Global and China Automotive Electric Motor (Small Motor/ Starter and Generator/ NEV Motor) Industry Report, 2017-2021

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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

Global automobile production and sales have been on the steady rise in recent years, arriving at 94.977 million units and 93.856 million units in 2016, respectively, a year-on-year rise of 4.7% for both, and are expected to reach 96.90 million units and 95.60 million units separately in 2017. As the world's largest automobile market, China recorded 26.00 million units in production and 25.84 million units in sales in the first eleven months of 2017, up 3.9% and 3.6% over the same period of last year. Full-year figures expectedly reach 28.75 million units and 28.57 million units, occupying 29.7% and 29.9% of the world's total, respectively.

Thanks to steady growth of the automobile market, global automotive motor shipments totaled about 3.713 billion units in 2016 and are expected to reach 3.969 billion units in 2017. As automobile goes intelligent and new energy vehicles develop, the world's automotive motor shipments will maintain a rapid growth rate, hitting an estimated 5.61 billion units in 2021.

Body motor takes the lion's share, as roughly 24 units are used on each car on average. Global shipments of body motor were approximately 2.31 billion units, 62.2% of total automotive motor shipments. As car configurations become more advanced, body motor use will continue to rise, attaining 30 units per vehicle in 2021 when worldwide body motor shipments are projected to hit 3.21 billion units.

Functionally, automotive motor is primarily divided into starter, generator and small motor. Global small automotive motor market is dominated by ASMO, Mitsuba, Nidec, Mabuchi and Johnson Electric. ASMO topped the list with a market share of 28.1% in 2016, followed by Mitsuba (19%). The world's starter and generator market is occupied by Valeo, Denso, Bosch and Remy. Denso and Valeo held a combined 56.9% share of global starter and generator market in 2016.

In the wake of a surge in production and sales of new energy vehicles, the NEV drive motor market also booms. Global NEV drive motor market was up to USD2.15 billion in 2016 and is predicted to reach USD5 billion in 2021.

The Chinese NEV drive motor market was worth RMB6.523 billion in 2016 with drive motor installations (excluding HEV) of 561,672 units including 348,704 units or 62.1% for passenger cars, 27% for buses and 10.9% for special-purpose vehicles.
BYD seizes the highest share in the Chinese NEV drive motor market. However, motor experts represented by Shanghai E-drive, UAES, JEE Automation Equipment, Shandong Deyang Electronics Technology and Jing-Jin Electric also control a larger share.

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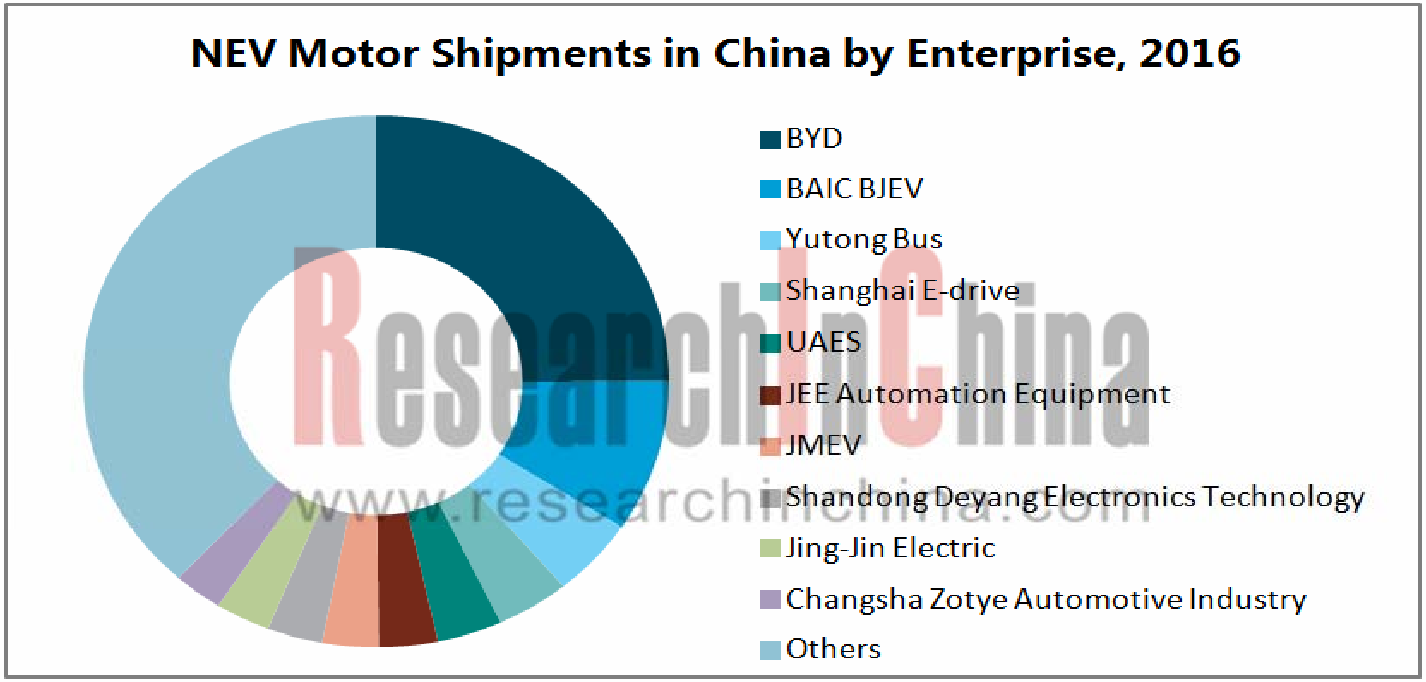
Global and China Automotive Electric Motor (Small Motor/ Starter and Generator/ NEV Motor) Industry Report, 2017-2021 highlights the followings:

◆Overview of global and Chinese automobile market (automobile (passenger car, commercial car and NEV) production & sales);
◆Automotive motor market (market size/structure);
◆Automotive motor market segments (small automotive motor, starter, generator, NEV motor);
◆Nine foreign and 18 Chinese automotive motor companies (operation, automotive motor business).



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