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Global EV In-Wheel Motor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global EV In-Wheel Motor market size is expected to reach $ 595 million by 2032, rising at a market growth of 18.4% CAGR during the forecast period (2026-2032).

Electric vehicle hub motors are automotive-grade direct-drive power units that are directly integrated inside the wheel hub of electric vehicles. They drive the wheel rotation directly through the motor body, completely eliminating intermediate transmission components such as gearboxes, drive shafts, and differentials found in traditional fuel vehicles/conventional electric vehicles, thus achieving integrated power system and wheel integration.

In 2025, the global production of EV in-wheel motors was 21,000 units, with an average price of US$8,500 per unit.

In recent years, electric vehicle in-wheel motor market has entered a period of rapid development, driven by policy initiatives, technological breakthroughs, and market demand. As a key core power technology for new energy vehicles, in-wheel motors significantly improve vehicle energy efficiency and space utilization by integrating the drive system into the wheel hub. This transformative technology is reshaping the automotive industry chain and driving accelerated collaborative innovation among upstream and downstream companies.

Policy support and environmental protection requirements are the core drivers of the market. China's 14th Five-Year Plan explicitly lists in-wheel motors as a key technology for new energy vehicles. The expected mandatory installation of electronic mechanical brakes (EMBs) in commercial vehicles by 2025 has directly driven the penetration rate of in-wheel motors in buses and logistics vehicles to exceed 25%. The EU's 2035 ban

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on the sale of gasoline-powered vehicles is forcing automakers to transform their technology. Models such as the Volkswagen ID.2 R are accelerating the commercialization of in-wheel motors, whose 400 horsepower output is 40% higher than traditional dual-motor systems. Consumers' pursuit of intelligent driving and improved range has created a strong demand. Drive-by-wire chassis technology supported by in-wheel motors has increased vehicle control response speeds to 80 milliseconds, a 60% improvement compared to traditional mechanical transmissions. The upstream industry chain presents dual barriers of resources and technology. In the field of permanent magnet materials, Japan's Hitachi Metals holds patents for high-end sintered NdFeB, while China's Zhongke Sanhuan has improved its high-temperature resistance to over 200°C through grain boundary diffusion technology. In the power semiconductor sector, Star Semiconductor's SiC module yield has exceeded 80%, but substrate materials still rely on imports, and Infineon holds a significant global market share. In the midstream manufacturing sector, Protean's PD18 in-wheel motor achieves a power density of 75kW. BYD reduces system costs by 35% through modular design, and Jingjin Electric's hidden drive axle increases response speed to 1.5 times that of traditional systems. In downstream applications, Yutong Bus has achieved large-scale application of in-wheel motors in new energy buses, and the Tesla Model S Plaid has demonstrated the handling limits of four-wheel independent drive.

Market competition is characterized by 'international technology dominance, local cost breakthroughs.' The in-wheel motor system developed by Protean in collaboration with Mercedes-Benz achieves 85% brake energy recovery, and Elaphe's radial flux motor has a 23% market share in the commercial vehicle sector. Domestic companies have gained advantages through vertical integration. The wire-controlled chassis project jointly developed by VIE Technology and Tsinghua University won the second prize of the National Science and Technology Progress Award. Asia Pacific Holdings, after acquiring a stake in a Slovenian technology company, has achieved localized production. In terms of production capacity, the Yangtze River Delta region houses 68% of China's in-wheel motor-related companies. Tesla's Shanghai Gigafactory has driven the development of an annual production capacity of 2 million units in the surrounding area. Exports primarily target electric buses and mining trucks.

This report studies the global EV In-Wheel Motor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for EV In-Wheel Motor and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and

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competition, as well as details the characteristics of EV In-Wheel Motor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global EV In-Wheel Motor total production and demand, 2021-2032, (Units)
Global EV In-Wheel Motor total production value, 2021-2032, (USD Million)
Global EV In-Wheel Motor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global EV In-Wheel Motor consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: EV In-Wheel Motor domestic production, consumption, key domestic manufacturers and share
Global EV In-Wheel Motor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global EV In-Wheel Motor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global EV In-Wheel Motor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global EV In-Wheel Motor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hyundai Mobis, Continental, Schaeffler, NTN, NSK, Bosch, Delta Electronics, Ziehl-Abegg, Bedeo (Protean), Elaphe, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World EV In-Wheel Motor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

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Global EV In-Wheel Motor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global EV In-Wheel Motor Market, Segmentation by Type:

Inner Rotor Motor

Outer Rotor Motor

Global EV In-Wheel Motor Market, Segmentation by Motor Type:

Permanent Magnet Synchronous Hub Motor

Asynchronous Induction Hub Motor

Switched Reluctance Hub Motor

Global EV In-Wheel Motor Market, Segmentation by Cooling Method:

Air-Cooled

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Liquid-Cooled

Combined Type

Global EV In-Wheel Motor Market, Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

Companies Profiled:

Hyundai Mobis

Continental

Schaeffler

NTN

NSK

Bosch

Delta Electronics

Ziehl-Abegg

Bedeo (Protean)

Elaphe

DeepDrive

Donut Lab

PMW Dynamics

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Key Questions Answered:

1. How big is the global EV In-Wheel Motor market?
2. What is the demand of the global EV In-Wheel Motor market?
3. What is the year over year growth of the global EV In-Wheel Motor market?
4. What is the production and production value of the global EV In-Wheel Motor market?
5. Who are the key producers in the global EV In-Wheel Motor market?
6. What are the growth factors driving the market demand?

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