China EV (Electric Vehicle) Motor Controller Industry Report, 2018-2022

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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.

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Abstract

Motor drive control system (including drive motor and motor controller) is an important execution mechanism when an EV runs, and its control & drive properties decide main diving performance indicators. Each battery electric vehicle or hybrid vehicle needs a set of motor drive control system.

Motor controller prices vary greatly depending on specifications and performance requirements. The market price of motor controller for electric bus is usually RMB30,000-50,000/set (around RMB45,000/set on average), of single-motor controller for electric truck RMB6,000-7,000/set or so, of single-motor controller for passenger car RMB7,000/set, and of multi-motor controller for passenger car RMB10,000-12,000/set. As the dual-motor design can simplify plug-in hybrid system and improve driving performance (like BMW 2 Series PHEV, Toyota Prius, BYD Tang, and BYD Yuan), the proportion of EVs (PHEV in particular) carrying dual-motor system will be on a steady rise.

China's demand for EV motor controllers was around 870,000 sets or worth RMB11.7 billion or so in 2017, up 34.6% and 29% year on year, respectively. It is expected that EV motor controller market size will climb to RMB26.7 billion in 2022 with passenger car holding a dominant position, propelled by NEVs and conventional hybrids.

The Chinese EV motor controller market is dominated China-made brands, while foreign brands hold fractional share at the stage of market fostering and early development due to higher prices. Chinese companies fall into two parts: EV makers that produce EV motor controllers generally for its own vehicles; EV parts companies that produce EV motor controllers for specific or non-specific carmakers.

Some automakers may ramp up efforts for R&D of motor electronic control and produce products by themselves after mastering the know-how; however, a great many carmakers without such capability still choose third parties to supply products. Hence, the companies with core technologies, experience in mature products, and good cost control will be main beneficiaries.

Prices will trend down throughout the industry, so does the gross margin of major producers, as the competition in the EV motor controller market is possible to prick up along with a quicker R&D progress & launching of mature products of Chinese EV motor controller producers as well as deep involvement of foreign-funded enterprises. In addition, as subsidies decline, the cost transfer of carmakers will also have a big impact on prices.

EV Motor Controller Demand and Market Size in China, 2015-2022E

	Year	2015	2016	2017	2018E	2019E	2020E	2021E	2022E
Commercial Vehicle	Average unit price of motor controller for electric bus (RMB/set)	45,000	42,000	40,000	38,000	36,000	35,000	31,000	25,000
	Electric bus sales (unit)	96,000	121,000	146,000	179,000	205,000	235,000	263,470	297,885
	Electric bus motor controller market size (RMB bn)	4.3	5.1	5.84	6.8	7.38	8.23	8.17	7.45
	Average unit price of single-motor controller for electric truck (RMB/set)	7,000	6,600	6,200	5,800	5,500	5,200	5,000	4,700
	Electric truck sales (unit)	28,000	50,000	65,000	85,000	110,000	145,000	173,296	194,756
	Electric truck motor controller market size (RMB mln)	200	330	400	490	605	754	867	915
Passenger Car	Average unit price of single-motor controller for electric passenger car (RMB/set)	7,500	7,000	6,600	6,200	6,000	5,800	5,400	5,000
	Average unit price of multi-motor controller for electric passenger car (RMB/set)	12,000	11,000	11,000	10,000	10,000	9,000	8,500	8,300
	EV sales (unit)	146,719	244,763	448,835	766,573	1,041,047	1,229,069	1,452,317	1,832,796
	PHEV sales (unit)	60,663	80,352	107,573	125,750	318,589	525,458	784,144	926,574
	HEV sales (unit)	13,187	60,168	139,671	343,958	646,297	913,270	1,113,279	1,412,578
	Passenger car motor controller market size (RMB bn)	1.8	3.7	5.5	7.31	9.42	12.14	15.47	18.36
Overall	Motor controller market size (RMB bn)	6.3	9.1	11.74	14.6	17.405	21.124	24.507	26.725
	YoY (%)		44.9%	29.0%	24.4%	19.2%	21.4%	16.0%	9.1%

Note: Passenger car multi-motor controller refers to mainly TM+ISG dual-motor controller, front and rear dual-TM motor controller, or front and rear dual TM+ISG tri-motor controller.

Source: ResearchInChina

China EV (Electric Vehicle) Motor Controller Industry Report 2018-2022 highlights the followings:

◆Main technical routes and development trends of EV motor controller;

◆Upstream IGBT & thin-film capacitor and downstream EV industry (market size, competitive landscape, main policies, etc.);

◆EV motor controller (industrial policy, market size, supply chain, and competitive landscape), global mainstream EV motor electronic control systems;

◆19 Chinese EV motor controller producers (operation, motor controller business and technology, etc.);

◆6 global IGBT vendors (operation, business in EV field, etc.);

◆8 global automotive inverter companies (operation, business in EV field, etc.).

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