Opportunities Grow for Linear Motors

Contributed by IMS
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The all time high in semiconductor machinery production experienced in 2000 was a boon for linear motors, which could offer customers major improvements in dynamic performance and accuracy in comparison with more traditional products. However, on the other side of the semiconductor upturn came a catastrophic couple of years of recession for the industry. In 2000 the world semiconductor capital equipment market peaked at $48 million, and then proceeded to shrink by almost 40% in 2001 and an additional 30% in 2002. This resulted in over half of the value of the market being lost within two years. These were levels of contraction not previously experienced, even in such a notoriously cyclical industry. Consequently the linear motor market was noticeably impacted by the downturn, resulting in a number of suppliers exiting the market.

Recent years have provided a stabilising of the linear motor market, with growth levels finding a medium between the two extremes previously experienced. Arguably the main contributing factor to the unpredictable development of this market is the dependency that it had on the semiconductor industry. In 1999 it is estimated that this sector accounted for around half of all linear motor sales in Europe. As such, the dramatic fluctuations experienced by the semiconductor industry have had a major impact on the growth of the linear motor market.

As the level of education within the industry, combined with the continued reduction in the cost of linear motors improves, more industries are beginning to consider the benefits offered by these products. The most notable industry is machine tools, which in EMEA is the largest sector, accounting for almost one-third of linear motor sales. Many machine tool manufacturers have been presenting linear motor driven technology within machines at recent trade shows. Conversely, the proportion of the market accounted for by semiconductor applications has dropped to around one fifth of all sales, as companies diversify to lessen their dependency on a single industry.

Opportunities are also arising within the lower cost industries, such as material handling and packaging machinery, which provide the opportunity for massive unit growth. Although prices continue to fall, widespread acceptance in these price sensitive markets is not expected in the near future. However, linear motors are expected to filter in to these industries at the top-end as they replace more traditional technologies.

As the use of direct drive technology increases in these other industries the continued diversification will provide a solid platform for growth.