



Low Voltage Motors & Drives Global Market Update

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Presentation Overview



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- Research Methodology Description
- Global Market Updates
 - Low Voltage Motors
 - Low Voltage Motor Drives
- Questions

Research Methodology Description



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Base Year Data: Primary Research

- Collect sales revenues and unit shipments from leading suppliers to each product market via Excel-based questionnaires: high participation rates
- Supplement data collection with extensive interviews with strategic marketing and product management personnel
- Consult with leading industry trade, distributor and end-user associations
- Consider data from multiple quarterly trackers: Drives, PLCs, etc.

Forecasting: Primary & Secondary Research

- Economic forecasts (GDP) sourced from IMF
- Machinery Production (MP) forecasts are sourced from IMS Research's annual Worldwide Machinery Production Yearbook study
- Interviews provide insight into which market segments will outperform or underperform in the future

The World Market for Low Voltage Motors



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Products Covered:

- IE1 (Standard Efficiency)
 - Eff2 and below; Below EPAct
- IE2 (High Efficiency)
 - Eff1; EPAct
- IE3 (Premium Efficiency)
 - Above Eff1; NEMA Premium
- IE4 (Super Premium Efficiency)
 - Much higher than Eff1; Above NEMA Premium
- Other Non-classified
 - 8 / 10 / 12 pole motors
 - >375kW
 - Submersible motors
 - Fire pump motors
 - All motors that fall outside NEMA and/or IEC
- DC Motors



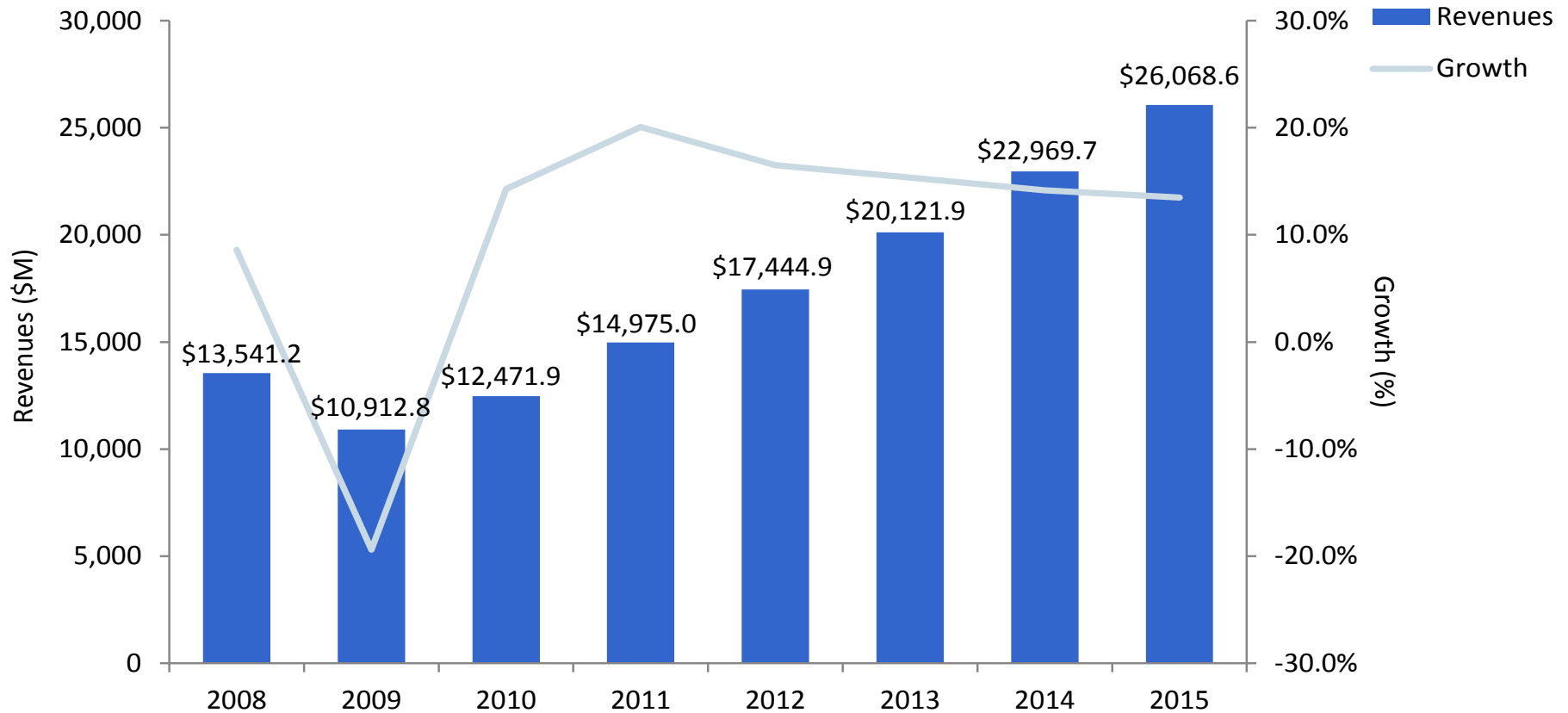


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Low Voltage Motors – Market Data

Low Voltage Motors Market
Market Size (\$M) and Growth



≈ 49 million low voltage motors shipped in 2011

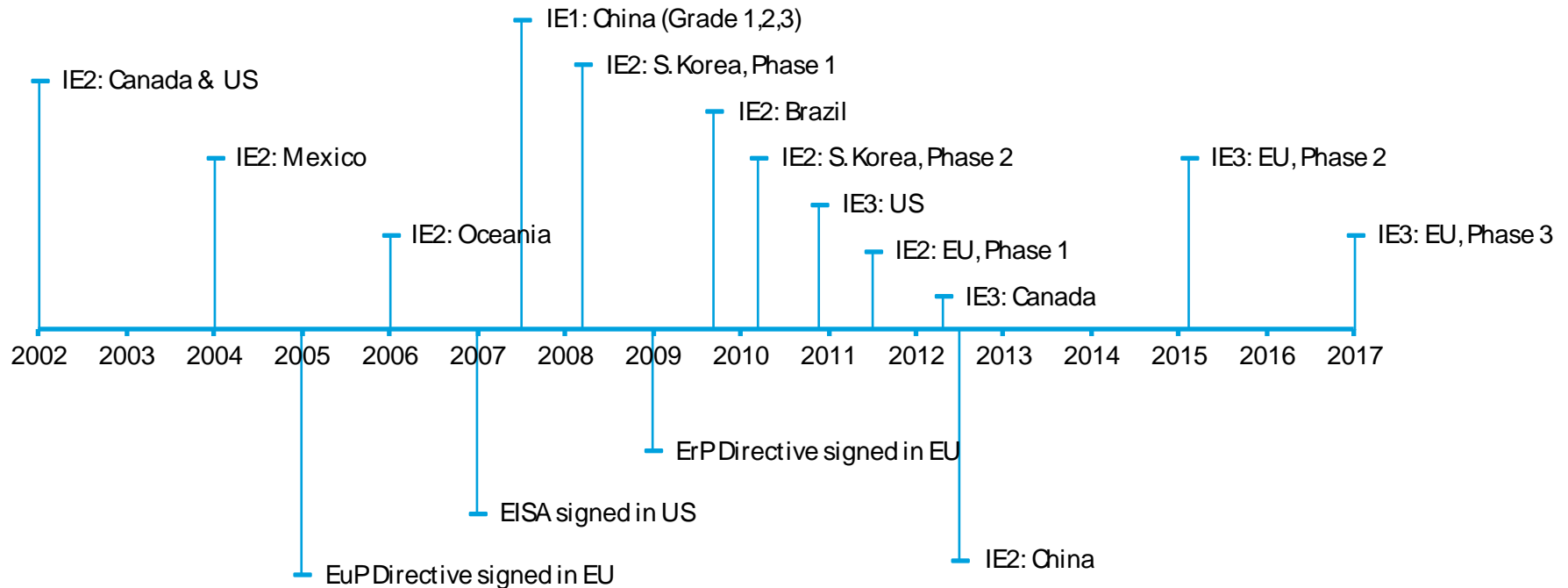
Low Voltage Motors – Legislative Timeline



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Timeline for Motor Efficiency Class Transitions Around the World



Source: IMS Research

Sep-12

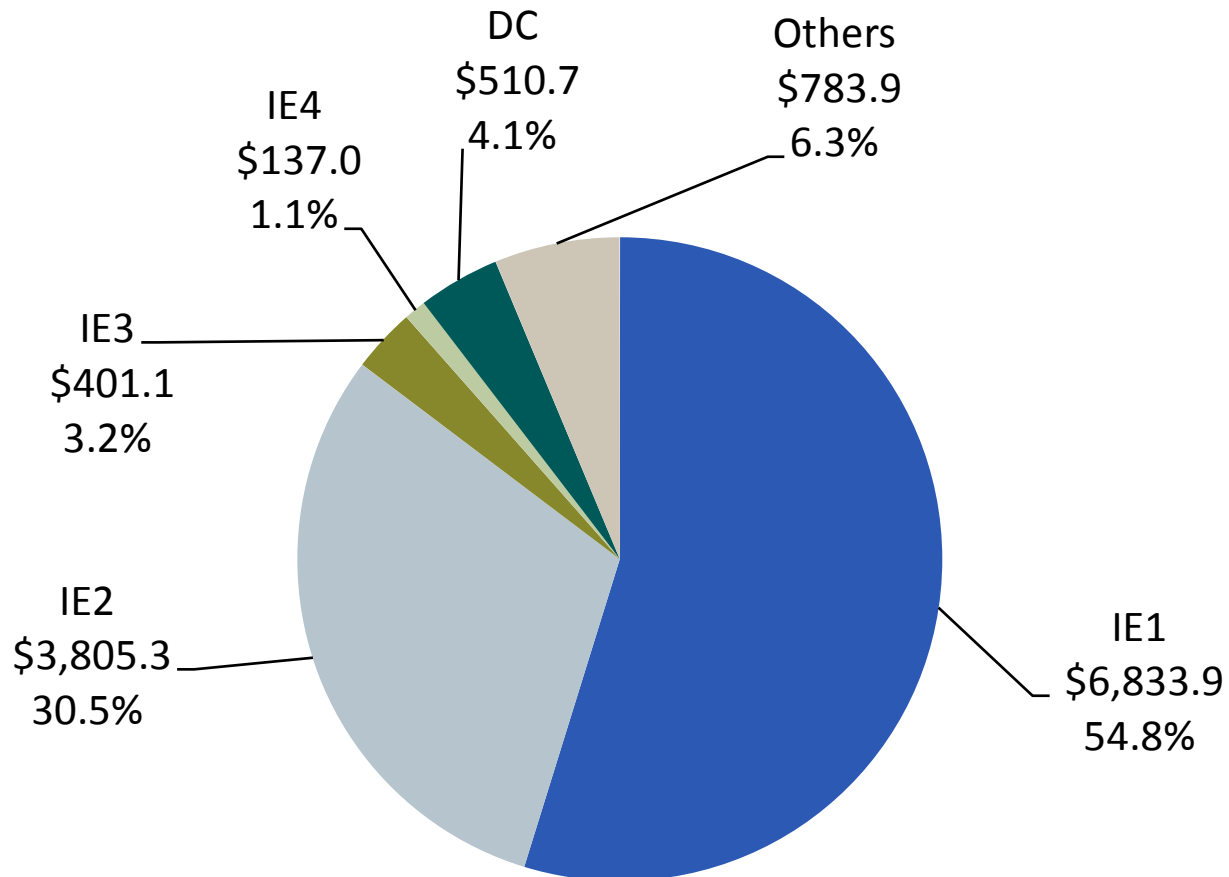
Low Voltage Motors – Market Data



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2010 Low Voltage Motors Market Product Type Breakdown (\$M)



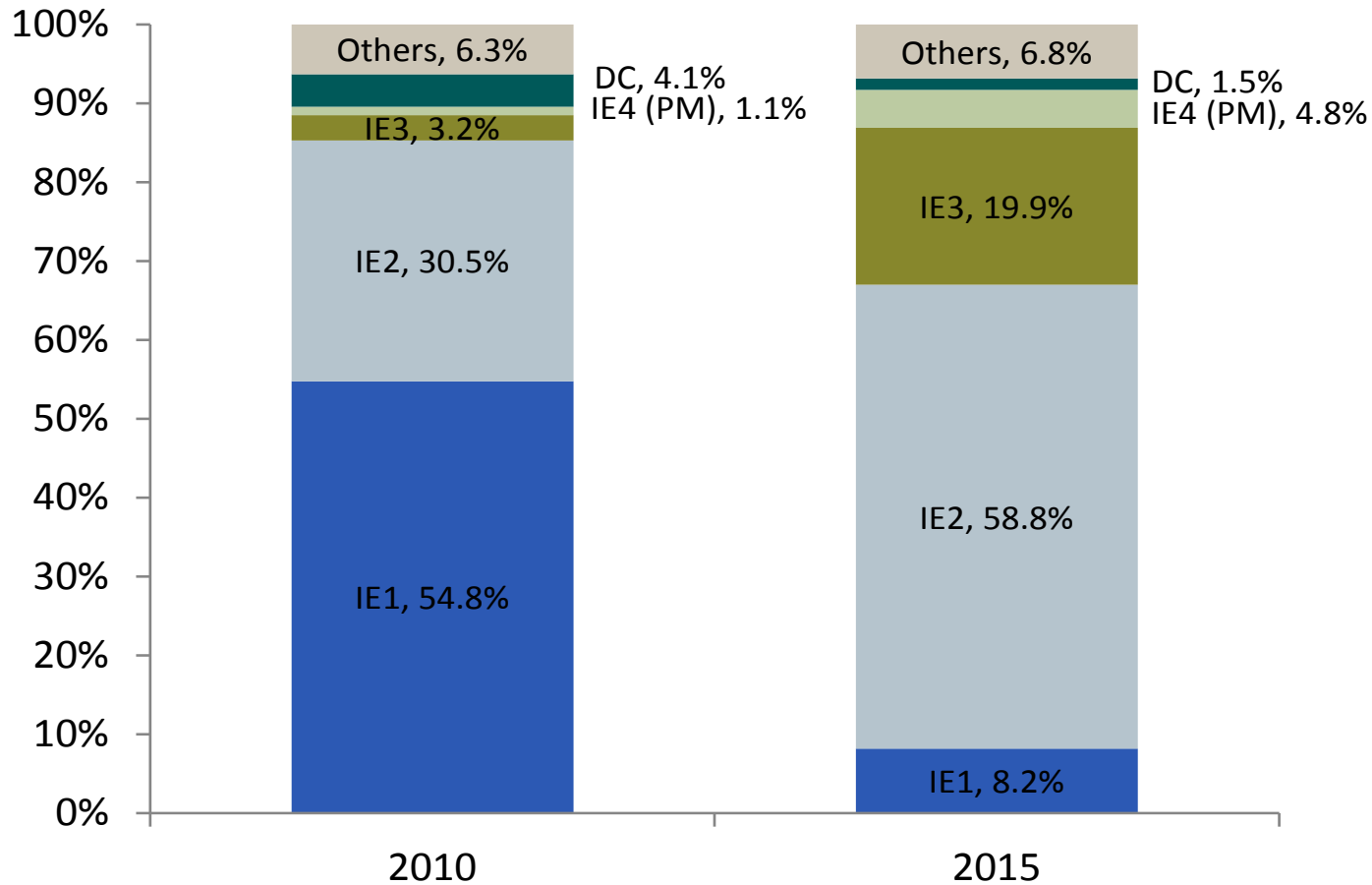
Low Voltage Motors – Market Data



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Low Voltage Motors Market Product Type Composition 2010 vs. 2015



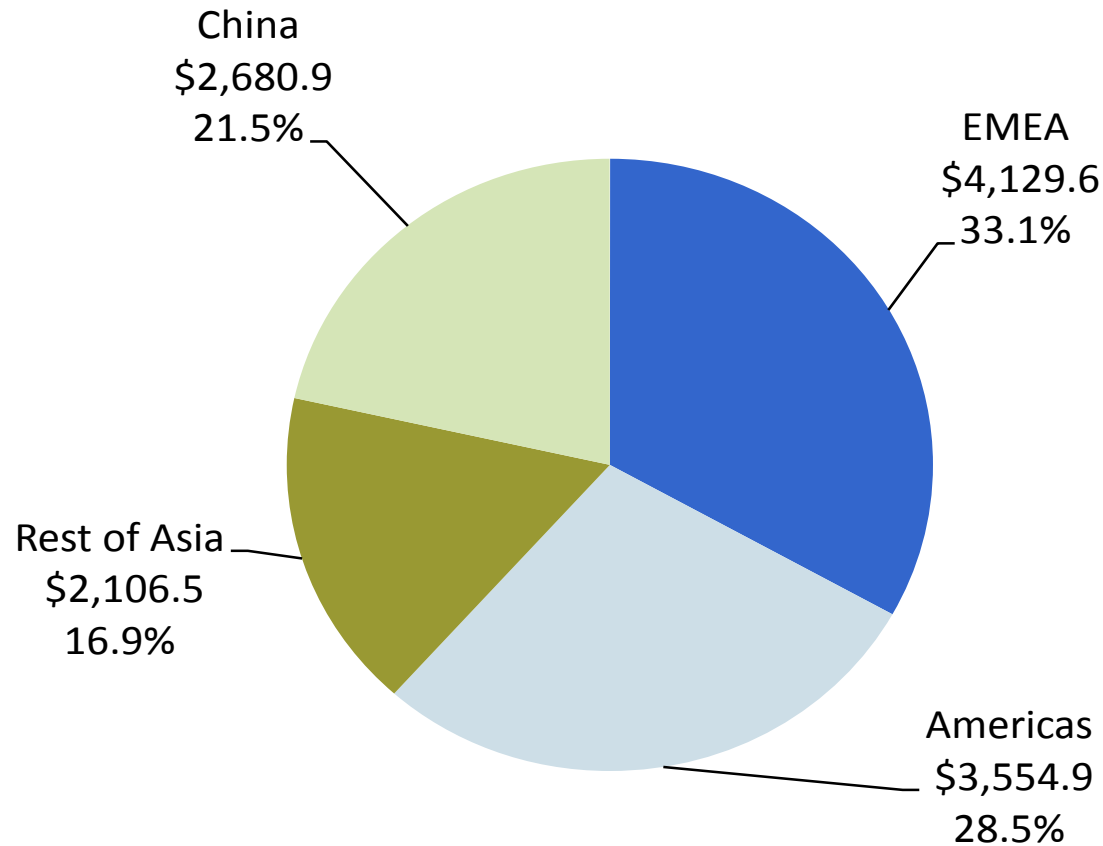
Low Voltage Motors – Market Data



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2010 Low Voltage Motors Market Regional Breakdown (\$M)





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Low Voltage Motors – Market Data

Top Industry Sectors in 2010

- Commercial HVAC (30%)
- Food, Beverage & Tobacco (13%)
- Mining (6%)
- Utilities
- Paper & Paperboard
- Elevators & Escalators
- Conveyors
- Automotive
- Chemicals & Petroleum
- Packaging & Labeling
- Rubber & Plastics

Top Suppliers in 2010

- Siemens (8.5%)
- Baldor (7%)
- ABB (6%)
- Regal Beloit
- WEG
- TECO
- Leroy Somer
- Toshiba
- Huali

The World Market for Low Voltage Drives



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Products Covered:

- **Compact AC Drives**
 - <25kW; typically used in fan & pump applications
- **Standard AC Drives**
 - <500kW; typically used in material handling and packaging applications
- **Premium AC Drives**
 - 1kW through largest; most demanding applications
- **DC Drives**
 - SCR based drives that control DC motors
- **Software & Services**



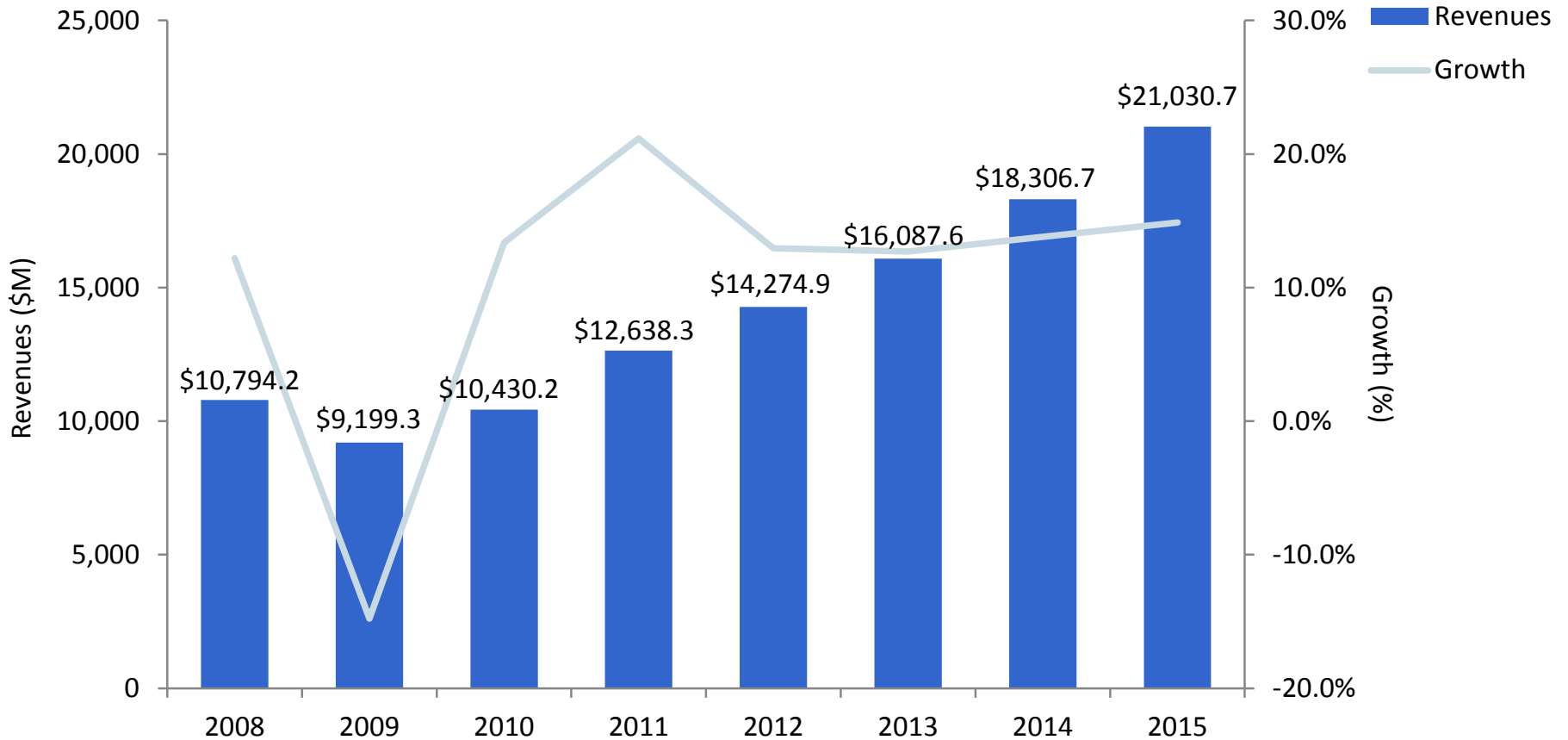


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Low Voltage Drives – Market Data

Low Voltage Motor Drives Market Market Size (\$M) and Growth



≈ 21 million low voltage drives shipped in 2011

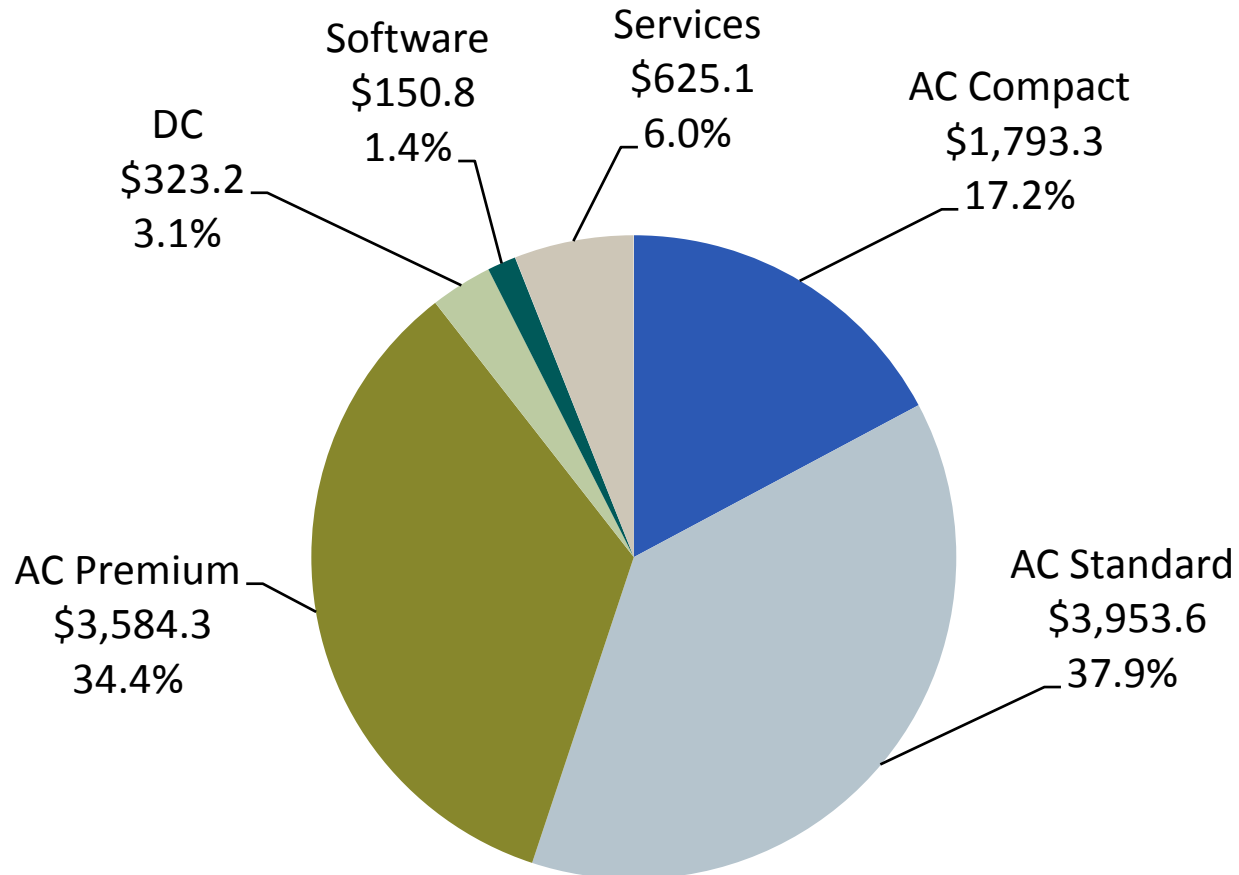
Low Voltage Drives – Market Data



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2010 Low Voltage Drives Market Product Type Breakdown (\$M)



Low Voltage Drives – Market Data

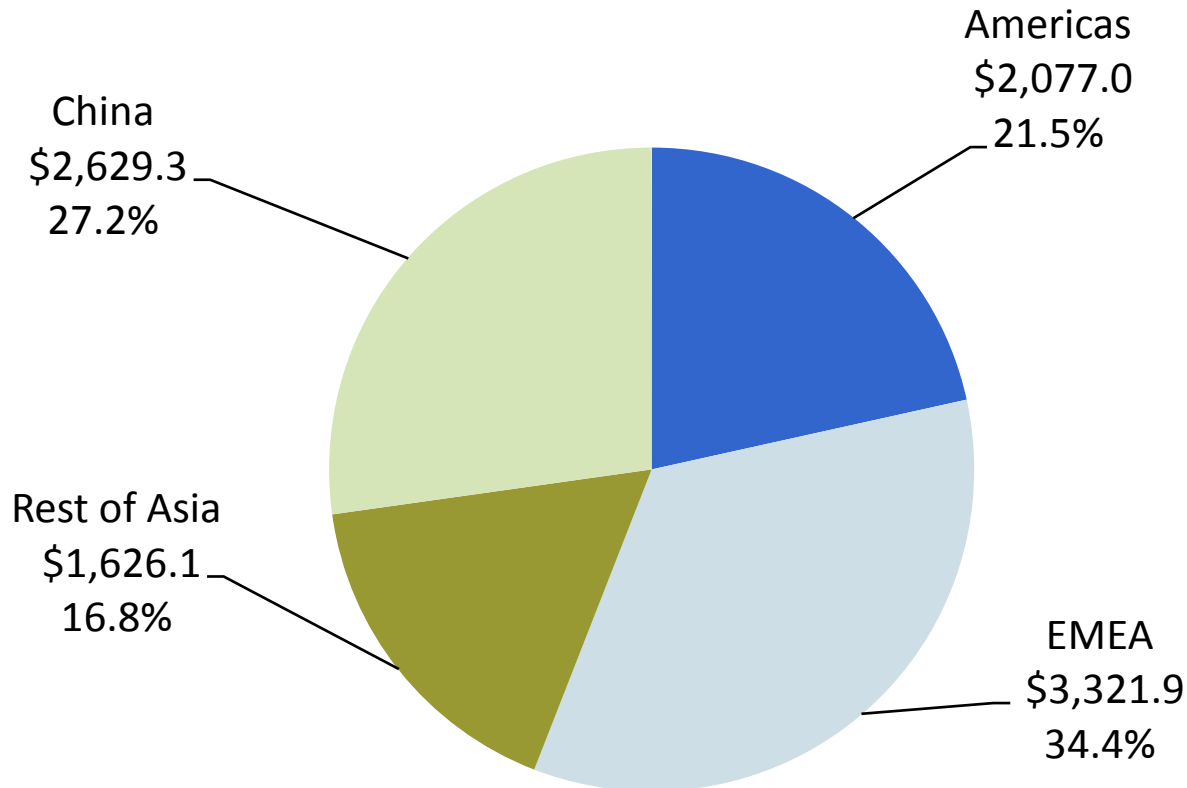


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2010 Low Voltage Drives Market Region Breakdown (\$M)

Hardware Only



Low Voltage Drives – Market Data

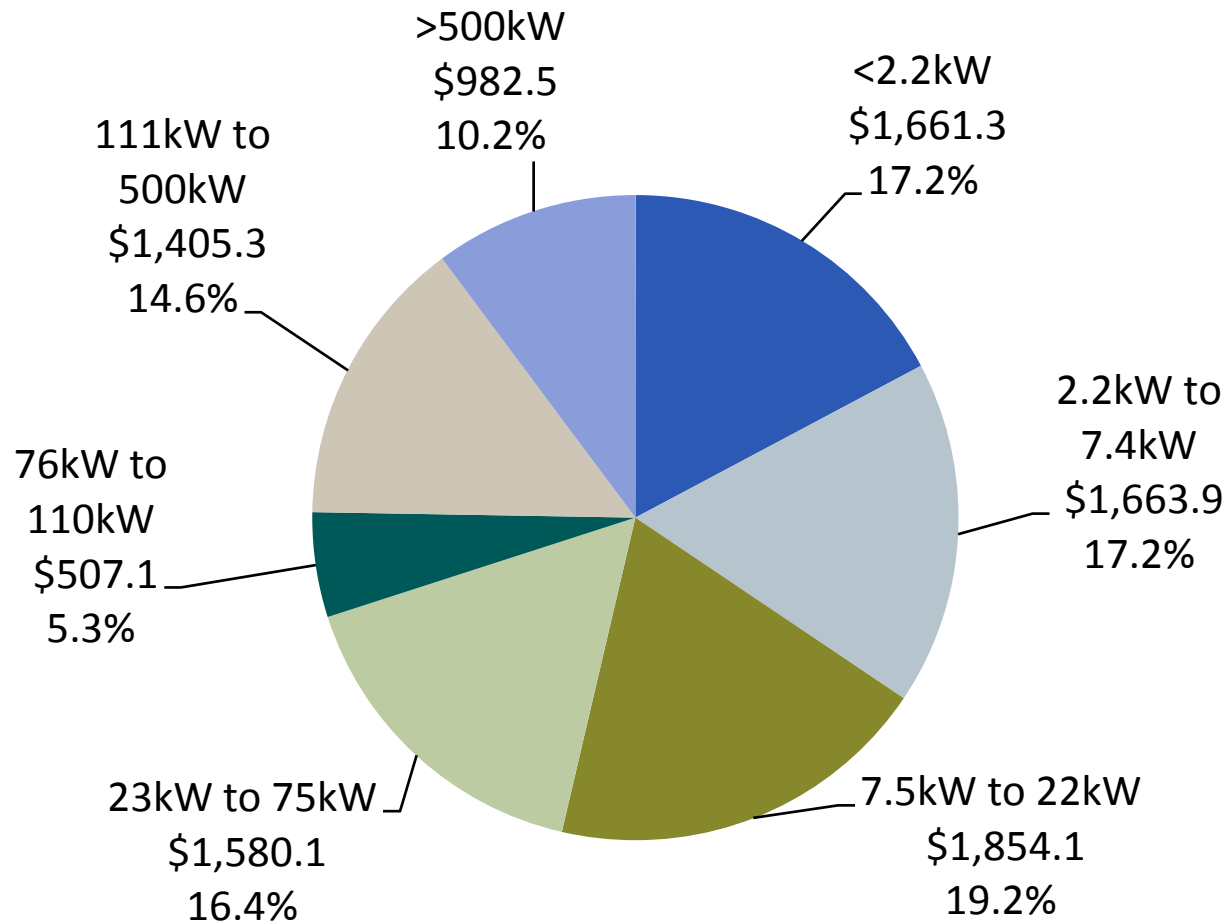


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2010 Low Voltage Drives Market Power Rating Breakdown (\$M)

Hardware Only





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Low Voltage Drives – Market Data

Top Industry Sectors in 2010

- Commercial HVAC (13%)
- Food, Beverage & Tobacco (7%)
- Metals (6%)
- Power Generation
- Water & Wastewater
- Textiles
- Conveyors
- Shipbuilding & Marine
- Paper & Paperboard
- Automotive
- Elevators & Escalators

Top Suppliers in 2010

- ABB (17%)
- Siemens (13%)
- Mitsubishi Electric (7.5%)
- Schneider Electric / STI
- Rockwell Automation
- Danfoss
- Yaskawa
- Vacon
- Emerson CT
- Fuji Electric
- SEW

Questions?



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