

**Global Summary Report
Market for
Industrial Motors
2012 ~ 2020**

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1. INTRODUCTION

1.1 OBJECTIVES AND SCOPE

The objective of this report is to provide a concise overview of the world market for industrial electric motors. The report gives an estimate of the value of industrial electric motor consumption in each national market, broken down by product type. The data given are 2005-2009 actual market values and estimated 2010 ~ 2015 market values.

For the purposes of this report the following categories of industrial electric motors have been used :

- DC Motors >0.75kW
- AC Motors (0.75kW to 375kW)
- AC Motors (376kW to 750kW)
- AC Motors (>750kW)

These categories include all industrial electric motors of an output greater than one horsepower (equivalent to 0.75kW), both single and multi-phase. Traction motors and special motors used in civil aircraft are not included in this report.

The scope for this report is worldwide - that is, every country having a significant industrial motor customer base. The report is designed to be used as a first line planning tool by companies interested in the global market for industrial motors and their products, and as a base from which to identify national markets worthy of further investigation.

The report's sister publications, 'The World Market for Industrial Generators, 2008 ~2015' and 'Directory of Industrial Motor and Generator Manufacturers 2010', provide respectively a similar outlook of the world market for industrial generators and a comprehensive global directory of the world's manufacturers and suppliers of industrial motors and generators.

1.2 METHODOLOGY

Data in the markets report are presented in US dollars.

The survey was based primarily on desk research, including a review of available published production and trade statistics. Import and export figures are calculated from national and United Nations' figures for 2008 to 2012 - the most comprehensive and up-to-date statistics available. Market values are assumed to be equal to Production + (Imports - Exports). National production estimates are based on statistics provided by national governments and trade associations. They are also derived from an analysis of the size and location of known production plants. Market sizes for 2013 ~15 and on to 2020 are estimated by analysing the pattern of market size growth over the period 2008-2012 and from earlier reports going back before 2008.

Market values are at factory gate prices - they reflect the prices for the products by the importer and do not include trade mark-ups and installation costs. It should be noted that published classifications of products, especially with respect to trade statistics, are sometimes inaccurate, as products may be shipped under generic titles. It should also be noted that Goulden Reports chronicles shipments rather than contracts. A contract to supply goods over a number of years will not appear as a one-off event in a Goulden Report, but rather will be recorded from the trade statistics. The nature of the market means that demand within countries, especially developing ones, can fluctuate greatly from year to year as purchases are often made on a one-off basis rather than spread evenly over a number of years.

Within national markets, where published figures were unavailable to us, the breakdown between different product categories uses intelligence based on the pattern of consumption in the country concerned. In these cases the breakdown is made from an estimate of the total market size rather than the value of the entire market being calculated from the individual product categories.

Figures for non-UN countries are based on data obtained from individual countries and are consequently not necessarily comparable with UN-derived information. Clearly the report is only as accurate as the information upon which it draws - the sources are regarded as being the best and most comprehensive available.

Data in this report will vary from those printed in previous issues. These differences are due principally to improvements in the quality of official data sources.

Columns may not always add to the absolute totals given in the tables, this is due to rounding.