

Global Rare Earth Free Electric Motor Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Rare Earth Free Electric Motor market size was valued at US\$ 1317 million in 2025 and is forecast to a readjusted size of US\$ 1736 million by 2032 with a CAGR of 4.0% during review period.

A 'Rare Earth Free Electric Motor' refers to an electric motor design that does not use rare earth elements in its construction. Rare earth elements, such as neodymium and dysprosium, are commonly used in the magnets of many electric motors due to their strong magnetic properties. However, rare earth elements are expensive to mine and can have significant environmental impacts.

In 2025, global Rare Earth Free Electric Motor production reached approximately 1,684 K units, with an average global market price of around US\$ 760 per unit.

The Rare Earth Free Electric Motor Market is witnessing a notable shift driven by increasing environmental concerns and the need for sustainable technologies. Major sales regions such as North America, Europe, and Asia-Pacific are experiencing a surge in demand for these motors owing to stringent regulations and incentives promoting clean energy adoption. Market concentration is gradually diversifying as manufacturers focus on developing rare earth-free alternatives, reducing dependence on China's dominant supply chain. This shift presents significant market opportunities for companies investing in research and development of innovative motor designs and materials. However, challenges persist, including higher production costs, technological limitations, and the need for widespread adoption. Overcoming these hurdles requires collaborative efforts between industry stakeholders and policymakers to foster innovation and accelerate the transition towards greener mobility solutions.

The upstream of the rare earth free electric motor supply chain primarily covers raw material suppliers and core component manufacturers, providing electrical steel laminations, copper windings, aluminum structural parts, ferrite magnets for auxiliary topologies, bearings, power semiconductors, and motor controllers, along with supporting stamping, winding, and precision machining equipment. The midstream is the core manufacturing and system integration link, where manufacturers complete rotor and stator fabrication, winding assembly, motor calibration, controller matching, and full performance testing, producing motors of different technical routes including switched reluctance, synchronous reluctance, induction, and electrically excited synchronous types. The downstream connects to end markets through automotive Tier 1 suppliers, industrial distributors, and EPC contractors, serving end scenarios such as electric vehicles, industrial automation equipment, household appliances, wind power generation, and aerospace systems, with installation, commissioning and after-sales maintenance services running through the entire product lifecycle.

The cost structure of rare earth free electric motors is dominated by direct material costs, which account for 60% to 70% of the total manufacturing cost, with core expenditures on electrical steel, copper windings, structural components and power electronics; since expensive rare earth permanent magnets are eliminated, the overall material cost is 15% to 30% lower than that of conventional rare earth permanent magnet synchronous motors. Manufacturing and processing costs account for roughly 20% to 25%, covering labor input, equipment depreciation, energy consumption and quality inspection throughout stamping, winding, assembly and testing, and this portion rises for complex topologies such as electrically excited synchronous motors due to higher structural precision requirements. The remaining costs come from R&D amortization of magnetic circuit design and sensorless control algorithms, product certification, logistics and transportation, and after-sales service reserves; customized high-power products have significantly higher indirect costs than standardized mass-produced models.

This report is a detailed and comprehensive analysis for global Rare Earth Free Electric Motor market. Both quantitative and qualitative analyses are presented by manufacturers, 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 Rare Earth Free Electric Motor market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Rare Earth Free Electric Motor market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Rare Earth Free Electric Motor market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Rare Earth Free Electric Motor market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 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 Rare Earth Free Electric Motor

- 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 Rare Earth Free Electric Motor market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ZF Friedrichshafen AG, Valeo, Baldor, Chara Technologies, ABB, Mahle, Ricardo, Advanced Electric Machines, Schaeffler, Enedym, etc.

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

Market Segmentation

Rare Earth Free Electric Motor 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 in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Permanent Magnet Synchronous Motor (PMSM)

Switched Reluctance Motor (SRM)

Market segment by Cooling Method

Air-Cooled Motor

Water-Cooled Motor

Other

Market segment by Power Output

Low Power: 200 kW

Market segment by Application

Automotive Sector

Industrial Automation

Renewable Energy

Aerospace and Defense

Others

Major players covered

ZF Friedrichshafen AG

Valeo

Baldor

Chara Technologies

ABB

Mahle

Ricardo

Advanced Electric Machines

Schaeffler

Enedym

Wolong Electric

Gree Kaibang

Shandong Kehui Power Automation

Nidec Corporation

Mitsubishi Electric Corporation

Toshiba

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Rare Earth Free Electric Motor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Rare Earth Free Electric Motor, with price, sales quantity, revenue, and global market share of Rare Earth Free Electric Motor from 2021 to 2026.

Chapter 3, the Rare Earth Free Electric Motor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Rare Earth Free Electric Motor breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Rare Earth Free Electric Motor market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Rare Earth

Free Electric Motor.

Chapter 14 and 15, to describe Rare Earth Free Electric Motor sales channel, distributors, customers, research findings and conclusion.

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