

Motor Summit 2018 International
14 November 2018, Zurich Switzerland

CEMEP Agenda

Claus A. Petersen – CEMEP President



CEMEP

CEMEP - who we are

CEMEP Members

 Austria	FEEI
 Belgium	Agoria
 Denmark	Dansk Industri
 Finland	The Federation of Finnish Technology Industries
 France	GIMELEC
 Germany	ZVEI
 Italy	ANIE
 Poland	PIGE
 Portugal	ANIMEE
 Spain	AFBEL
 UK	GAMBICA
 UK	BEAMA

- **CEMEP is the European Committee of Manufacturers of Electrical Machines and Power Electronics.**
- **About 30 companies are involved with their experts in the activities of CEMEP**
- **The members of CEMEP are the National Associations**

What CEMEP represents in Europe

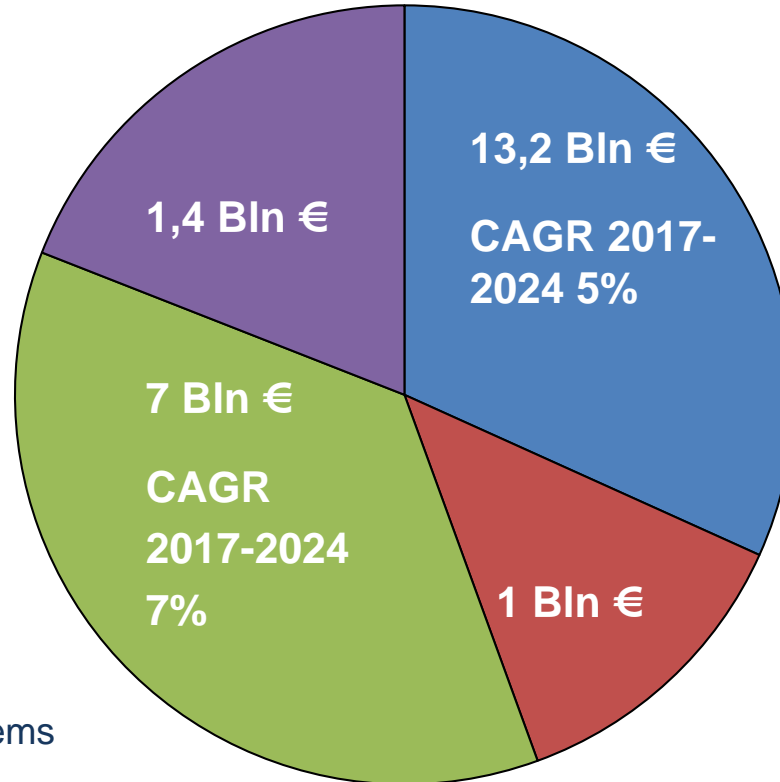
Year 2017



Uninterruptible power supplies



Low voltage motors



Variable speed drive systems



High voltage motors

➤ **Around 200,000 direct employees**

CEMEP estimate based on different public sources
CAGR: Compound annual growth rate

CEMEP Vision and Mission

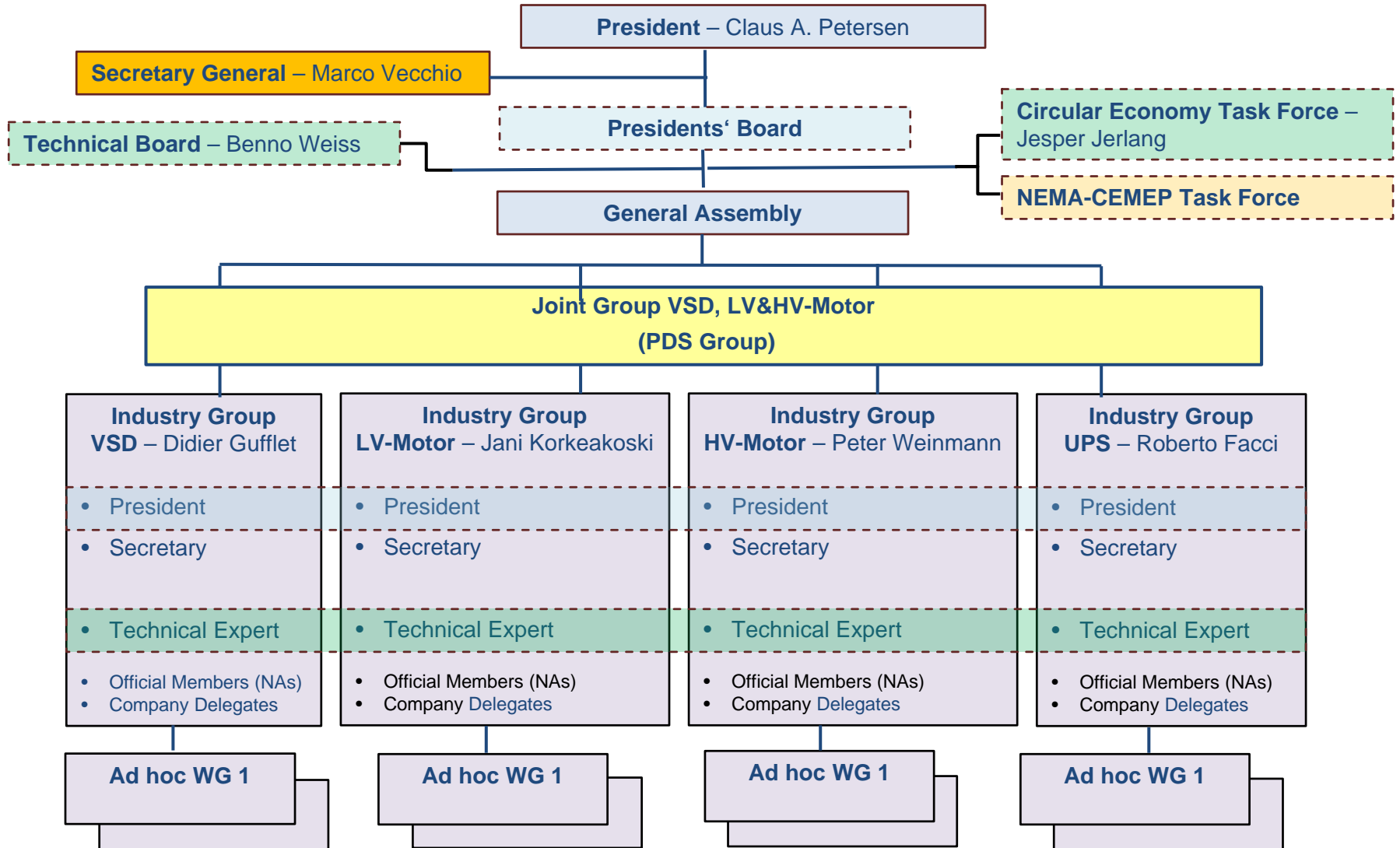
Vision

With a European focus and global reach, CEMEP is the voice of and forum for the power electronics and rotating electrical machinery industries, serving manufacturer members.

Mission

We represent and drive the interests of a high-tech sector in the field of innovation, interoperability, environment protection, market enhancement and global competitiveness with clear rules and compliant behavior of all members and manufacturers. As a respected partner, we create common political and technical positions to promote the common interests of the sector industry toward the EU institutions and other important stakeholders.

CEMEP Organization Chart

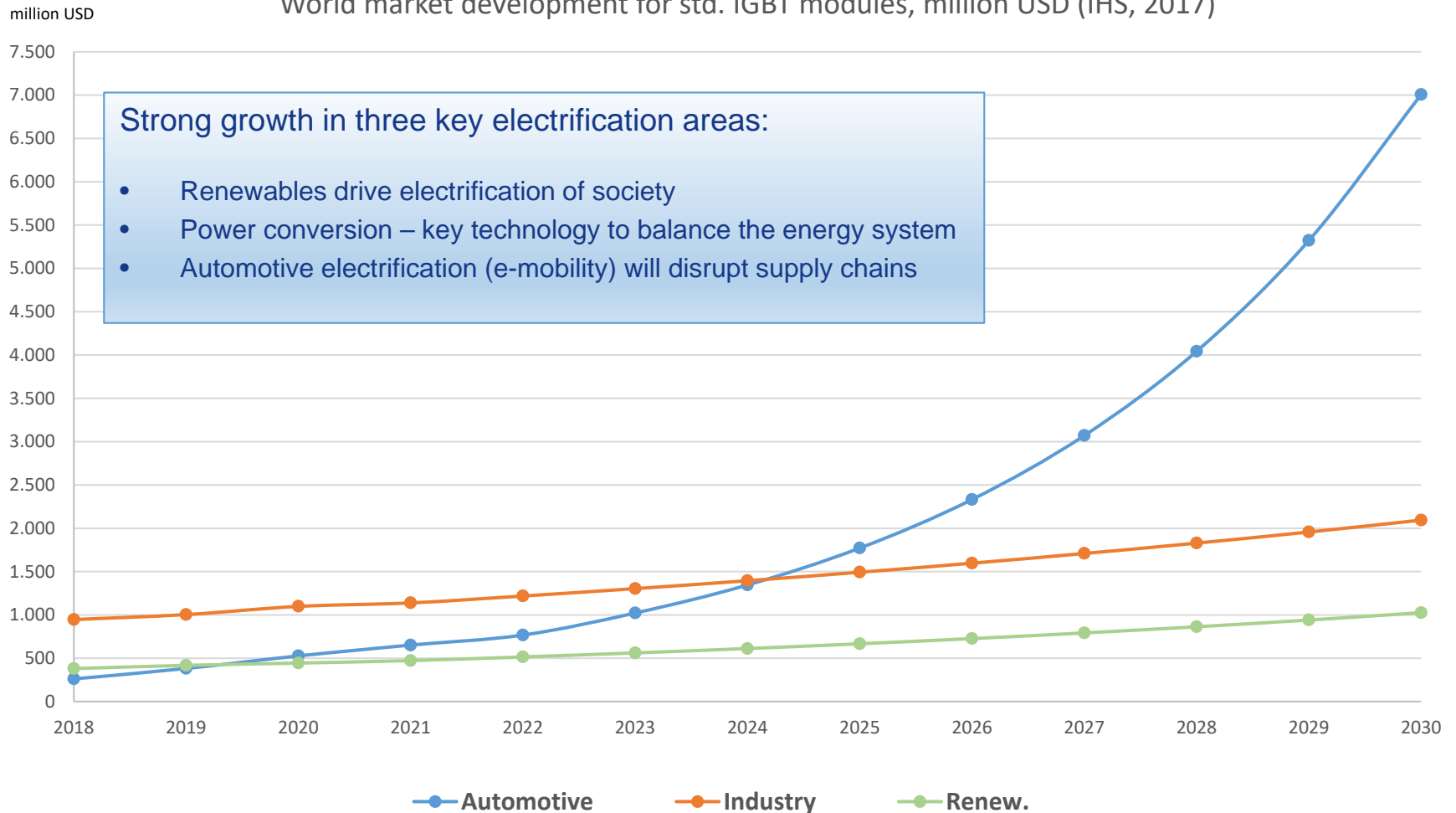


Invited members: Victoria Montag, Gunther Koschnick, Raj Vagdia, André Rouyer

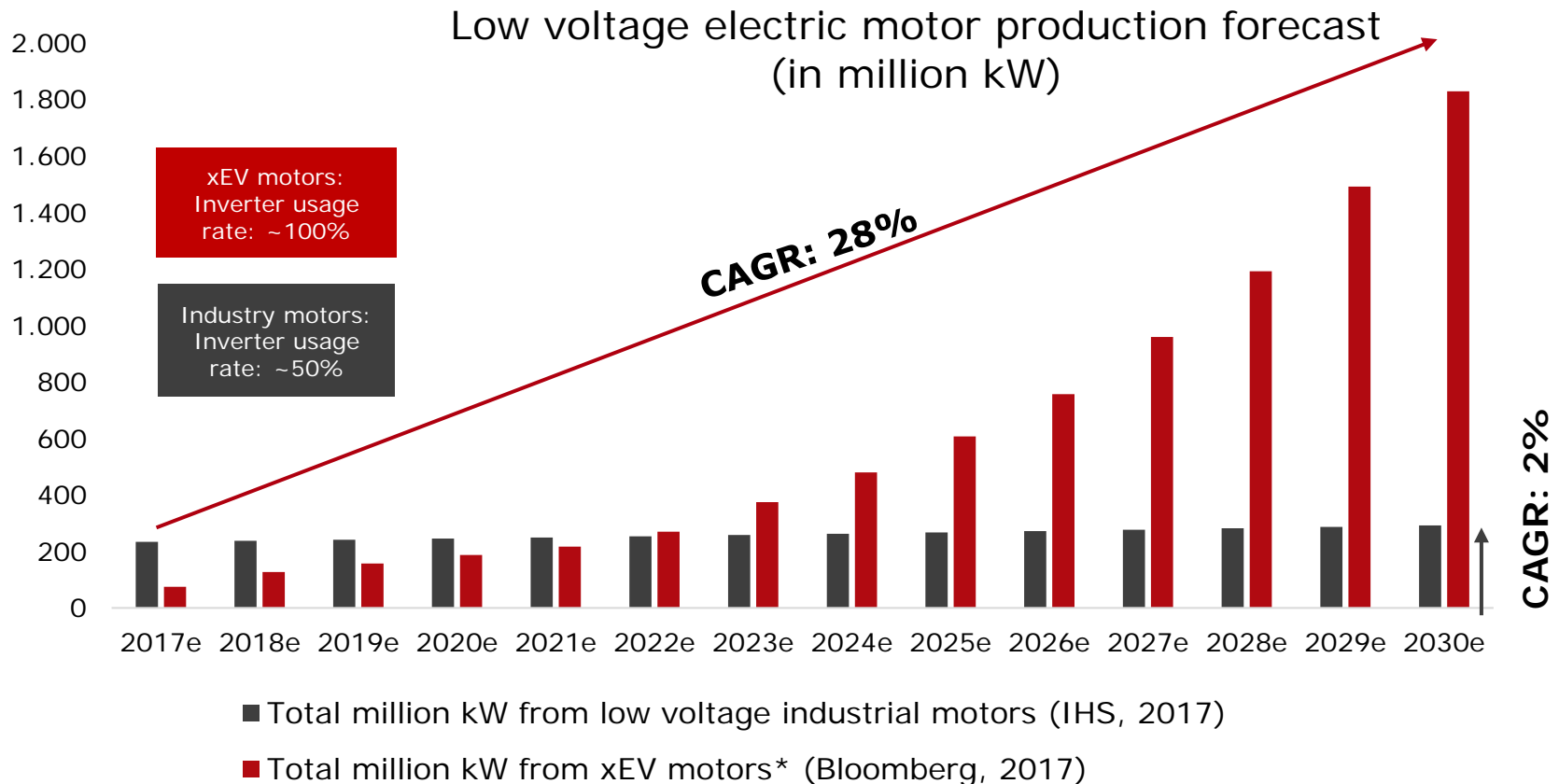
Current and future changes to the business environment

Electrification - opportunity and threat

World market development for std. IGBT modules, million USD (IHS, 2017)



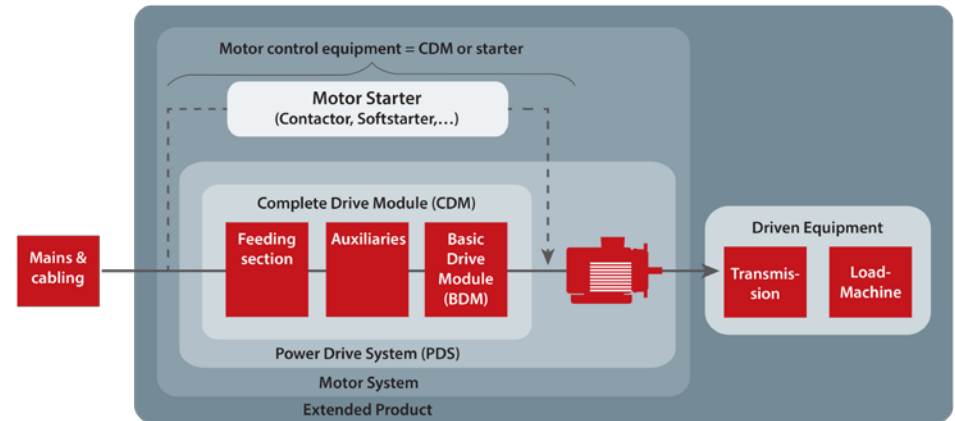
Inverter demand expected to increase radically



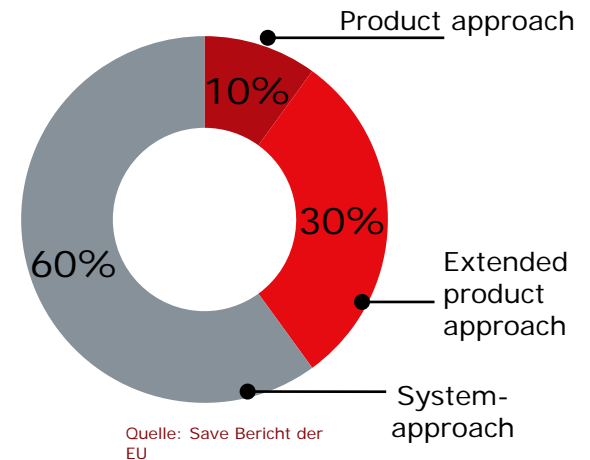
*Assuming an average of 75kW pr. automotive motor and an average of 5,9kW per industrial electric motor (excl. motors <2.25 kW)

Regulatory challenges - energy efficiency

- EU and national authorities continue focusing on component requirements, despite the fact that the *extended product approach* is superior in terms of energy savings
- Standards and models are in place
- Focus and investments are not allocated to where the energy saving potential is biggest
- Ecodesign is lacking the proper tools for harvesting efficiency potentials
- EU will not reach energy saving goals
- Industry will have unnecessary costs



Energy savings potential



Regulatory challenges - Circular Economy and material efficiency

- Energy efficiency and material efficiency requirements may be conflicting (electric motors)
- Current approach: same standards for Consumer and Industrial products – *but one size does not fit all!*
- CEMEP position paper published

	B2C product features	B2B (CEMEP) product features
Durability	2 – 10 years	10 – 30 years considering the full life cycle assessment of product, the dependability, the environmental impact.
Repair, reuse, upgrade	Only a few service businesses, most consumer products are not repaired	Existing and mature service business, managed by professional companies, having skilled competencies often supported by CEMEP companies
Re-manufacture	Not possible or limited, even if some local initiatives appear also led by NGO's	Existing well-established remanufacturing industry, typically SME's in operation since CEMEP products were introduced to the market
Recyclability & recoverability	Difficult due to integrated construction and mix of materials	Easy due to less integrated construction, materials well suited for recycling
Re-using components	possibly difficult	Possible for motor casings, cabinets etc.

Future development of CEMEP

CEMEP will actively address challenges and changes
CEMEP is committed to support both companies and society

- New organisation and financing model
- Stronger presence in Brussels
- Provide data and facts to support effective political decisions

The logo for CEMEP, featuring the letters 'CEMEP' in a white, sans-serif font on a dark blue background. The 'C' has a small white dot inside its top curve. To the right of the text, there is a white geometric pattern consisting of several lines forming a diamond shape with a small white circle at its center.

CEMEP

Thank you for the attention!

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