



China Electric Vehicle Drive Motor Industry Report, 2018-2022

December 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

The Chinese market size of electric motors and motor controllers posted RMB20.2 billion in 2017 and is projected to approach RMB30 billion in 2020. The market will be expanding if the integrated electric drive solutions grow popular and the three including electric motor, reducer and motor controller are increasingly fused into one or if the N-to-1 integration of functions like electric motor, reducer, motor controller, DC/DC and power distribution unit is brought into a reality, at which the majority of electric motor and motor controller companies are attempting.

In the first half of 2018, a total of 405,000 electric motors were equipped by more than 160 suppliers to the new energy vehicle (NEV) in China. Despite there are numerous firms in the electric motor market for the moment, the electric motor market concentration is on a rapidly rise in 2018 judging from installations.

In the first half of 2018, the top ten players by motor shipments held a lion's share of 71.53% together, a jump of 13.97 percentage points from the same period of 2017. Elaborately, the highest installation touched 94,500 units, while over 110 firms were each with motor shipment of less than 1,000 units. As the market concentration climbs, the gap between motor companies is broadening. Besides the automakers that supply electric motors by themselves, such competitors are growing advantageous, as United Automotive Electronic Systems (UAES), JEE Automation Equipment, Jing-Jin Electric Technologies, Shanghai Edrive, and Zhejiang Founder Motor.

Most Chinese electric motor and motor controller manufacturers have sprung up from the new energy commercial vehicle market with a low entry barrier and harboring numerous enterprises. While the market becomes concentrated and subsidies descend, the electric motor makers are confronted with the amounting pressure from the rising prices of raw materials and a fall in profits.

By types, permanent magnet synchronous motor plays a key part in the electric motor market, with its installations (mainly for passenger cars) finding a 78.4% share in all motor installations to new energy vehicle in China in 2017, asynchronous AC motor swept 21.5% by installations and got primarily utilized in commercial vehicle, and other types of electric motors seized 0.1% or so. Permanent magnet synchronous motor is currently the best choice for electric passenger cars and sees a burgeoning market share.

In general, competition between electric motor and motor controller suppliers will prick up and gross margin of products will be volatile as the subsidies for new energy vehicle are going down in the next a few years. In the medium term, the industrial pattern will remain unchanged in Chinese new energy vehicle market (key roleplaying by automakers as well as the battery, electric motor and motor controller producers as the suppliers of core components).

Top 10 Drive Motor Companies by Installations and Key Automakers Supported, 2018H1

Motor Company	Motor Installation (unit)	Motor Controller Firm
BYD	94,533	BYD
BAIC BJEV	50,045	BAIC BJEV
UAES	33,008	SAIC Motor Passenger Vehicle
JEE Automation Equipment	23,159	JAC, Chery, YUDO
Jing-Jin Electric Technologies	21,959	GAC, Haima Motor, Geely
JMEV	17,125	JMC
Zhuhai Enpower Electric	15,125	JAC iEV6E, LIFAN
Huayu Automotive Systems	14,520	SAIC Motor Passenger Vehicle
Shanghai Edrive	10,636	Chery, ZD
Zhejiang Founder Motor	9,748	Geely, SAIC GM Wuling

Source: GBII; ResearchInChina

The report highlights the following:

- ◆ Development of new energy vehicle (NEV) drive motor industry in China (including industrial chains, cost analysis, business model, competitive landscape and key players competing each other, and elaboration on competitive patterns of passenger vehicle and commercial vehicle drive motors), and analysis on status quo and development tendencies of drive motor technologies;
- ◆ 22 Chinese and 6 global drive motor companies (operation, development strategy, supply chain, NEV drive motor business, etc.);
- ◆ New energy vehicle (NEV) drive motor industry (definition and classification of vehicle drive motors, analysis on upstream and downstream industry chains);
- ◆ Environments for industry operation (policy climate, NEV market development and impact to the vehicle drive motor industry).

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