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Global Automotive Iron Core Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Iron Core market size was valued at US$ 4473 million in 2025 and is forecast to a readjusted size of US$ 8204 million by 2032 with a CAGR of 8.9% during review period.

Automotive Iron Core refers to the precision magnetic core components used in automotive traction and drive motors, with stator cores and rotor cores constituting the principal product forms covered by this study. These components are typically manufactured from non-grain-oriented electrical steel through high-speed precision stamping, lamination stacking and fixation processes such as interlocking, welding, bonding or other mechanical joining methods. Product performance is closely related to electrical-steel grade and thickness, stamping accuracy, stacking factor, dimensional consistency, core loss, magnetic flux density and mechanical stability under high rotational speeds. The market primarily serves electric and electrified vehicle powertrains, including BEV, PHEV, EREV, HEV, MHEV and FCEV applications, and covers motor cores used in permanent-magnet synchronous, induction and other automotive traction motor architectures. The research focuses on commercially supplied automotive drive-motor stator and rotor cores and their associated precision lamination technologies, where manufacturing capability directly influences motor efficiency, power density, thermal performance, NVH and overall drivetrain reliability.

Key Findings

Automotive Iron Core demand is increasingly linked to the continued electrification of passenger and commercial vehicle powertrains

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Stator cores and rotor cores remain the two fundamental product categories in automotive traction motor applications

China represents the most important demand and manufacturing cluster, supported by its large-scale electrified vehicle industry

Thin electrical steel, precision stamping and bonding technologies are becoming increasingly important for high-efficiency and high-speed motors

Competition increasingly depends on tooling capability, process know-how, customer qualification, localized capacity and large-scale manufacturing

Market Trends

The Automotive Iron Core industry is moving toward thinner electrical-steel laminations, higher dimensional precision, lower iron loss and more advanced stacking technologies as automotive traction motors evolve toward higher rotational speeds, higher power density and improved energy efficiency. Conventional interlocking and welding processes remain widely used, while adhesive bonding and self-bonding technologies are receiving greater attention because reducing mechanical deformation and interlayer gaps can improve stacking quality and magnetic performance. POSCO Mobility Solution has commercialized and developed EMFree and self-bonding approaches, while Tempel has introduced full-surface bonding technology for motor laminations. Chinese suppliers are also extending their capabilities into thin-gauge electrical steel, bonded cores and motor-core assemblies designed for high-voltage and oil-cooled drive motors. At the same time, motor-core manufacturers are moving beyond simple stamping toward integrated engineering covering precision dies, lamination forming, stacking, rotor assembly and stator-related components, increasing the importance of co-development capabilities with traction-motor customers.

Market Dynamics

Drivers

The primary demand driver for Automotive Iron Core is the structural increase in electrified vehicle production. Electric vehicles represented a rising share of global vehicle sales in 2025 and 2026, while BEV, PHEV and hybrid architectures continue to

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expand across major automotive markets. Each electrified drivetrain requires high-precision magnetic components, directly linking motor-core demand to traction-motor production. The simultaneous transition toward higher-efficiency motors, higher-speed operation, higher-voltage platforms and compact e-drive systems further increases technical requirements and value creation opportunities for qualified core manufacturers.

Restraints

Automotive Iron Core manufacturing remains capital-, tooling- and process-intensive. High-volume programs require precision progressive dies, dedicated high-speed presses, automated stacking and inspection systems, while thinner electrical steel raises challenges in stamping stability, burr control, deformation management and material utilization. Raw-material cost and availability, particularly for high-grade non-grain-oriented electrical steel, can also influence production economics. In addition, automotive qualification cycles are relatively long, making it difficult for new entrants to rapidly convert nominal production capacity into stable commercial supply.

Opportunities

The strongest opportunities are shifting toward higher-performance drive-motor programs rather than simple capacity expansion. Demand for thin-gauge laminations, low-loss cores, self-bonded or adhesive-bonded structures, skewed rotor stacks and highly integrated stator/rotor assemblies is creating additional differentiation. High-voltage platforms, oil-cooled motors and applications requiring higher speed and power density are raising the technical content of Automotive Iron Core products. Regional localization also provides opportunities for manufacturers capable of duplicating qualified processes across multiple production bases and supplying global automotive customers near their vehicle or motor plants.

Challenges

The industry faces increasing pressure to simultaneously achieve lower cost, higher precision and faster product industrialization. Automotive customers require consistent core loss, dimensional accuracy, stack height, bonding or welding strength and high-speed mechanical reliability across very large production volumes. Meanwhile, rapid changes in motor architecture and vehicle platforms can shorten product cycles and

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increase tooling investment risk. Suppliers must therefore balance capacity expansion with customer-specific tooling, process flexibility and utilization rates, while maintaining automotive-grade quality systems and supply-chain resilience.

Industry Chain Analysis

The Automotive Iron Core industry chain begins with non-grain-oriented electrical steel, insulation coatings, bonding materials, precision tooling materials and specialized stamping and automation equipment. High-performance electrical steel is particularly important because sheet thickness, magnetic loss characteristics and mechanical properties affect both motor efficiency and manufacturability. The midstream manufacturing process centers on precision die development, slitting or material preparation, high-speed stamping, stator and rotor lamination forming, stacking, interlocking, welding or bonding, dimensional inspection and, for selected programs, further integration with magnets, shafts, cast-aluminum rotors or stator assemblies. POSCO Mobility Solution, for example, identifies motor cores as stator-and-rotor assemblies whose design and manufacturing quality directly influence e-motor efficiency, while suppliers such as Tongda have developed integrated stamping, stacking, welding and bonding capabilities for new-energy vehicle programs.

Downstream customers mainly consist of traction-motor manufacturers, electric-drive system suppliers and automotive OEMs. Value creation is progressively shifting from basic lamination processing toward precision tooling, process engineering, low-loss stacking technology, automated quality control and localized mass-production capability. Electrical steel represents an important cost component, but competitive profitability is also influenced by stamping yield, scrap control, die life, equipment utilization and the ability to amortize dedicated tooling over large automotive programs. Manufacturers capable of participating early in motor design and subsequently transferring validated processes into high-volume production generally occupy a stronger position in the value chain.

Segment Insights

By product structure, stator cores and rotor cores constitute the fundamental Automotive Iron Core segments. Their manufacturing processes share electrical-steel stamping and stacking technologies, but product requirements differ substantially in slot geometry, concentricity, rotor mechanical strength, magnet accommodation and high-speed stability. Permanent-magnet traction motor cores represent an important

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mainstream technology direction, while induction and other motor architectures maintain applications in selected vehicle platforms. Chinese manufacturer Tongda indicates that permanent-magnet structures account for the majority of its new-energy vehicle drive-core products, while induction structures are also supplied, illustrating the coexistence of multiple motor technologies within the market.

From a manufacturing-process perspective, conventional interlocked and welded cores continue to support large-volume automotive programs, whereas bonded and self-bonded cores are becoming a higher-value technology segment. The latter can reduce localized mechanical stresses and interlaminar gaps and is increasingly relevant where customers prioritize lower core losses, higher motor efficiency and improved NVH. Consequently, future product differentiation is expected to depend less on whether a supplier can perform conventional stamping and more on its capability to process thinner materials, control precision at scale and industrialize advanced stacking technologies.

Downstream Market Opportunities

Electrified passenger vehicles remain the principal downstream opportunity for Automotive Iron Core, while commercial vehicles, hybrid platforms and range-extended vehicles provide additional demand diversity. The expansion of high-voltage electric architectures, high-speed traction motors and oil-cooled systems is increasing requirements for thin electrical steel, low core loss, precise stack geometry and reliable bonding. At the same time, vehicle manufacturers continue to diversify powertrain architectures rather than converging on a single motor design, creating opportunities for suppliers with flexible tooling and production systems capable of supporting permanent-magnet, induction and other traction-motor configurations. Commercial vehicle electrification also broadens the addressable market for larger-diameter and higher-output motor cores.

Regional Insights

China is the most important demand and manufacturing center for Automotive Iron Core, supported by the scale of its electrified vehicle industry and an established local supply chain for electrical steel, precision dies, motor laminations and complete electric-drive systems. Electric cars represented close to 55% of new-car sales in China in 2025, and China accounted for around six out of ten electric cars sold globally, providing a substantial downstream production base for automotive motor-core

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suppliers. The domestic supplier structure ranges from specialized precision-core manufacturers to diversified motor-component producers with integrated tooling, stamping, stacking and assembly capabilities.

Europe, Japan, South Korea and North America remain strategically important markets because of their established automotive and electric-motor industries and the presence of major global Automotive Iron Core suppliers. Localization is becoming increasingly important: Mitsui High-tec operates a multi-region production strategy spanning Japan, China, Europe and the Americas, while Worthington Steel strengthened its European electric-motor lamination position through its controlling investment in Sitem Group. The broader industry direction is therefore toward production networks located closer to vehicle and traction-motor manufacturing clusters rather than highly centralized export-only supply models.

Competitive Landscape Analysis

The Automotive Iron Core market has a mixed competitive structure consisting of globally established precision lamination specialists, steel-group-affiliated motor-core manufacturers and increasingly capable Chinese precision-stamping companies. Mitsui High-tec and EuroGroup Laminations have developed international production footprints focused on automotive motor laminations; Tempel combines electrical-steel lamination expertise with expanding bonding technologies and a broader international manufacturing network; POSCO Mobility Solution combines access to electrical-steel expertise with dedicated traction motor-core technology; while Chinese companies such as Xinzhi Group, Zhenyu Technology, Tongda Silicon Steel and other confirmed domestic suppliers compete through high-volume precision stamping, integrated tooling and increasingly sophisticated bonding and assembly processes. Competition is therefore not determined solely by nominal production capacity. Automotive customer qualification, precision-die development, thin-sheet processing, material utilization, stacking technology, automation, global plant replication and the ability to maintain consistent quality across large-volume programs increasingly determine supplier positioning. The market is also showing a gradual shift from standalone stamped laminations toward higher-value motor-core and stator/rotor subassemblies, which may further differentiate suppliers with deeper engineering and system-integration capabilities.

Report Scope

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This report is a detailed and comprehensive analysis for global Automotive Iron Core market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive Iron Core market size and forecasts, in consumption value ($ Million), 2021-2032

Global Automotive Iron Core market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global Automotive Iron Core market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global Automotive Iron Core market shares of main players, in revenue ($ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive Iron Core

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Iron Core market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of

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this study include Mitsui High-tec, Inc., Jiangsu Lianbo Precision Technology Co., Ltd., EuroGroup Laminations S.p.A., Xinzhi Group Co., Ltd., JFE Shoji Corporation, Ningbo Zhenyu Technology Co., Ltd., Worthington Steel, Inc. (Tempel), R.Bourgeois S.A., POSCO Mobility Solution, Jiangyin Huaxin Precision Technology Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Automotive Iron Core market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Stator Core

Rotor Core

Market segment by Motor Technology

Permanent Magnet Synchronous Motor (PMSM)

Induction Motor (IM)

Electrically Excited Synchronous Motor (EESM)

Others

Market segment by Magnetic Flux Configuration

Radial Flux Motor Core

Axial Flux Motor Core

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Others

Market segment by Application

Passenger Cars

Commercial Vehicles

Market segment by players, this report covers

Mitsui High-tec, Inc.

Jiangsu Lianbo Precision Technology Co., Ltd.

EuroGroup Laminations S.p.A.

Xinzhi Group Co., Ltd.

JFE Shoji Corporation

Ningbo Zhenyu Technology Co., Ltd.

Worthington Steel, Inc. (Tempel)

R.Bourgeois S.A.

POSCO Mobility Solution

Jiangyin Huaxin Precision Technology Corporation

Nantong Tongda Silicon Steel Technology Co., Ltd.

YUMA Precision Technology (Jiangsu) Co., Ltd.

Wuxi Longsheng Technology Co., Ltd.

Zhejiang Shiri Electromechanical Technology Co., Ltd.

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Zhuoerbo (Ningbo) Precision Electromechanical Co., Ltd.

Shandong Boyuan Precision Machinery Co., Ltd.

Zhejiang Jufeng Technology Co., Ltd.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Automotive Iron Core product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Automotive Iron Core, with revenue, gross margin, and global market share of Automotive Iron Core from 2021 to 2026.

Chapter 3, the Automotive Iron Core competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and Automotive Iron Core market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

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Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Automotive Iron Core.

Chapter 13, to describe Automotive Iron Core research findings and conclusion.

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