Fossil)
- Power Generation (Nuclear)
- Power Generation (Renewable)
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Discrete Manufacturing

- Automotive
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- Other Discrete

Other Manufacturing Sectors

- Building Automation
- Infrastructure
- Others

Cooling method

- Air cooled
- Liquid cooled

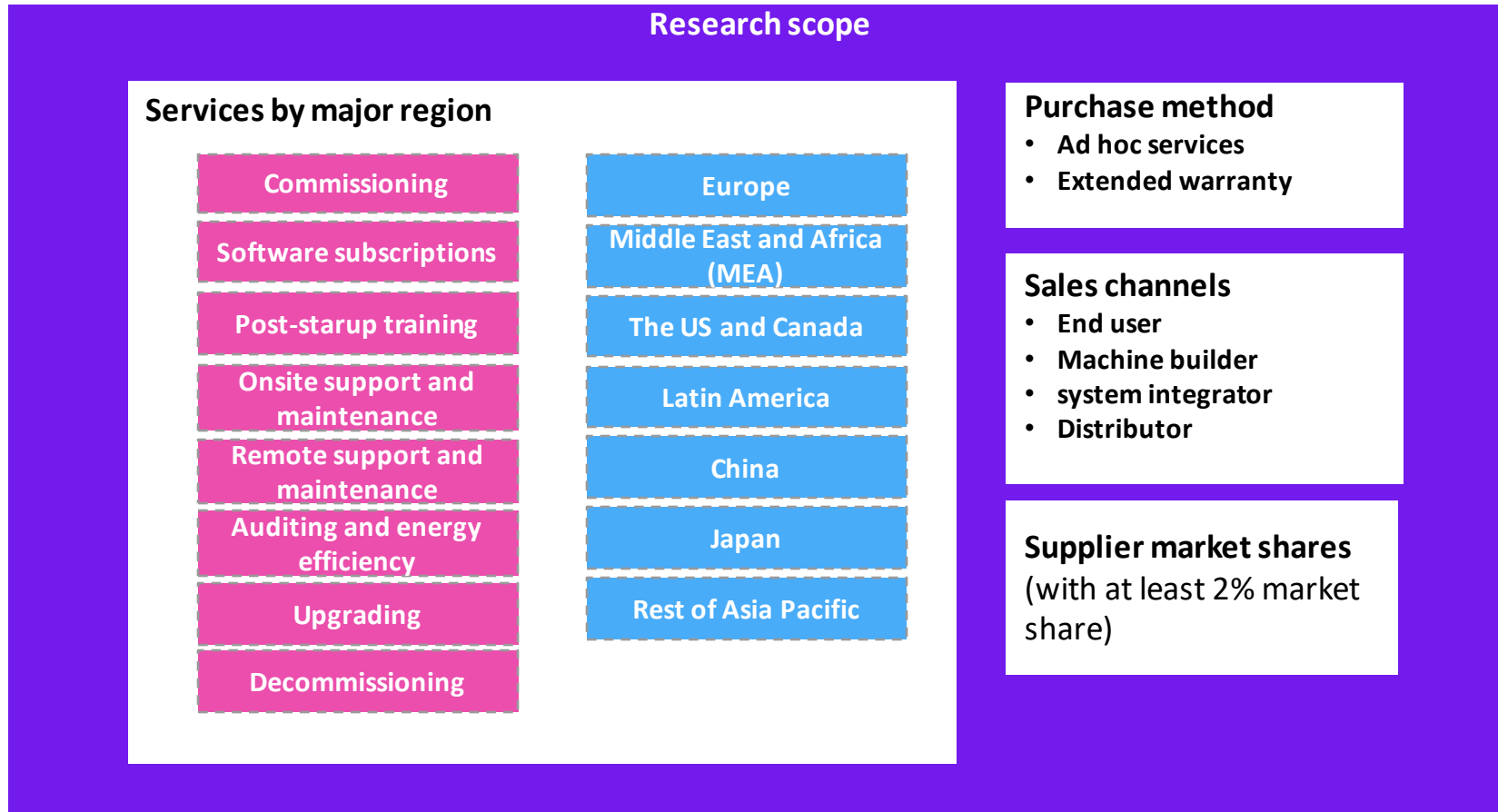
Power Rating

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- 111 – 250kW (141 – 335HP)
- 251 – 500kW (336 – 700HP)
- >500kW (>700HP)

Sales channels

- End user
- Machine builder
- system integrator
- Distributor

Topline 3: Low Voltage Drives Software and Services Report – 2023 (April)



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Get in touch

Americas

E: customersuccess@omdia.com

08:00 – 18:00 GMT -5

Europe, Middle East & Africa

E: customersuccess@omdia.com

8:00 – 18:00 GMT

Asia Pacific

E: customersuccess@omdia.com

08:00 – 18:00 GMT + 8