Global and China Automotive Electric Motor Industry Report, 2011-2012

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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 China Association of Automobile Manufacturers, National Bureau of Statistics of China and WIND Database etc.

Abstract

The report highlights the followings:

- Brief introduction to automotive electric motor
- Global and China automotive market
- Global and China automotive electric motor market
- 21 leading automotive Electric Motor Manufacturers

The automotive electric motor divides into two categories: motor and starter & alternator. The global automotive electric motor market scale approximated USD20.4 billion in 2011 and would win about USD22.4 billion in 2012.

The auto motor, by the position to be mounted, falls into three groups: a) body motor (with air-conditioning included); b) powertrain motor; c) chassis motor. The auto body, especially for limousines, requires installing the largest number of motors but with a very low unit price. Taking a limousine for example, up to 12 power seat motors are required, 6 (or maybe only two to three ones in future) mirror motor are wanted, and 4 stepping motors for headlights are needed. In 2011, the shipment of auto body motor hit roughly 1.531 billion units, while the figure in 2012 is expected to soar to 1.713 billion units. Thus, it can be seen that the limousine market is the driving engine of auto electric motor industry.

Although it is less demanded, the unit price of powertrain motor is far higher than that of auto body motor. In 2011, the powertrain motor shipment arrived at 427 million units, with the targeted figure in 2012 hitting 470 million. Common powertrain motors include electric steering motors, electric fuel pump, variable valve timing, throttle control, EPS and ABS motor. In particular, electric steering motors, electronic throttle control motor and EPS witness the rapidest growth.

Revenue of Major Auto Small-Sized Motor Manufacturers, 2011-2012 (USD mln)

	2011	2012E
Nidec	1,125	1,250
Mabuchi	514	618
JohnsonElectric	1,338	1,502
Mitsuba	2,534	2,708
ASMO	3,393	3,798
Brose	958	1,082
VALEO	258	260
Inteva	360	330
Bosch	1,068	1,150

Source: RIC <Global and China Automotive Electric Motor Industry Report, 2011-2012>

Mabuchi ranks No.1 in terms of shipment, but the major contributor comes from auto body motor. In 2012, the shipment of Mabuchi is estimated to reach 700 million, but the revenue is no more than USD618 million; Nidec is the first largest manufacturer of electric steering motors; and Hong Kong-based Johnson Electric focuses on European market, with the market occupancy of over 80% in automotive air-conditioning and water pump motor domains.

As an affiliated company of Honda, Mitsuba is the major motor supplier of Honda; ASMO, stemming from Japan-based Denso, is the world's largest auto motor manufacturer with the most competitive edge in both auto body motor sector and powertrain motor sector; Brose mainly produces power window motor and power seat motor in the wake of its acquisition on Germany-based Continental's auto door system division; Valeo sold its motor business to Nidec in 2006, but it kept the windshield wiper motor manufacturing and still boasts the world's largest windshield wiper producer; Inteva originated from auto door and roof business division under Delphi; Bosch is mainly engaged in the production of powertrain motor besides windshield wiper motor business.

In the starter & alternator field, Valeo, Denso, Bosch and Remy are the four monopolists. Denso is the world's largest starter & alternator producer with the clients covering all Japanese businesses and America-based GM; next only to Denso, Valeo's clients mainly distribute in Europe and Chinese Mainland; Bosch specializes in the production of starters and alternators for diesel engines; Remy dives into North American market.

There are 62 starter & alternator manufacturers in China, of which, 14 ones realize the sales volume over 1 million units. Many of these manufacturers focus on diesel engine market and aftermarket, while only a few tap into passenger car OE market. The major industrial players include Shanghai-based S.Valeo, Denso Tianjin, Jinzhou Halla Electrical Equipment, Hubei Super-Elec Auto Electric Motor, Chengdu Huachuan Electric Parts Co., Ltd., Changsha Hitachi, Chongqing Bright, Changsha Bosch, etc. In addition, leading producers involved in the production of alternators for commercial vehicles include Prestolite Electric (Beijing) Ltd, Zhejiang Dehong Automotive Electronic & Electrical Co., Ltd., Wuxi Minxian Vehicle Electric Equipment Co., Ltd, Hubei Remy, Changsha Qidian Automotive Products Co., Ltd., Shandong Lifan Automotive Industry Co., Ltd, etc.

None but Toyota made a success in the development of strong hybrid electric vehicle. Without assistance from other counterparts, Toyota independently overcame the know-how from IGBT controlled by motor to permanent magnet brushless AC synchronous motor which is the key. The case is the same for Mitsubishi and Nissan, which produced all the motor components by themselves. Thus, there are no independent suppliers of motors for strong hybrid electric vehicles and pure EVs.

There are independent suppliers of ISG (BSG) motors for weak hybrid electric vehicles, with leading manufacturers including Bosch, Valeo, Remy, Denso, Mitsubishi and Lucas. ISGF is the two-in-one of starter and alternator. Therefore, it is with great difficulty to tap into ISG motor industry in case of no technical background regarding starters and alternators. For domestic weak hybrid electric sedan producers, they intend to import motors from America-based Remy due to the highly sophisticated products and relatively low price.

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