

Motion Controls Report - 2025

**Part of the Electric Motor Systems Service Area
Coverage**

Monitor and analyze important trends, gauge market shifts
and make informed business decisions.



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The motion control market faces a turbulent 2025 and beyond, with:

Tariff Introductions



Ongoing tariff introductions and concerns over trade wars

Investment Slowdown



A slowdown in the green transition and regional investment in projects such as battery and solar photovoltaic manufacturing

Tech Developments



Ongoing technology developments such as software defined automation and AI

This report identifies the outlook from both a market and technological perspective.

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Who Is This Product For?

Strategy, Product, Marketing and Commercial teams working within:

- Motion control vendors
- Robot Manufacturers
- Semiconductor companies
- Manufacturers

How Does Omdia Help You?

- Identify and assess new market opportunities
- Define market needs and set customer-centric product roadmaps and go-to-market strategies
- Uncover product and industry specific competitive advantages
- Decide which technologies to invest in and who to partner with to achieve growth ambitions

Key Questions Answered?

- How is the motion control market performing, coming out of a challenging 2024?
- What impact will trade tensions and tariffs have on the market development
- How is the competitive environment evolving with the growing presence of Chinese motion control vendors?
- What opportunities are there for AI and software defined automation in the motion control sector
- Which regions and industry sectors offer the best growth opportunities over the next year?
- Which companies have gained / lost market share between 2023 and 2024?

Motion Controls: Our Expert Analyst

Alex has led research and managed teams across the manufacturing technology division, most recently he having led its Sustainable Factory practice and prior to this its Digital Factory research.

Over his 25 years as an analyst, covering discrete and process automation and machinery markets, he has helped customers understand the potential of the technology markets and perform voice-of-the-customer analyses.

Alex has analyzed competitive environments, business models, technology trends, and end user requirements.

He has consulted on the best practices for implementing IIoT, supported go-to-market strategies, and created market positioning content. He is a regular keynote speaker at industry events, tradeshow, and conferences worldwide.



Alex West

*Senior Principal
Analyst*

**Manufacturing
Technology**

Motion Control Report – 2025: Deliverables

Core deliverables



Databases

Base year market data and five-year forecasts, delivered annually in Excel and in TRAX®, an online analysis tool.



High-Quality Insights Reports

Topline reports addressing key areas, market size and industry analysis.



Analyst Insights & Access

Regular ongoing expert commentary and direct access to analysts for real-time responses to critical questions and tailored guidance.

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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
- Independent Cart Technology
- CNC Servo

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
- ICT
- Medical & Scientific Equipment
- Packaging & Labelling Machinery
- Paper & Paperboard Machinery
- Printing Machinery
- PV Manufacturing Equipment
- Robotics
- Rubber & Plastics Machinery
- Semiconductor Machinery
- Textile Machinery
- Woodworking Machinery
- Other Discrete Industries

Discrete Industries

- Automotive
- Battery manufacturing
- Electronics & Electronics Assembly
- Discrete Automotive
- Food, Beverage & Tobacco Machinery
- Machine Tools - Metal Cutting
- Machine Tools - Metal Forming
- Materials Handling Machinery
- Material Transformation Machinery

Process Industries

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

Regions

EMEA

- Austria
- Benelux
- Denmark
- Finland
- France
- Germany
- Ireland
- Italy
- Norway
- Portugal
- Spain
- Sweden
- Switzerland
- UK
- Rest of Western Europe
- Poland
- Russia Federation
- Rest of Eastern Europe
- Israel

- Turkey
- Rest of Middle East
- Africa

AMERICAS

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

ASIA PACIFIC

- China
- India
- Vietnam
- Malaysia
- Oceania
- South Korea
- Taiwan
- Rest of Asia
- Japan

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Technical Data - Servo Motors

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

Technical Data - Servo Drives

Servo Drives 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

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)

Control Hardware

Type

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

We think with you, not at you.

Our clients enjoy **direct access to our analysts.**

Through open dialogue, we help you navigate your competitive landscape, shape your go to market strategies, and open new paths forward.

Access to expertise



Support for your most pressing questions

3,800+ “Ask An Analyst” hours annually



Seamless engagement and client success

100+ account and customer success team



Decades of experience

Across Channel, Consumer, Integrated Tech, Enterprise and Telecoms



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