Global and China Automotive Electric Motor Industry Report, 2016-2020

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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 include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2015, the global automotive market continued to grow, with the total sales volume hitting 89.68 million units, up 2.0% year on year. It is anticipated that the numbers will reach 91.3 million units in 2016 and approach 105 million units in 2020. Specifically, China, as the world's largest automobile market, contributed the sales volume of 24.6 million units in 2015, sharing 27.4% of the global total; and the sales figure is expected to rise to 26 million units in 2016, with an estimated AAGR of around 5.0% during 2016-2020.

In 2015, the global automotive electric motor shipments approximated 3.47 billion units, up 6.7% from a year ago; the figure will go up to 3.64 billion units in 2016. With the development of intelligent and new energy vehicles, the global shipments of automotive electric motor are expected to grow at a compound annual rate of around 9.0% during 2016-2020. By installation position, automotive electric motors can be divided into body motors, chassis motors, and powertrain motors, of which body motors find widest applications, including in power seats, electric windows, and electric rearview mirrors, etc. On average, one car needs about 24 units of body motor. In 2015, the global shipments of automotive body motor totaled 2.16 billion units, accounting for 62.3% of those of automotive electric motor. We project that the figure will rise to 2.31 billion units in 2016 and 3.18 billion units in 2020.

Automotive electric motors mainly fall into small-sized automotive electric motors, automotive starters and generators according to function.

Globally, relatively more competitive manufacturers of small-sized automotive electric motors consist of Japan's ASMO, Mitsuba, Nidec, Mabuchi, and Denso, etc., and some European and American companies like Valeo and Bosch. Besides, the Chinese player Johnson Electric also enjoys strong competitiveness in the international market, seizing a market share of around 10% in 2015.

As a key manufacturer of small-sized automotive electric motors such as ETC motor, EPS motor, and wiper motor, Mitsuba launched a drive motor for small-sized electric vehicles in January 2016. In April 2016, the company invested EUR13.5 million in expanding production capacity of wiper components at Hungary plant. The expansion is expected to be completed in 2017, when 90% of the capacity will be for export.

As China's largest manufacturer of small-sized automotive electric motors, Johnson Electric is developing towards smaller and more lightweight products to gradually satisfy the market requirements on the vehicle's energy saving & emission reduction and fuel efficiency improvement. For instance, the company's power windows adopt "Curve" motor technology, thus leading to a 30% reduction both in volume and weight.

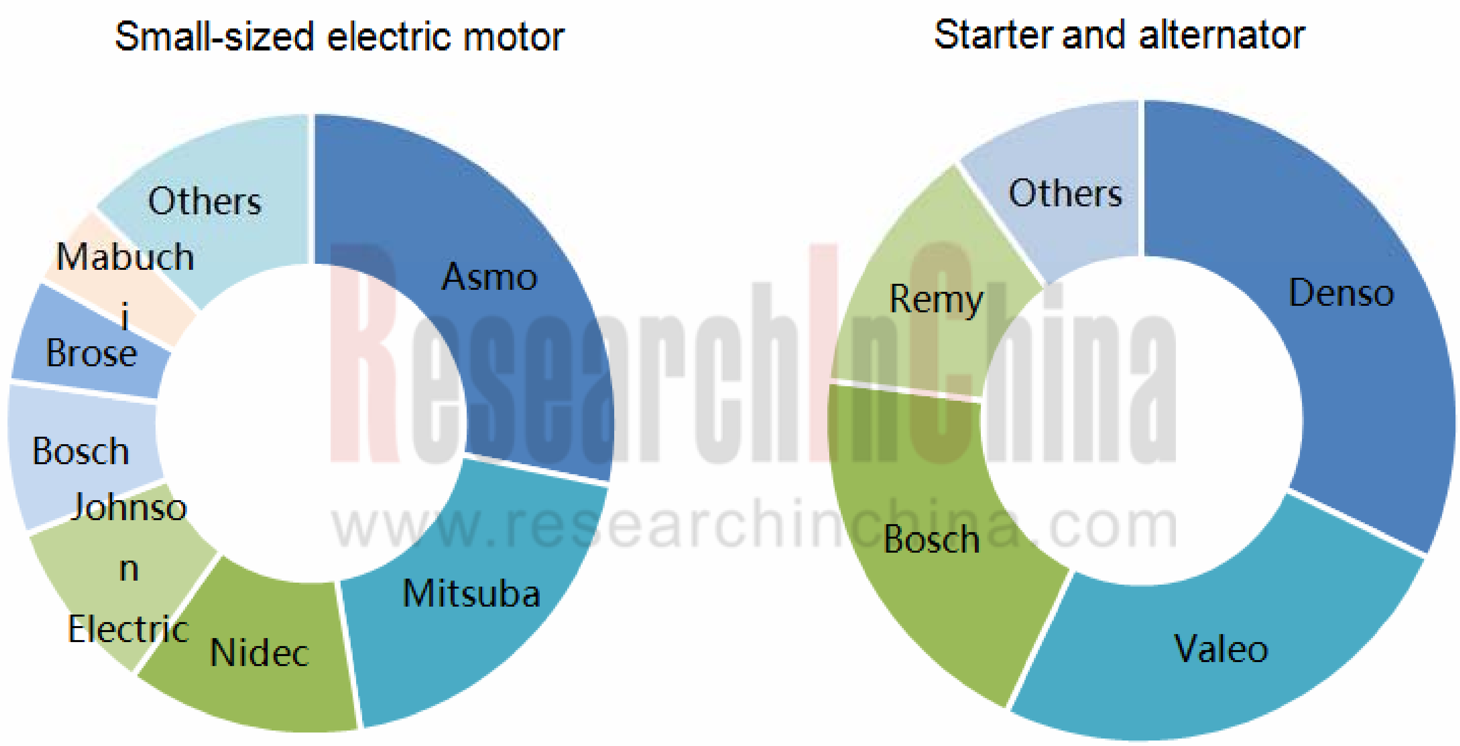
Global starters and alternators have higher level of market concentration, and leading producers include Valeo, Denso, Bosch, and Remy, which held an aggregate market share of around 90% in 2015. Among these companies, Valeo's business is concentrated in China and Europe while Denso focuses on the Japanese market.

As one of the major suppliers of automotive starter and alternators, Valeoboasts a market share of about 30%. The company entered China in the 1980s and set up production bases of wiper motors and starters & alternators in Shanghai, with the annual capacity of 1.8 million units and 15 million units, respectively. And the starters and alternators can be used to support cars, light-duty trucks, and diesel engines, etc.

The report is primarily concerned with the following:

- Market size, industry landscape, etc. of global and Chinese automobile industry;
- Market size, market structure, etc. of automotive electric motor industry;
- Market size, competitive landscape, etc. of small-sized automotive motors, automotive starters and alternators, as well as motors for new energy vehicles;
- Operation, automotive electric motor business, etc. of 21 global automotive electric motor manufacturers.

Competitive Landscape of Global Automotive Electric Motor Market, 2015



Source: *Global and China Automotive Electric Motor Industry Report, 2016-2020* by ResearchInChina

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