



**Global and China Automotive Electric  
Motor (Small Motor, Starter, Generator and  
NEV Motor) Industry Report, 2018-2023**

**September 2018**

## **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 output reached 97.30 million units in 2017, a 2.4% rise from a year ago, and is expected to sustain a growth rate of around 2.0% over the next five years. As the world's biggest producer of automobiles, China made 29.02 million units in 2017, up 3.2% year on year and accounting for 29.8% of the global total.

With the evolution of the automobile industry and automotive technology, electric motor is replacing traditional mechanical system. Global automotive motor shipments approximated 3.99 billion units in 2017, representing a CAGR of 6.9% between 2013 and 2017. As automobile goes intelligent and NEV develops, the world's automotive motor shipments will maintain an average annual rate of 7.5% or so during 2018-2023.

Automotive motors are mainly distributed in body, engine and chassis. The most used car-body motors, including power seats, power windows/doors and electric rearview mirrors, are largely small motors.

Global car body motor shipments were 2.49 billion units in 2017, occupying 62.4% of total automotive motor shipments. Around 50% share of the world's small motor market was taken by ASMO and Mitsuba in 2017.

About 90% share of the global automotive starter and generator market is seized by Valeo, Denso, Bosch and Remy. Denso, the world's largest producer of automotive starters and generators, serves Japanese carmakers and U.S. GM. Second only to Denso, Valeo provides services for customers chiefly in Europe and Mainland China.

As NEV develops, the drive motor market has been growing by leaps and bounds in recent years. Global NEV drive motor market was worth about \$2.61 billion in 2017, an upsurge of 21.4% over the previous year, and is predicted to maintain a growth rate of over 20.0% during 2018-2023.

The Chinese NEV motor market was roughly RMB8.79 billion in 2017 with new energy passenger car motor installations seizing more than 60.0%.

BYD and BAIC BJEV have certain advantages, each sharing at least 10% of the country's total drive motor shipments.

Global and China Automotive Electric Motor (Small Motor/ Starter and Generator/ NEV Motor) Industry Report, 2018-2023 focuses on the followings:

- ◆Automobile output and sales in China and worldwide;
- ◆Automotive motor market (overview, market size/structure, etc.);
- ◆Automotive motor market segments (small motor, starter, generator, and NEV motor) (market size, competitive landscape, market structure, etc.);
- ◆9 foreign and 18 Chinese automotive motor producers (operation, automotive motor business, etc.)

### Global Automotive Motor Shipments, 2013-2023E



Source: ResearchInChina

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