

Global High Voltage Rare Earth Free Electric Motor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High Voltage Rare Earth Free Electric Motor market size is expected to reach \$ 8230 million by 2032, rising at a market growth of 15.9% CAGR during the forecast period (2026-2032).

High voltage rare earth free motors are drive motors designed for high-voltage electrical platforms that do not require rare-earth permanent magnet materials (such as NdFeB). They primarily utilize induction, switched reluctance, electrically excited synchronous, or ferrite permanent magnet technologies. Key characteristics include stable raw material supply, high-temperature resistance, controllable costs, and strong environmental adaptability; major applications span new energy vehicles, rail transit, and industrial equipment.

Upstream components primarily include electrical steel, copper wire, ferrite magnetic materials, insulation materials, bearings, power semiconductors, and control chips; downstream applications cover new energy vehicles, commercial vehicles, rail transit, construction machinery, marine electric propulsion, industrial automation, and new energy power generation equipment.

The global market for highvoltage rare earth free motors features a unit price of \$350, an annual sales volume of approximately 8.12 million units, and a global annual production capacity of roughly 10 million to 15 million units, with an industry profit margin of 20%.

The future of the global high-voltage rare-earth-free motor market will be driven by rare-earth price fluctuations, supply chain security concerns, and the trend toward high-voltage systems in new energy vehicles. The widespread adoption of 800V (and higher)

electrical platforms will raise performance requirements?specifically regarding high speed, high efficiency, high power density, and high-temperature resistance?thereby accelerating the industrialization of electrically excited synchronous, induction, and switched reluctance technologies. Companies will enhance system efficiency by optimizing electromagnetic structures, reducing torque ripple, improving cooling systems, and utilizing silicon carbide (SiC) controllers. Concurrently, technologies such as modular design, oil cooling, hairpin (flat-wire) windings, and motor control algorithms will continue to mature. As vehicle manufacturers reduce their reliance on rare-earth materials, high-voltage rare-earth-free motors are expected to see expanded application in commercial vehicles, construction machinery, and high-end passenger vehicles. Additionally, Astemo is independently developing a new type of rare-earth-free motor for battery electric vehicles (BEVs), which is expected to enter service by 2030.

This report studies the global High Voltage Rare Earth Free Electric Motor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High Voltage Rare Earth Free Electric 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 competition, as well as details the characteristics of High Voltage Rare Earth Free Electric Motor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High Voltage Rare Earth Free Electric Motor total production and demand, 2021-2032, (K Units)

Global High Voltage Rare Earth Free Electric Motor total production value, 2021-2032, (USD Million)

Global High Voltage Rare Earth Free Electric Motor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global High Voltage Rare Earth Free Electric Motor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: High Voltage Rare Earth Free Electric Motor domestic production, consumption, key domestic manufacturers and share

Global High Voltage Rare Earth Free Electric Motor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global High Voltage Rare Earth Free Electric Motor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global High Voltage Rare Earth Free Electric Motor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global High Voltage Rare Earth Free Electric 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 Valeo, MAHLE, ZF, BMW, Renault Group, Schaeffler, BorgWarner, Tesla, ABB, Innomotics, 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 High Voltage Rare Earth Free Electric Motor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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.

Global High Voltage Rare Earth Free Electric Motor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High Voltage Rare Earth Free Electric Motor Market, Segmentation by Type:

Non-magnetic Motor

Permanent Magnet Motor

Global High Voltage Rare Earth Free Electric Motor Market, Segmentation by Voltage Platform:

400 V Class

600 V Class

800 V Class

900 V Class

Above 1000 V

Global High Voltage Rare Earth Free Electric Motor Market, Segmentation by Rated Power:

Below 50 kW

50?100 kW

100?200 kW

200?400 kW

Above 400 kW

Global High Voltage Rare Earth Free Electric Motor Market, Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

Companies Profiled:

Valeo

MAHLE

ZF

BMW

Renault Group

Schaeffler

BorgWarner

Tesla

ABB

Innomotics

Nissan

Nidec

TMEIC

Key Questions Answered:

1. How big is the global High Voltage Rare Earth Free Electric Motor market?

2. What is the demand of the global High Voltage Rare Earth Free Electric Motor market?
3. What is the year over year growth of the global High Voltage Rare Earth Free Electric Motor market?
4. What is the production and production value of the global High Voltage Rare Earth Free Electric Motor market?
5. Who are the key producers in the global High Voltage Rare Earth Free Electric Motor market?
6. What are the growth factors driving the market demand?

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