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Industrial Motors & Motor Controls Market Update

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Presentation Overview

- The Chinese Market Updates
 - Low Voltage Motors
 - Industrial FHP Motors
 - Low Voltage Motor Drives
 - Motion Controls
- Questions?

The Chinese Market for Low Voltage Motors

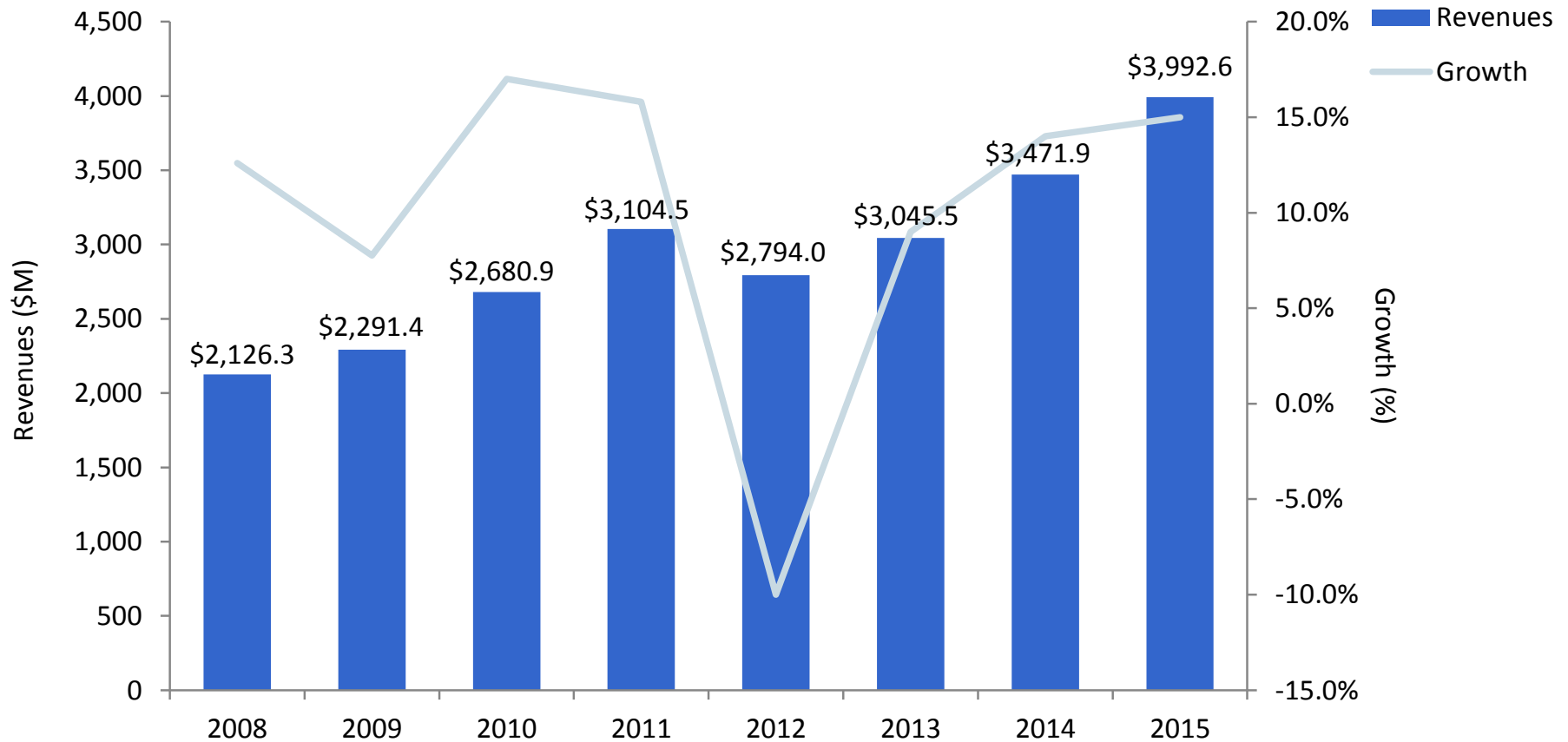
Products Covered:

- 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



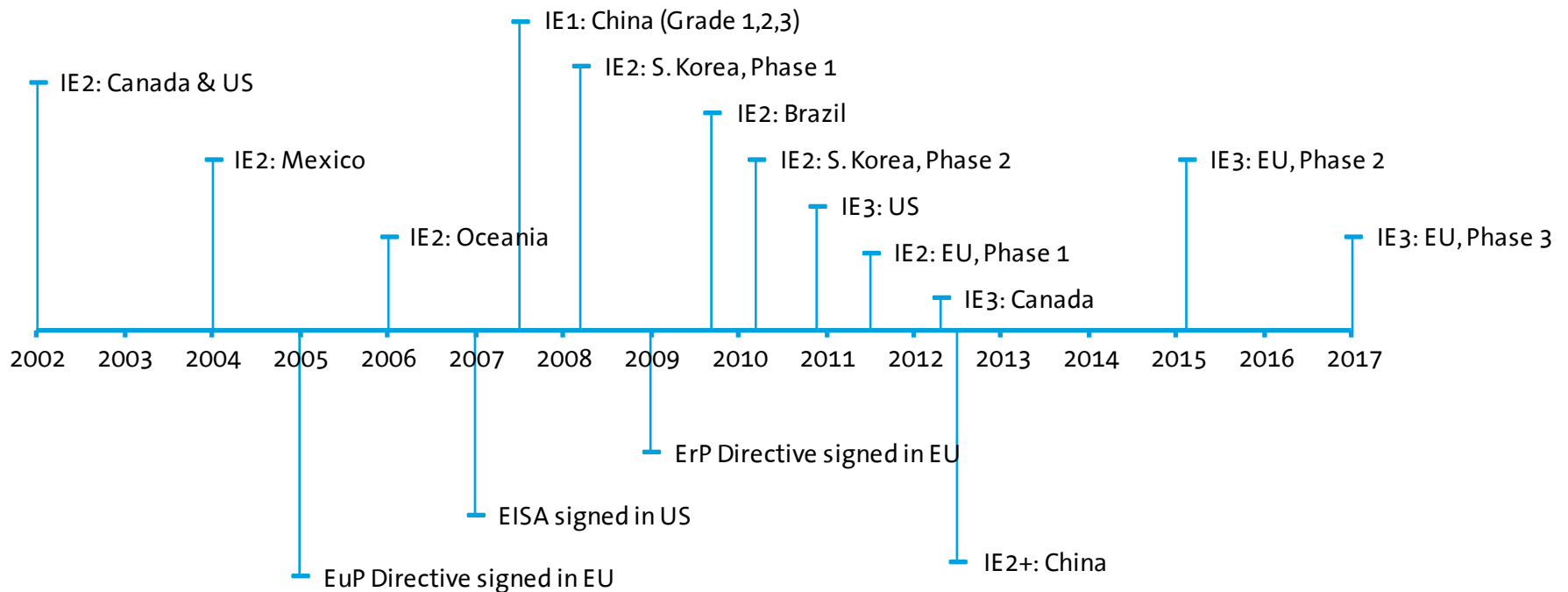
Low Voltage Motors – Market Data

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



Low Voltage Motors – Legislative Timeline

Timeline for Motor Efficiency Class Transitions Around the World

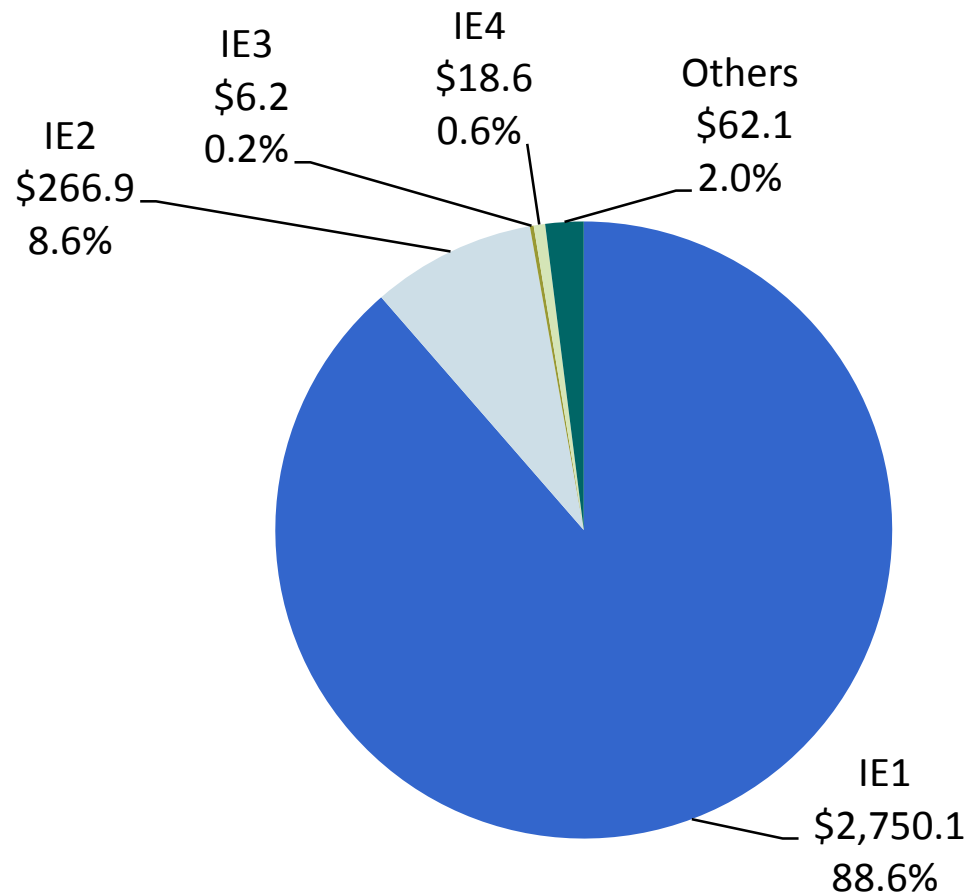


Source: IMS Research

Feb-12

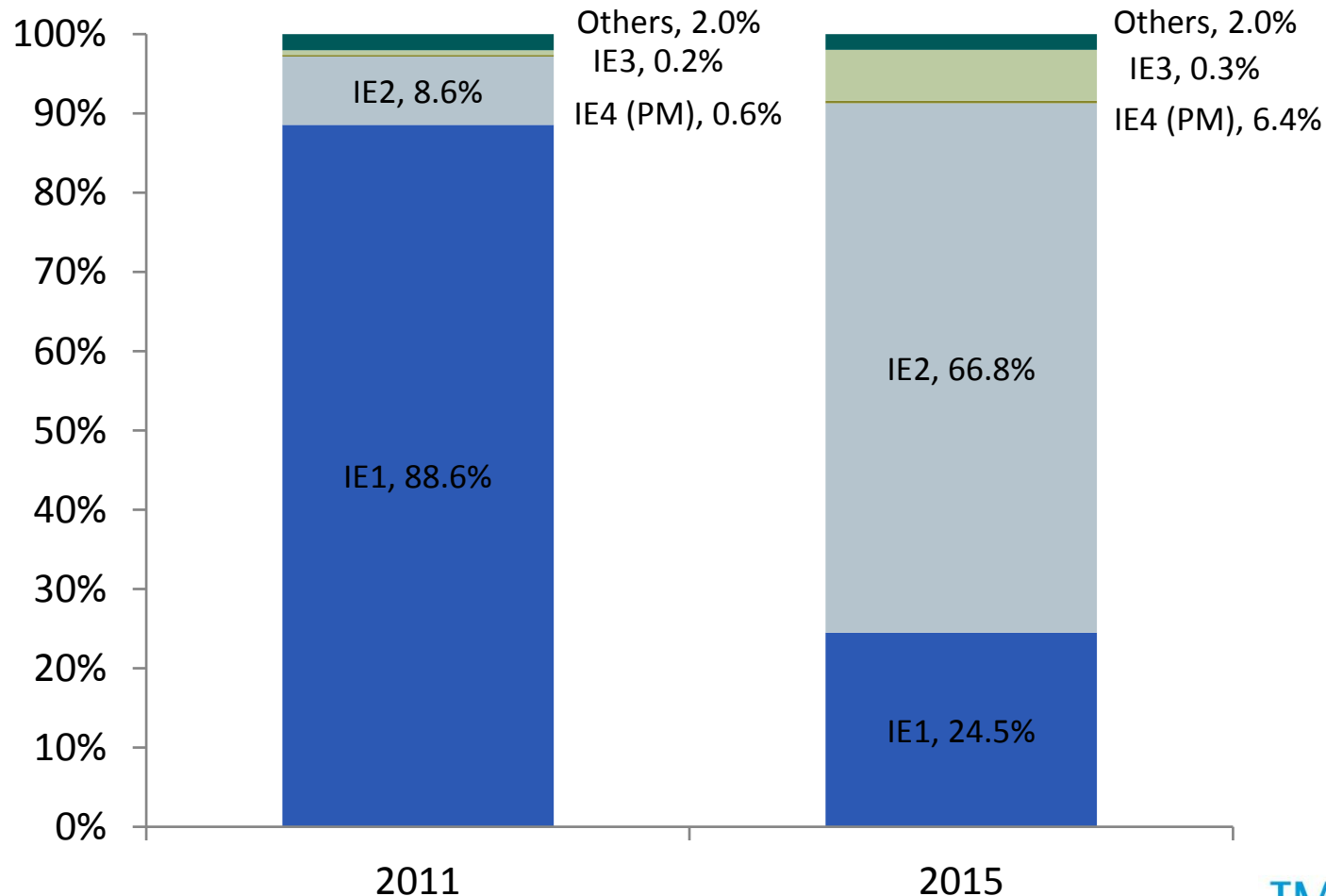
Low Voltage Motors – Market Data

2011 Chinese Low Voltage AC Motors Market Product Type Breakdown (\$M)



Low Voltage Motors – Market Data

The Chinese Low Voltage Motors Market Product Type Composition 2011 vs. 2015



The Chinese Market for Industrial FHP Motors

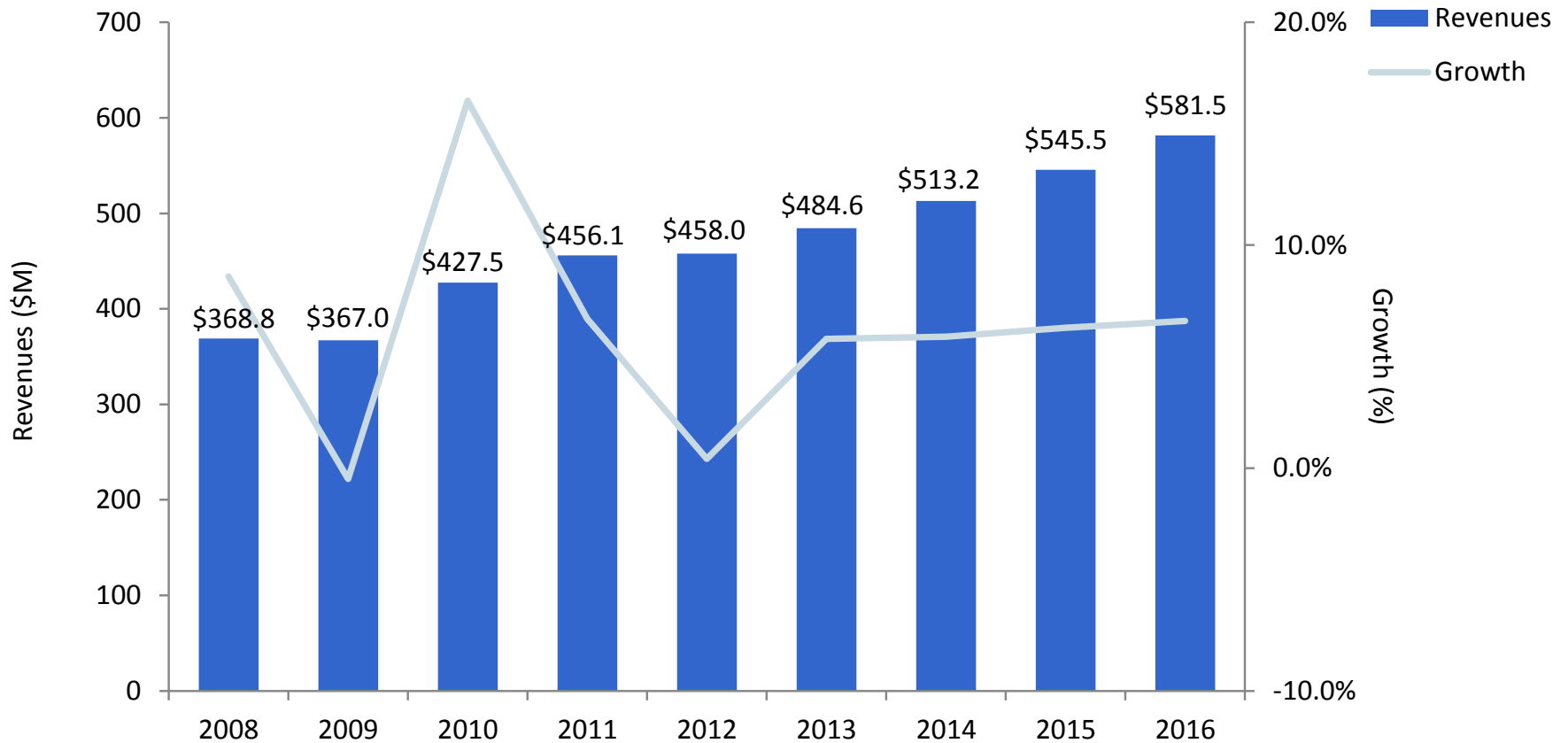
Products Covered:

- AC Induction Motor
- AC Synchronous Motor
- DC Brushed Wound Motor
- DC Brushed Permanent Magnet Motor
- DC Brushed Coreless Motor
- DC Brushless Permanent Magnet Motor
- DC Brushless Slotless Motor



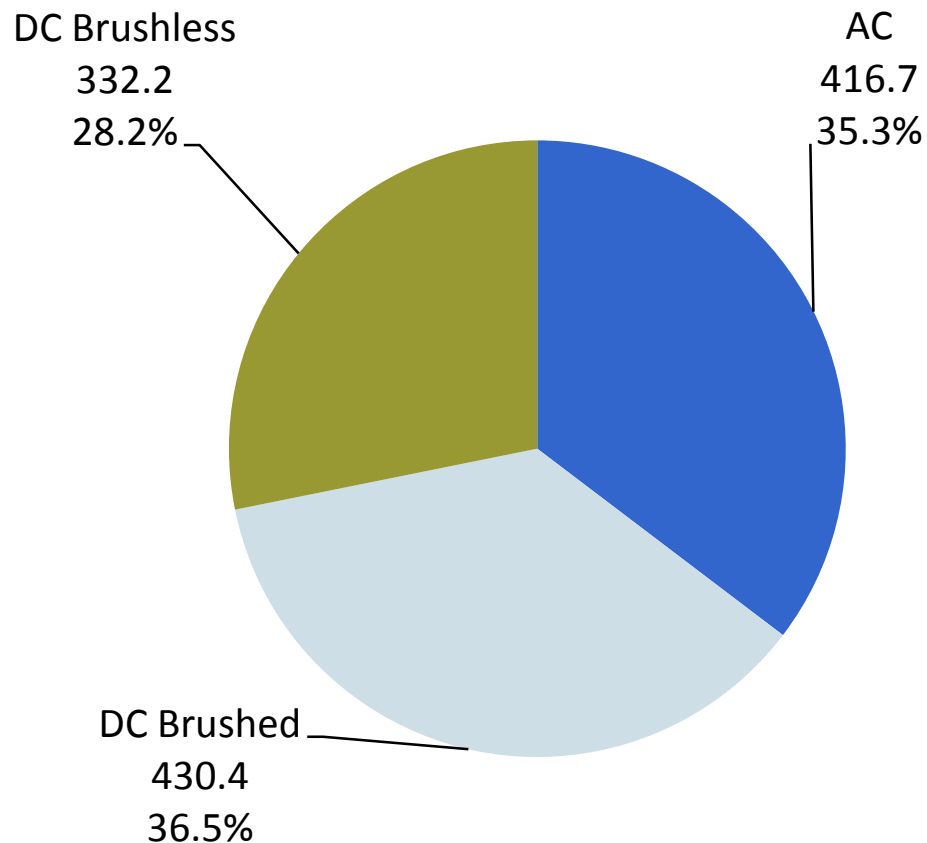
Industrial FHP Motors – Market Data

The Chinese Industrial FHP Motors Market
Market Size (\$M) and Growth



Industrial FHP Motors – Market Data

2011 Industrial FHP Motors Market Product Type Breakdown (\$M)



The Chinese Market for Low Voltage Drives

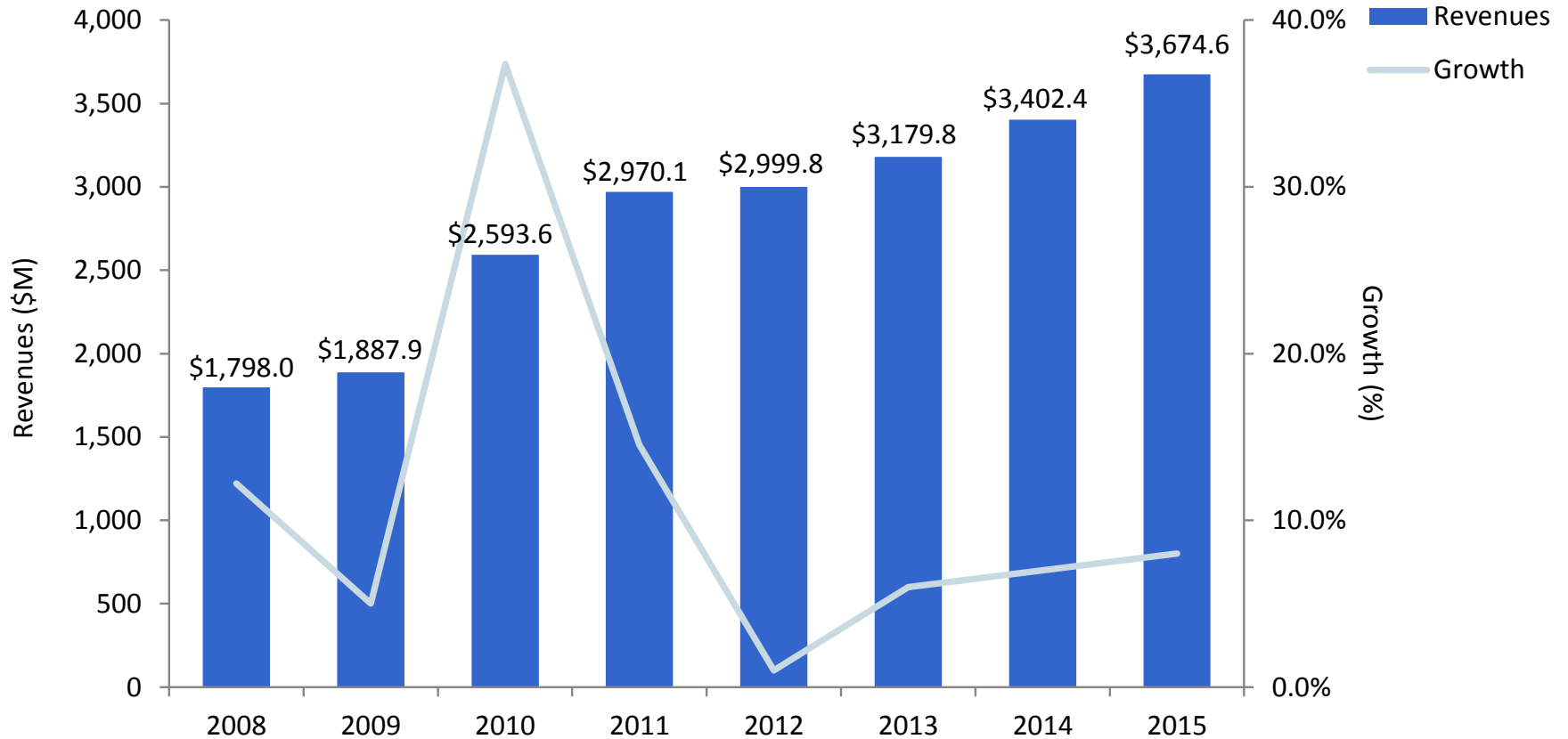
Products Covered:

- **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



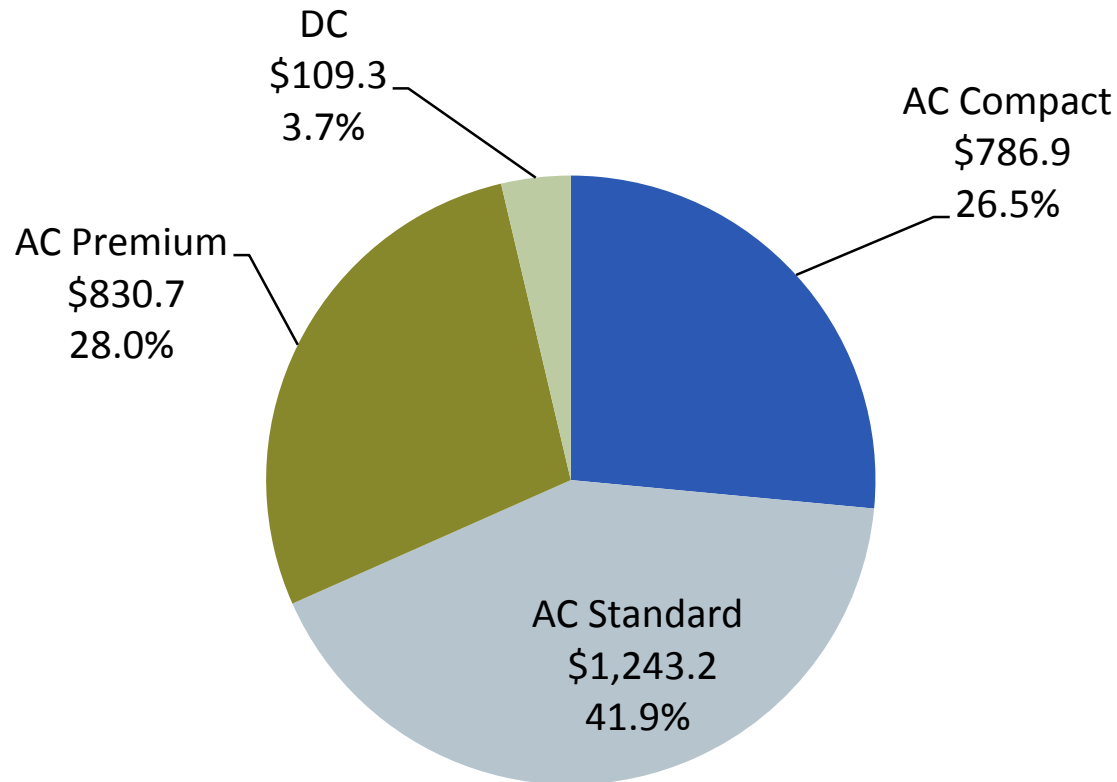
Low Voltage Drives – Market Data

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



Low Voltage Drives – Market Data

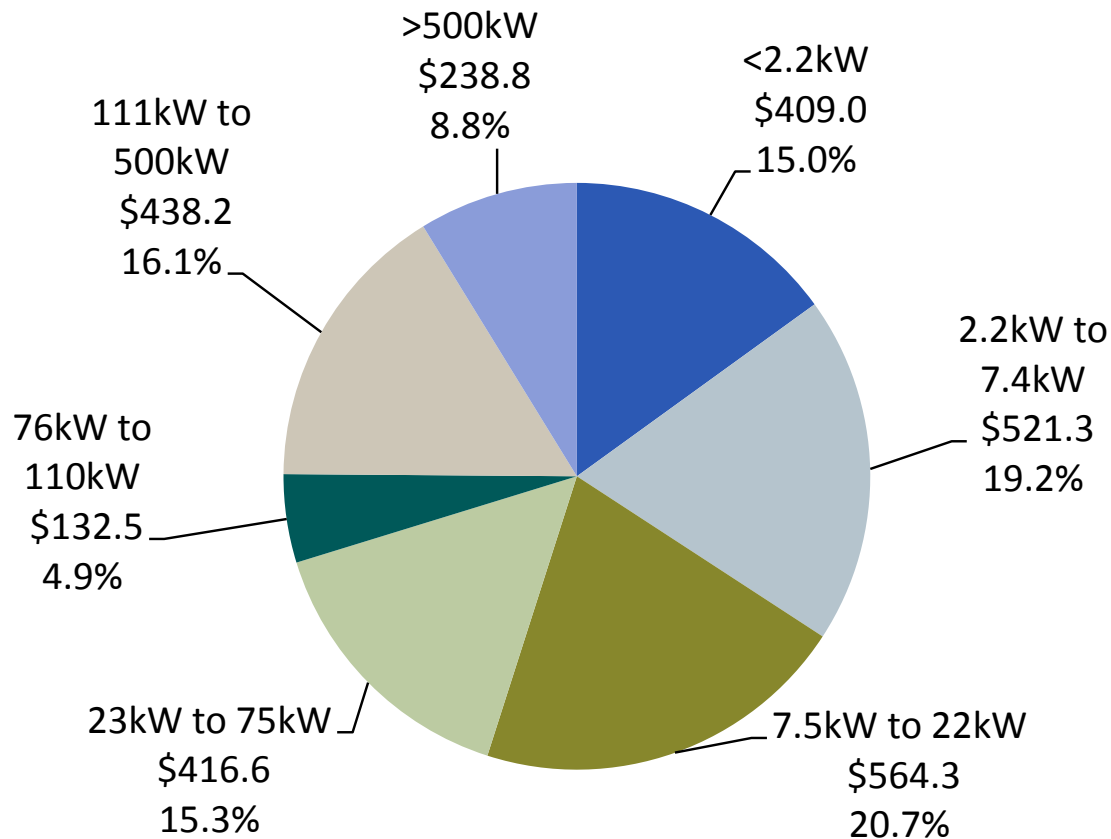
2011 Low Voltage Drives Market Product Type Breakdown (\$M)



Low Voltage Drives – Market Data

2011 Chinese Low Voltage Drives Market Power Rating Breakdown 3 - phase(\$M)

Hardware Only



The Chinese Market for Motion Controls

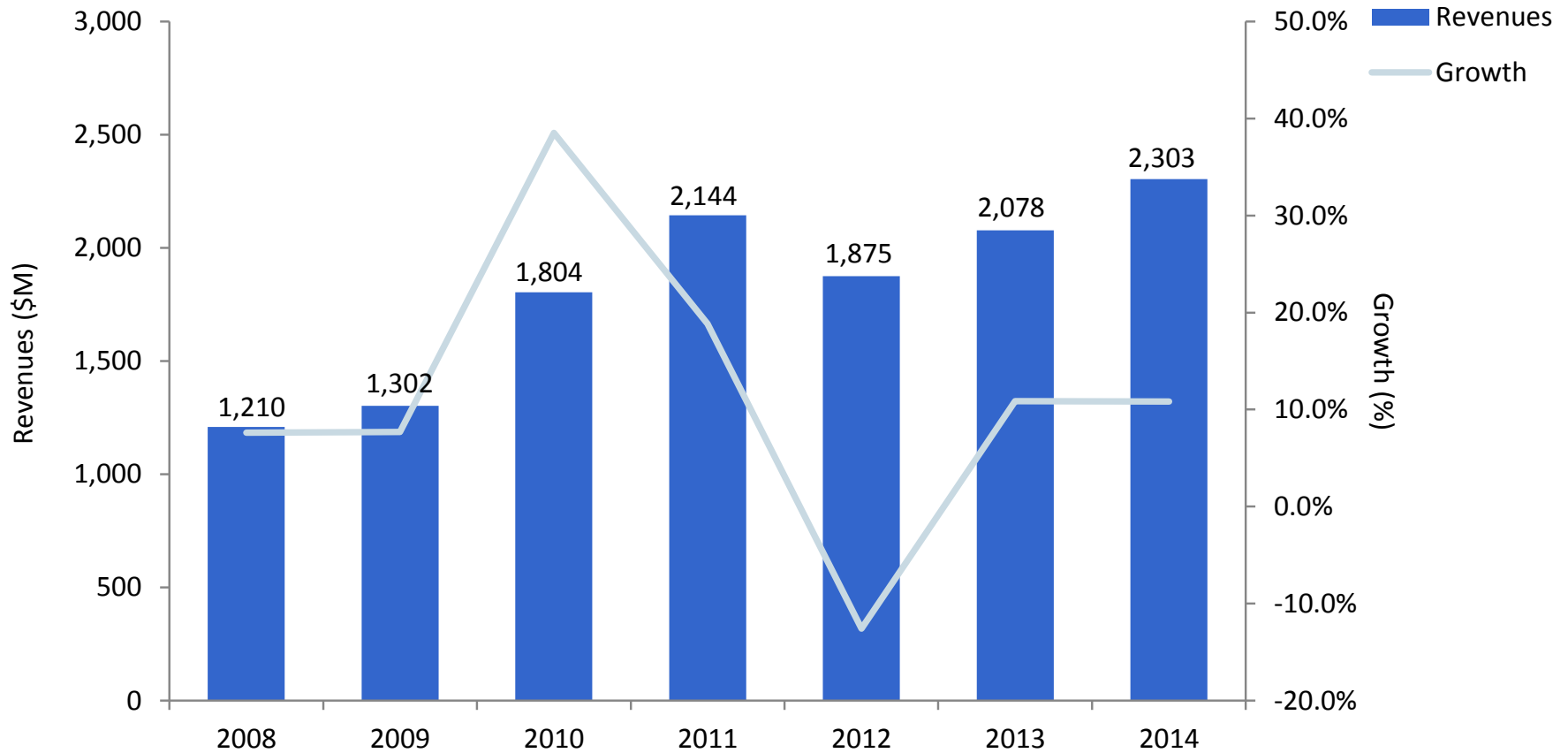
Products Covered:

- Servo Motors (GMC)
- Servo Drives (GMC)
- Position Control Hardware
- Servo Motors (CNC)
- Servo Drives (CNC)
- CNCs (Computer Numeric Controllers)



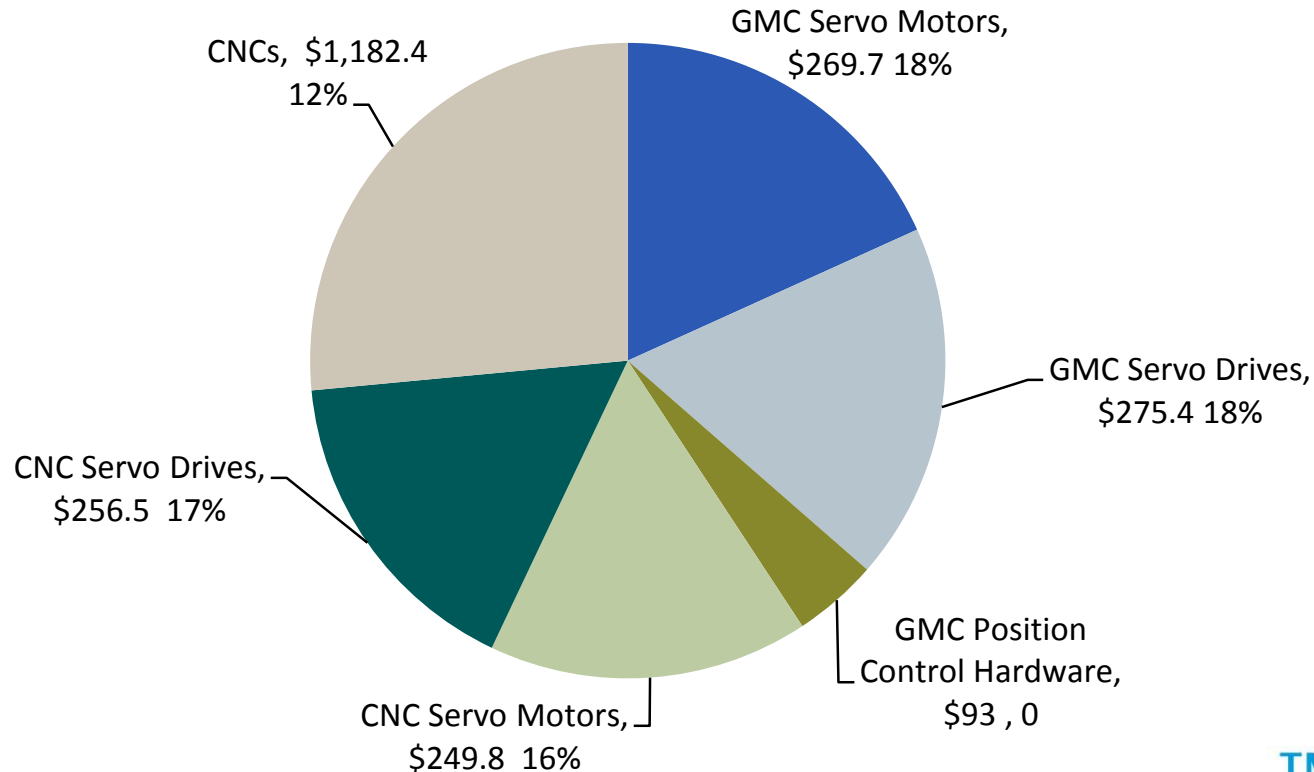
Motion Controls – Market Data

The Chinese Motion Controls Market
Market Size (\$M) and Growth



Motion Controls – Market Data

2011 Chinese Motion Controls Market Product Type Breakdown (\$M)



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An Established and Global Company

- Selling reports across 50 countries and to over 2500 clients
- Released over 250 syndicated reports in 2010
- Continued and substantial growth - 42% growth in FY11
- Founded in 1989
- Recently acquired by IHS Inc. (NYSE:IHS)



Industrial Automation Group

Discrete Automation	Control & Visualization	PLCs, Embedded Computing, Safety, Machine Vision, Operator Terminals
	Industrial Communications	Industrial Ethernet, Industrial Network, Wireless Communications, Networking User Surveys
Process Automation	Process Control	DCS, Hazardous Area Equipment
	Process Instrumentation	Flow Meters, Pressure & Temperature Transmitters, Process Control Valves
Motion & Drives	Motor Control	MV & LV Drives, Regenerative Drives, Low Harmonic Solutions, CNC, MCCs, Soft Starters, Servo & Stepper Systems
	Motors	Fractional HP Motors, Low Voltage Motors, Medium Voltage Motors, Direct Drive (Linear & Torque) Motors, Generators.
Other Industrial	Power Transmission	Linear Motion, Geared Products, Pneumatic Components, Hydraulic Components
	Machinery	PV (Solar) Manufacturing Machinery, Packaging Machinery, Machinery Production Yearbooks
	Switchgear	Relays, Circuit Breakers, Residual Current Devices, Switches, Fusegear

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- Provide comprehensive content, expert analysis and analytics

Helping our customers drive critical processes and make high-impact decisions with speed and confidence

IHS Content & Expertise

Content and expertise in key areas that shape today's global business landscape:

Energy & Power



Design & Supply Chain



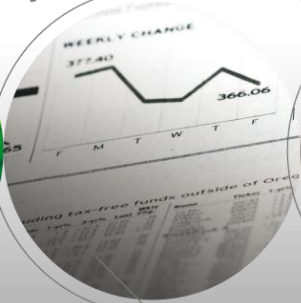
Defense, Risk & Security



EHS & Sustainability



Country & Industry Forecasting



Commodities, Pricing & Cost



- Aerospace & Defense
- Agriculture
- Automotive
- Chemicals
- Construction

- Consumer & Retail
- Energy Oil & Gas
- Financial
- Government

- Healthcare
- Metals & Mining
- Military & Security
- Power & Utilities
- Renewable Energy

- Shipping & Transportation
- Technology, Media & Telecommunications

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Energy & Power



Design & Supply Chain



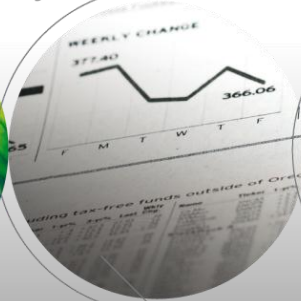
Defense, Risk & Security



EHS & Sustainability



Country & Industry Forecasting



Commodities, Pricing & Cost



- Herold
- Syntex
- The Energy Daily
- GCS
- RapidData
- GDS
- JFA International
- McCloskey Group
- LogTech (Canada)
- Emerging Energy Research
- ODS-Petrodata
- SMT Kingdom
- Purvin & Gertz

- iSuppli
- ScreenDigest
- PCNAAlert
- PartMiner
- CAPS
- Displaybank
- GlobalSpec
- IMS Research
- Invention Machine

- Jane's
- Lloyd's Register
- Fairplay
- Documental Solutions

- Dolphin
- EnvironMax
- ESP
- ESS
- Atrion
- Syntex
- Dyadem
- CyberRegs

- Global Insight
- QMS – EViews
- CSM Worldwide
- ChemWeek
- SRI Consulting
- Harriman
- Chemsult
- CMAI
- Purvin & Gertz
- BDW Automotive

- Global Insight
- QMS - EViews

Questions?

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