



Global and China Micro and Special Motor Industry Report, 2011-2012

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and our in-house database etc.

Abstract

In 2011, the micro & special motor industry saw the price of its most crucial raw material NdFeB soar, with the price of sintered NdFeB magnet increasing from RMB 107/kg at the beginning of 2011 to RMB 607/kg in July and to RMB 330/kg in early November. However, as raw materials only account for a very small proportion (less than 5%) of the cost of micro & special motor, the price hike didn't promote the prices of micro & special motors or reduce the profits of micro & special motor manufacturers.

In 2010-2011, the smart phone market was booming, the autofocus function became a standard configuration of smart phone and an option for some feature phones. VCM manufacturers shipped products in the form of AF actuator module. South Korean JAHWA and Hysonic started a price war, and their core product is AF actuator. Japanese enterprises like Nidec, Mitsumi and TDK are large companies, VCM accounts for less than 2% of their revenue, and the losses are huge due to poor cost control. Nidec is the first one to exit the field, Shicoh is losing money, JAHWA and Hysonic see substantial increase in revenue and profit. JAHWA grew especially fast, won over Samsung from Hysonic, and increased the revenue by 167.5%.

In 2011, Apple adopted linear vibration motor which responds over twice faster than conventional motor. Apple has been using conventional vibration motor up to iPhone 4, and started to use linear motor since iPhone 4S. At present, only South Korean Samsung Electro-Mechanics and Bluecom can supply linear motors, and Bluecom cannot make large shipments until 2012. As the capacity of the two companies is limited, it's expected that other manufacturers won't adopt linear vibration motors as Apple does. The performance advantage of linear vibration motor is not obvious, but the cost is slightly higher.

Looking ahead, the prospect of HDD and ODD, the main application markets of micro & special motor, is not promising. The electronic devices in pursuit of thinness, lightness and low power consumption will try not to use HDD. The most popular tablets and Ultrabook use SSD instead of HDD. In the future, conventional light and thin notebooks will also use SSD instead of HDD. In addition, tablets, Ultrabook, light and thin notebooks are not equipped with ODD either. As a result of the popularity of cloud computing, people will increasingly rely on online storage instead of conventional mechanical storage in video and entertainment activities, and the market of conventional ODD will shrink sharply.

Higher-end cars use more micro & special motors. Due to the uncertain economic outlook, more rich people spend their money for consumption instead of investing in industry. The sales volume of high-end cars grows much faster than that of low-end cars, which is most evident in China, the largest car market in the world. China has become the largest luxury car market in the world. Higher-end cars use more micro & special motors, which also makes Japanese automotive micro & special motor manufacturers maintain stable growth despite of the earthquake and yen appreciation. Japanese manufacturers almost occupy 80% of the automotive micro & special motor market.

Revenue of Major Micro & Special Motor Manufacturers, 2009-2011 (USD mln)

Manufacturer	Revenue in 2009	Revenue in 2010	Revenue in 2011
Nidec	6234	7848	8774
Minebea	920	1108	1172
Mabuchi	850	943	988
Johnson Electronics	1080	1157	1288
LG Innotek	198	171	139
SEMCO	312	270	238
Shicoh	157	161	131
Mitsuba	2020	2373	2618
Shinano Motor	400	456	408
Mitsumi	450	513	438
ASMO	2850	3114	3370
Broad-Ocean Motor	210	340	407
Welling Holding	700	1110	1860
Brose	802	1013	1190
JAHWA	43	40	107
HYSONIC	33	25	43

Copyright 2012ResearchInChina

1. Profile of Micro & Special Motor

2. Micro & Special Motor Market

2.1 Overview

2.2 HDD

2.2.1 Current Status and Prospect of HDD Market

2.2.2 HDD Industry and Market

2.3 ODD

2.4 Mobile Phone

2.4.1 Current Status and Prospect of Mobile Phone Market

2.4.2 Mobile Phone Market by Brand

2.4.3 Autofocus Camera Phone

2.4.4 Profile of VCM

2.4.5 VCM Industry

2.5 Micro & Special Motor for Vehicle

2.6 Micro & Special Motor for Air Conditioner

3. Micro & Special Motor Industry

3.1 Overview

3.2 Micro & Special Motor for Mobile Phone

3.3 Micro & Special Motor for Vehicle

4. Micro & Special Motor Enterprises

4.1 Nidec

4.1.1 Nidec Sankyo

4.1.2 Nidec Copal

4.1.3 Nidec Copal Electronics

4.1.4 Nidec Dalian

4.1.5 Nidec Zhejiang

4.1.6 Nidec Techno Motor

4.1.7 Sanyo Seimitsu

4.2 Minebea

4.2.1 Minebea Shanghai

4.2.2 Minebea Zhuhai

4.3 Mabuchi

4.4 Johnson Electric

4.5 Tokyo Parts

4.6 JAHWA Electronics

4.7 LG Innotek

4.8 SEMCO

4.9 Shicoh

4.10 Snatusa

4.11 Mitsuba

4.12 Shinano Motor

4.13 Mitsumi

4.14 C.I.Kasei

4.15 Sanyo Denki

4.16 ASMO

4.17 Brose

4.17.1 Brose Shanghai

4.18 Jinlong Machinery & Electronics

4.19 Zhongshan Broad-Ocean Motor

4.20 Welling Holding

4.21 Hysonic

5. Rare Earth Permanent Magnet Materials

5.1 Overview

5.2 Global Rare Earth Resource Distribution

5.3 Global Rare Earth Resource Supply

5.4 Rare Earth Permanent Magnet Material Industry

5.5 Chengdu Galaxy Magnet

5.6 Beijing Zhongke Sanhuan Hi-Tech

5.7 Yantai Zhenghai Magnetic Material

5.8 Ningbo Yunsheng High-tech Magnetics

5.9 Neomax (Hitachi Metal)

5.10 TDK

- Global Micro & Special Motor Application by Shipment, 2011
- Global HDD Shipment, 1998-2008
- Global HDD Shipment, 2009-2014
- HDD Distribution by Size, 2009-2014
- Global HDD Shipment by Region, 2011
- Market Share of Global HDD Manufacturers by Shipment, Q1 2007-Q2 2010
- Market Share of Global HDD Manufacturers by Shipment, 2011
- ODD Shipment, 2008-2013
- Market Share of Global ODD Manufacturers, 2010
- Global CDMA/WCDMA Mobile Phone Shipment by Region, 2010-2012
- Smart Phone Shipment of Global Mobile Phone Manufacturers, 2010-2011
- VCM Visual
- VCM Profile
- Global Air Conditioner Shipment, 2007-2013
- Market Share of Global Air Conditioner Manufacturers, 2010
- Market Share of Global Mobile Phone Motor Manufacturers, 2010-2011
- Market Share of Automotive Micro & Special Motor Manufacturers, 2010-2011
- Revenue and Operating Margin of Nidec Zhejiang, FY2005-FY2011
- Operating Margin of Minebea Motor Division, Q2 2009-Q4 2011
- Minebea's Sales Volume of Brushless Motor, FY2005-FY2011
- Minebea's Sales Volume of Brush Motor, FY2005-FY2011
- Revenue and Operating Margin of Mabuchi, 2002-2011
- Global Distribution of Mabuchi
- Revenue of Mabuchi by Application, 2009-2011
- Shipment of Mabuchi by Application, 2009-2011

- Mabuchi in China
- Revenue of SEMCO by Division, 2010-2011
- Revenue and Operating Margin of SEMCO OMS Division, Q1 2010-Q4 2011
- Application Distribution of Samsung OMS Division, Q4 2011
- Revenue and Operating Margin of Shicoh Motor, 2005-2010
- Organizational Structure of Shicoh Motor
- Revenue of Snatusa by Application, 2009
- Revenue and Operating Margin of Mitsuba, FY2005-FY2011
- Revenue and Operating Margin of Mitsumi, FY2006-FY2011
- Revenue of Mitsumi by Product, FY2006-FY2010
- Revenue and Operating Margin of Sanyo Denki, FY2006-FY2011
- Revenue of Sanyo Denki by Business, FY2008-FY2011
- Revenue of Brose, 2003-2011
- Revenue and Net Profit Margin of Jinlong Machinery & Electronics, 2006-2011
- Revenue and Net Profit Margin of Zhongshan Broad-Ocean Motor, 2007-2012
- Organizational Structure of Welling Holding
- Revenue and Profit Margin Attributable to Shareholders of Welling Holding, 2005-2011
- Revenue and Operating Income of Hysonic, 2006-2011
- Application Distribution of Global Micro & Special Motor Market (by Value), 2011
- Global Mobile Phone Shipment, 2007-2014
- Global Mobile Phone Shipment and Annual Growth Rate, Q1 2009-Q4 2011
- Market Share of Smart Phone Operating System, 2011
- Global Smart Phone Market Penetration by Region, 2008-2015
- Global Quarterly Mobile Phone Shipment by Brand, 2010-2011
- Global Mobile Phone Shipment by Manufacturer, 2010-2011

- Market Share of Global VCM Manufacturers by Revenue, 2011
- Global Light Vehicle Output by Region, 2010-2012
- Global Light Vehicle Output, 2007-2013
- Supply Relationship of Mobile Phone Motor Industry
- Revenue and Operating Margin of Nidec, FY2006-FY2012
- Revenue of Nidec by Product, FY2008-FY2012
- Revenue of Nidec by Product, Q1-Q3 FY2012
- Precision Motor Revenue of Nidec, FY2009-FY2015
- Revenue and Operating Margin of Small Precision Motor of Nidec, Q4 2010-Q4 2011
- HDD Clients of Nidec, FY2010-FY2011
- Output and Capacity of Six Major HDD Motor Production Bases of Nidec, 2011-2012
- Revenue and Shipment of DC Motor of Nidec, Q4 2010-Q4 2011
- Revenue and Shipment of Fan Motor of Nidec, Q4 2010-Q4 2011
- Revenue of General Motor of Nidec, Q4 2010-Q4 2011
- Revenue and Operating Margin of Machinery Products of Nidec, Q4 2010-Q4 2011
- Revenue and Operating Margin of Electronic and Optical Products of Nidec, Q4 2010-Q4 2011
- Revenue of Nidec by Region, FY2008-FY2011
- Major Production Bases of Nidec
- Nidec Bases in Thailand
- Revenue and Operating Margin of Nidec Sankyo, FY2004-FY2012
- Revenue of Nidec Sankyo by Product, FY2010-FY2011
- Revenue and Operating Margin of Nidec Copal, FY2007-FY2012
- Revenue of Nidec Copal by Application, FY2010-FY2011
- Revenue and Operating Margin of Nidec Copal, FY2007-FY2012
- Revenue of Nidec Copal Electronics by Application, FY2010&FY2012

- Financial Data of Nidec China by Subsidiary, 2008
- Revenue and Operating Margin of Nidec Dalian, FY2005-FY2010
- Revenue and Operating Margin of Minebea, FY2004-FY2012
- Revenue of Minebea, Q1 FY 2010-Q3 FY2012
- Operating Margin of Minebea, Q1 FY 2010-Q3 FY2012
- Revenue of Minebea by Product, Q2 2009-Q4 2011
- Sales of Minebea Motor Division, Q2 2009-Q4 2011
- Revenue of Mabuchi Automotive Division by Product, 2009-2011
- Revenue of Mabuchi Audio & Visual Equipment Division by Product, 2009-2011
- Revenue of Mabuchi Optical & Precision Instrument Division by Product, 2009-2011
- Revenue of Mabuchi Home Appliances Tools Toys Division by Product, 2009-2011
- Revenue of Mabuchi by Region, 2009-2011
- Output of Mabuchi by Subsidiary, 2009-2011
- Revenue and Operating Margin of Johnson Electric, FY2003-FY2012
- Revenue of Johnson Electric by Product, FY2009-FY2012
- Revenue of Johnson Electric by Region, FY2009-FY2012
- Revenue and Operating Margin of JAHWA Electronics, 2005-2012
- Revenue of JAHWA Electronics by Product, 2005-2012
- Overseas Subsidiaries of JAHWA Electronics
- Revenue and Operating Margin of LG Innotek, 2006-2011
- Revenue of LG Innotek by Product, Q4 2010-Q4 2011
- Motor Business Revenue of LG Innotek, Q4 2010-Q4 2011
- Application Distribution of LG Innotek Motor, Q4 2011
- Revenue and Operating Income of SNATUSA, 2005-2010
- Financial Data of Mitsuba China by Subsidiary, 2008

- Financial Data of Mitsumi China by Subsidiary, 2008
- Revenue and Operating Margin of ASMO, FY2007-FY2012
- Financial Data of ASMO China by Subsidiary, 2008
- Revenue of Brose by Business, 2011
- Sales Volume of Welling Holding, 2009-H1 2011
- Global Rare Earth Resource Distribution by Region, 2011
- Global Rare Earth Supply, 1956-2008
- Global Rare Earth Capacity outside China, 2011
- Revenue and Operating Margin of Chengdu Galaxy Magnet, 2007-2011
- Revenue of Chengdu Galaxy Magnet by Application, 2007-2011
- Operating Income of Chengdu Galaxy Magnet by Application, 2008-2010
- Gross Margin of Chengdu Galaxy Magnet by Product, 2008-2010
- Revenue of Chengdu Galaxy Magnet by Region, 2010
- Revenue and Operating Margin of Beijing Zhongke Sanhuan Hi-Tech, 2005-2011
- Gross Margin of Beijing Zhongke Sanhuan Hi-Tech, Q4 2006-Q3 2011
- Financial Data of Beijing Zhongke Sanhuan Hi-Tech by Subsidiary, 2010
- Revenue of Yantai Zhenghai Magnetic Material, 2008-Q3 2011
- Net Income of Yantai Zhenghai Magnetic Material, 2008-Q3 2011
- Revenue of Yantai Zhenghai Magnetic Material by Application, 2010-Q3 2011
- NdFeB Revenue and Gross Margin of Ningbo Yunsheng High-tech Magnetics, 2005-2011
- Revenue and Operating Income of Hitachi Metal by Division, FY2010-FY2011
- Producing Areas of Neomax
- Revenue and Operating Income of TDK, FY2005-FY2012
- Revenue of TDK by Application, Q1 FY2011-Q3 FY2012
- Revenue of TDK by Product, Q4 FY2011

- 
- Magnetic Head Revenue of TDK, Q1 2011-Q1 2012
 - TDK's Production Bases of Magnetic Materials

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

Hard copy2,600 USD
PDF (Single user license)2,500 USD
PDF (Enterprisewide license) 3,700 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.