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Global Automotive EPS Motor Market Growth 2026-2032

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Abstracts

The global Automotive EPS Motor market size is predicted to grow from US$ 2474 million in 2025 to US$ 3142 million in 2032; it is expected to grow at a CAGR of 3.6% from 2026 to 2032.

An Automotive EPS Motor is the core electromechanical actuator of an automotive electric power steering system. Based on commands generated by the electronic control unit from steering-wheel torque, steering angle, vehicle speed and vehicle-dynamics information, the motor converts electrical energy into precisely controlled mechanical torque and transfers assistance to the steering column, pinion or rack through worm gears, pinions, belts, ball screws or other transmission mechanisms. As vehicle steering evolves from hydraulic assistance toward electromechanical assistance and ultimately steer-by-wire execution, the Automotive EPS Motor is becoming not only an energy-efficient assist device but also a critical actuator for vehicle lateral-motion control and intelligent chassis systems.

Key Findings

Global Automotive EPS Motor shipments reached 85.046 million units in 2025, with an average market price of US$29.74 per unit

China was the largest demand market with 30.159 million units in 2025, accounting for 35.46% of global shipments

Market Trends

The Automotive EPS Motor industry is shifting from penetration-driven growth toward architecture upgrading, higher output capability and increasing value per vehicle.

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Mature passenger-car EPS adoption leaves less room for simple replacement of hydraulic steering, while heavier electric vehicles, larger SUVs and pickups, wider tires and increasing front-axle loads are moving demand toward higher-output D-PEPS and R-EPS architectures. Brushless permanent-magnet motors are becoming the mainstream solution for new high-performance programs because of their efficiency, power density, controllability, durability and NVH advantages, while brushed motors are increasingly concentrated in cost-sensitive legacy platforms. The 12V architecture remains dominant in mainstream passenger vehicles, but 48V is becoming more relevant for high-output R-EPS, selected D-PEPS, heavy vehicle applications and Steer-by-Wire where lower current, thermal management and redundancy become increasingly important. At the same time, standalone motors are evolving toward integrated Motor-ECU Power Packs, transferring competitive differentiation from electromagnetic design alone toward electronics, thermal management, software, functional safety and system integration.

Steer-by-Wire represents the next major architectural transition. Instead of retaining a permanent mechanical steering connection, the technology separates hand-wheel feedback from road-wheel actuation and therefore increases requirements for redundant sensing, power supply, controllers, communication and actuation. Commercialization has progressed into series-production deployment, and current system architectures increasingly emphasize dual controllers, dual power supplies and redundant actuation paths to maintain steering functionality following a single-point failure. This transition expands the Automotive EPS Motor opportunity from one conventional assist motor toward hand-wheel actuators and road-wheel actuators with higher functional-safety content and potentially higher motor content per vehicle.

Market Dynamics

Drivers

Electrification, vehicle size growth and advanced driver-assistance functions are the principal structural drivers of the Automotive EPS Motor market. Battery-electric vehicles and large SUVs generally impose higher steering loads, increasing demand for higher continuous output, peak torque and thermal capability and supporting migration toward D-PEPS and R-EPS. ADAS functions such as automated parking, lane keeping and lane centering also transform EPS from a driver-assistance mechanism into an active lateral-motion actuator, raising requirements for response speed, torque accuracy, diagnostics and redundancy. Commercial-vehicle electrification adds another source of incremental demand as high-power motors and 24V/48V platforms extend

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pure electric steering into vans, logistics vehicles, light trucks and selected medium-duty vehicles. Policy direction is also supportive of higher-reliability chassis-by-wire technologies; China's Ministry of Industry and Information Technology-led Manufacturing Reliability Improvement Implementation Opinions explicitly identifies steer-by-wire and other chassis-by-wire systems as priority areas for automotive reliability improvement.

Restraints

The principal restraint is the maturity of conventional passenger-vehicle EPS. Penetration in North America, Europe, China, Japan and South Korea is already high, reducing the incremental volume available from further replacement of hydraulic steering and increasing the industry's dependence on vehicle production cycles. Mature C-EPS and selected P-EPS products also face sustained annual cost-down pressure from OEMs and steering Tier 1 suppliers. Vehicle programs typically remain in production for several years, while selling prices are subject to continuing commercial reductions even when raw-material, labor, depreciation and engineering costs do not decline at the same rate. This creates persistent margin pressure and favors suppliers able to use automation, platform commonality, localization and manufacturing-yield improvements to reduce cost.

Opportunities

The most attractive opportunities are concentrated in higher-value architectures rather than conventional low-output volume expansion. High-output R-EPS and D-PEPS benefit from heavier EVs, large SUVs and pickups, while commercial vehicles provide additional penetration headroom as pure electric steering expands beyond light-duty applications. Steer-by-Wire offers a second source of value growth by creating separate hand-wheel feedback and road-wheel actuation functions and introducing stronger redundancy requirements. The report estimates that Steer-by-Wire motors could rise from only 68 thousand units in 2025 to 16.801 million units by 2032, representing 16.08% of global Automotive EPS Motor shipments and 19.76% of revenue by that point. The opportunity therefore lies not only in incremental unit volume but also in higher motor power, greater electronics content, redundant architecture and higher value per vehicle.

Challenges

The market remains technically and commercially demanding because steering is a safety-critical function with long development and validation cycles. Suppliers are

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exposed to customer concentration, platform nomination risk and changes in make-versus-buy strategies at integrated steering Tier 1s. Loss of a major platform cannot normally be replaced quickly because motor, ECU, sensors, reduction mechanisms and vehicle-control strategies require extensive matching and validation before SOP. Material risks also remain significant: high-performance neodymium-iron-boron magnets, enamelled copper wire and non-oriented electrical steel are key inputs, and fluctuations in rare-earth, copper, steel and energy prices cannot always be transferred immediately to OEM customers. As products progress toward redundant EPS and Steer-by-Wire, functional-safety validation, fault tolerance, cybersecurity, production consistency and the capital intensity of automated manufacturing become increasingly important barriers to entry.

Industry Chain Analysis

The Automotive EPS Motor industry chain begins with electromagnetic and structural materials, particularly enamelled copper wire, rare-earth permanent magnets and non-oriented electrical steel, which have the greatest direct influence on motor cost, efficiency and power density. Midstream value creation covers electromagnetic design, stator stamping and winding, rotor and magnet assembly, shaft and bearing systems, power electronics, sensors, ECU integration, thermal design, software calibration and end-of-line functional testing. As Motor-ECU integration increases, value creation is gradually shifting toward complete mechatronic Power Packs rather than standalone electromagnetic components. Downstream, Automotive EPS Motors are predominantly sold through OEM-oriented B2B programs to steering-system suppliers or vehicle manufacturers. Commercialization typically requires supplier qualification, RFQ, technical evaluation, project nomination, prototype development, DV/PV validation, APQP, PPAP and pre-series production before vehicle SOP. This lengthy qualification process creates high switching costs and strong platform stickiness, while also making production utilization highly dependent on individual vehicle programs.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Automotive EPS Motor Industry Forecast” looks at past sales and reviews total world Automotive EPS Motor sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive EPS Motor sales for 2026 through 2032. With Automotive EPS Motor sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive EPS Motor industry.

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This Insight Report provides a comprehensive analysis of the global Automotive EPS Motor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive EPS Motor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive EPS Motor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive EPS Motor and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive EPS Motor.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive EPS Motor market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

C-EPS Motor

D-PEPS Motor

R-EPS Motor

P-EPS Motor

Steer-by-wire Motor

Segmentation by Technology:

Brushed DC Motor

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Brushless DC Motor

Segmentation by Power:

Below 300W

300–500W

500–800W

Above 800W

Segmentation by Application:

Passenger car

Commercial Vehicle

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- NIDEC

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Mitsubishi Electric Mobility

Bosch

DENSO

MAHLE

Brose

Taigene

MITSUBA

LG Innotek

Ningbo Dechang

SNT Motiv

Henglong Group

Welling

Powerful

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive EPS Motor market?

What factors are driving Automotive EPS Motor market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive EPS Motor market opportunities vary by end market size?

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How does Automotive EPS Motor break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Automotive EPS Motor Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Automotive EPS Motor by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Automotive EPS Motor by Country/Region, 2021, 2025 & 2032
2.2 Automotive EPS Motor Segment by Type
  2.2.1 C-EPS Motor
  2.2.2 D-PEPS Motor
  2.2.3 R-EPS Motor
  2.2.4 P-EPS Motor
  2.2.5 Steer-by-wire Motor
  2.2.6 Automotive EPS Motor Sales by Type
    2.2.6.1 Global Automotive EPS Motor Sales Market Share by Type (2021-2026)
    2.2.6.2 Global Automotive EPS Motor Revenue and Market Share by Type (2021-2026)
    2.2.6.3 Global Automotive EPS Motor Sale Price by Type (2021-2026)
2.3 Automotive EPS Motor Segment by Technology
  2.3.1 Brushed DC Motor
  2.3.2 Brushless DC Motor
  2.3.3 Automotive EPS Motor Sales by Technology
    2.3.3.1 Global Automotive EPS Motor Sales Market Share by Technology (2021-2026)
    2.3.3.2 Global Automotive EPS Motor Revenue and Market Share by Technology

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(2021-2026)
2.3.3.3 Global Automotive EPS Motor Sale Price by Technology (2021-2026)
2.4 Automotive EPS Motor Segment by Power
2.4.1 Below 300W
2.4.2 300–500W
2.4.3 500–800W
2.4.4 Above 800W
2.4.5 Automotive EPS Motor Sales by Power
2.4.5.1 Global Automotive EPS Motor Sales Market Share by Power (2021-2026)
2.4.5.2 Global Automotive EPS Motor Revenue and Market Share by Power (2021-2026)
2.4.5.3 Global Automotive EPS Motor Sale Price by Power (2021-2026)
2.5 Automotive EPS Motor Segment by Application
2.5.1 Passenger car
2.5.2 Commercial Vehicle
2.5.3 Automotive EPS Motor Sales by Application
2.5.3.1 Global Automotive EPS Motor Sale Market Share by Application (2021-2026)
2.5.3.2 Global Automotive EPS Motor Revenue and Market Share by Application (2021-2026)
2.5.3.3 Global Automotive EPS Motor Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive EPS Motor Breakdown Data by Company
3.1.1 Global Automotive EPS Motor Annual Sales by Company (2021-2026)
3.1.2 Global Automotive EPS Motor Sales Market Share by Company (2021-2026)
3.2 Global Automotive EPS Motor Annual Revenue by Company (2021-2026)
3.2.1 Global Automotive EPS Motor Revenue by Company (2021-2026)
3.2.2 Global Automotive EPS Motor Revenue Market Share by Company (2021-2026)
3.3 Global Automotive EPS Motor Sale Price by Company
3.4 Key Manufacturers Automotive EPS Motor Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Automotive EPS Motor Product Location Distribution
3.4.2 Players Automotive EPS Motor Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

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info@marketpublishers.com

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE EPS MOTOR BY GEOGRAPHIC REGION

4.1 World Historic Automotive EPS Motor Market Size by Geographic Region (2021-2026)
  4.1.1 Global Automotive EPS Motor Annual Sales by Geographic Region (2021-2026)
  4.1.2 Global Automotive EPS Motor Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Automotive EPS Motor Market Size by Country/Region (2021-2026)
  4.2.1 Global Automotive EPS Motor Annual Sales by Country/Region (2021-2026)
  4.2.2 Global Automotive EPS Motor Annual Revenue by Country/Region (2021-2026)
4.3 Americas Automotive EPS Motor Sales Growth
4.4 APAC Automotive EPS Motor Sales Growth
4.5 Europe Automotive EPS Motor Sales Growth
4.6 Middle East & Africa Automotive EPS Motor Sales Growth

5 AMERICAS

5.1 Americas Automotive EPS Motor Sales by Country
  5.1.1 Americas Automotive EPS Motor Sales by Country (2021-2026)
  5.1.2 Americas Automotive EPS Motor Revenue by Country (2021-2026)
5.2 Americas Automotive EPS Motor Sales by Type (2021-2026)
5.3 Americas Automotive EPS Motor Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Automotive EPS Motor Sales by Region
  6.1.1 APAC Automotive EPS Motor Sales by Region (2021-2026)
  6.1.2 APAC Automotive EPS Motor Revenue by Region (2021-2026)
6.2 APAC Automotive EPS Motor Sales by Type (2021-2026)
6.3 APAC Automotive EPS Motor Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea

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6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive EPS Motor by Country
  7.1.1 Europe Automotive EPS Motor Sales by Country (2021-2026)
  7.1.2 Europe Automotive EPS Motor Revenue by Country (2021-2026)
7.2 Europe Automotive EPS Motor Sales by Type (2021-2026)
7.3 Europe Automotive EPS Motor Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive EPS Motor by Country
  8.1.1 Middle East & Africa Automotive EPS Motor Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Automotive EPS Motor Revenue by Country (2021-2026)
8.2 Middle East & Africa Automotive EPS Motor Sales by Type (2021-2026)
8.3 Middle East & Africa Automotive EPS Motor Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

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info@marketpublishers.com

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Automotive EPS Motor
10.3 Manufacturing Process Analysis of Automotive EPS Motor
10.4 Industry Chain Structure of Automotive EPS Motor

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Automotive EPS Motor Distributors
11.3 Automotive EPS Motor Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE EPS MOTOR BY GEOGRAPHIC REGION

12.1 Global Automotive EPS Motor Market Size Forecast by Region
  12.1.1 Global Automotive EPS Motor Forecast by Region (2027-2032)
  12.1.2 Global Automotive EPS Motor Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Automotive EPS Motor Forecast by Type (2027-2032)
12.7 Global Automotive EPS Motor Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 NIDEC
  13.1.1 NIDEC Company Information
  13.1.2 NIDEC Automotive EPS Motor Product Portfolios and Specifications
  13.1.3 NIDEC Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 NIDEC Main Business Overview
  13.1.5 NIDEC Latest Developments
13.2 Mitsubishi Electric Mobility
  13.2.1 Mitsubishi Electric Mobility Company Information
  13.2.2 Mitsubishi Electric Mobility Automotive EPS Motor Product Portfolios and

+357 96 030922
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Specifications
13.2.3 Mitsubishi Electric Mobility Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Mitsubishi Electric Mobility Main Business Overview
13.2.5 Mitsubishi Electric Mobility Latest Developments
13.3 Bosch
13.3.1 Bosch Company Information
13.3.2 Bosch Automotive EPS Motor Product Portfolios and Specifications
13.3.3 Bosch Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Bosch Main Business Overview
13.3.5 Bosch Latest Developments
13.4 DENSO
13.4.1 DENSO Company Information
13.4.2 DENSO Automotive EPS Motor Product Portfolios and Specifications
13.4.3 DENSO Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 DENSO Main Business Overview
13.4.5 DENSO Latest Developments
13.5 MAHLE
13.5.1 MAHLE Company Information
13.5.2 MAHLE Automotive EPS Motor Product Portfolios and Specifications
13.5.3 MAHLE Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 MAHLE Main Business Overview
13.5.5 MAHLE Latest Developments
13.6 Brose
13.6.1 Brose Company Information
13.6.2 Brose Automotive EPS Motor Product Portfolios and Specifications
13.6.3 Brose Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Brose Main Business Overview
13.6.5 Brose Latest Developments
13.7 Taigene
13.7.1 Taigene Company Information
13.7.2 Taigene Automotive EPS Motor Product Portfolios and Specifications
13.7.3 Taigene Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Taigene Main Business Overview

+357 96 030922
info@marketpublishers.com

13.7.5 Taigene Latest Developments
13.8 MITSUBA
13.8.1 MITSUBA Company Information
13.8.2 MITSUBA Automotive EPS Motor Product Portfolios and Specifications
13.8.3 MITSUBA Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 MITSUBA Main Business Overview
13.8.5 MITSUBA Latest Developments
13.9 LG Innotek
13.9.1 LG Innotek Company Information
13.9.2 LG Innotek Automotive EPS Motor Product Portfolios and Specifications
13.9.3 LG Innotek Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 LG Innotek Main Business Overview
13.9.5 LG Innotek Latest Developments
13.10 Ningbo Dechang
13.10.1 Ningbo Dechang Company Information
13.10.2 Ningbo Dechang Automotive EPS Motor Product Portfolios and Specifications
13.10.3 Ningbo Dechang Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Ningbo Dechang Main Business Overview
13.10.5 Ningbo Dechang Latest Developments
13.11 SNT Motiv
13.11.1 SNT Motiv Company Information
13.11.2 SNT Motiv Automotive EPS Motor Product Portfolios and Specifications
13.11.3 SNT Motiv Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 SNT Motiv Main Business Overview
13.11.5 SNT Motiv Latest Developments
13.12 Henglong Group
13.12.1 Henglong Group Company Information
13.12.2 Henglong Group Automotive EPS Motor Product Portfolios and Specifications
13.12.3 Henglong Group Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Henglong Group Main Business Overview
13.12.5 Henglong Group Latest Developments
13.13 Welling
13.13.1 Welling Company Information
13.13.2 Welling Automotive EPS Motor Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.13.3 Welling Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Welling Main Business Overview
13.13.5 Welling Latest Developments
13.14 Powerful
13.14.1 Powerful Company Information
13.14.2 Powerful Automotive EPS Motor Product Portfolios and Specifications
13.14.3 Powerful Automotive EPS Motor Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Powerful Main Business Overview
13.14.5 Powerful Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Automotive EPS Motor Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Automotive EPS Motor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of C-EPS Motor
Table 4. Major Players of D-PEPS Motor
Table 5. Major Players of R-EPS Motor
Table 6. Major Players of P-EPS Motor
Table 7. Major Players of Steer-by-wire Motor
Table 8. Global Automotive EPS Motor Sales by Type (2021-2026) & (K Units)
Table 9. Global Automotive EPS Motor Sales Market Share by Type (2021-2026)
Table 10. Global Automotive EPS Motor Revenue by Type (2021-2026) & ($ million)
Table 11. Global Automotive EPS Motor Revenue Market Share by Type (2021-2026)
Table 12. Global Automotive EPS Motor Sale Price by Type (2021-2026) & (US$/Unit)
Table 13. Major Players of Brushed DC Motor
Table 14. Major Players of Brushless DC Motor
Table 15. Global Automotive EPS Motor Sales by Technology (2021-2026) & (K Units)
Table 16. Global Automotive EPS Motor Sales Market Share by Technology (2021-2026)
Table 17. Global Automotive EPS Motor Revenue by Technology (2021-2026) & ($ million)
Table 18. Global Automotive EPS Motor Revenue Market Share by Technology (2021-2026)
Table 19. Global Automotive EPS Motor Sale Price by Technology (2021-2026) & (US$/Unit)
Table 20. Major Players of Below 300W
Table 21. Major Players of 300–500W
Table 22. Major Players of 500–800W
Table 23. Major Players of Above 800W
Table 24. Global Automotive EPS Motor Sales by Power (2021-2026) & (K Units)
Table 25. Global Automotive EPS Motor Sales Market Share by Power (2021-2026)
Table 26. Global Automotive EPS Motor Revenue by Power (2021-2026) & ($ million)
Table 27. Global Automotive EPS Motor Revenue Market Share by Power (2021-2026)
Table 28. Global Automotive EPS Motor Sale Price by Power (2021-2026) & (US$/Unit)
Table 29. Global Automotive EPS Motor Sale by Application (2021-2026) & (K Units)

+357 96 030922
info@marketpublishers.com

Table 30. Global Automotive EPS Motor Sale Market Share by Application (2021-2026)
Table 31. Global Automotive EPS Motor Revenue by Application (2021-2026) & ($ million)
Table 32. Global Automotive EPS Motor Revenue Market Share by Application (2021-2026)
Table 33. Global Automotive EPS Motor Sale Price by Application (2021-2026) & (US$/Unit)
Table 34. Global Automotive EPS Motor Sales by Company (2021-2026) & (K Units)
Table 35. Global Automotive EPS Motor Sales Market Share by Company (2021-2026)
Table 36. Global Automotive EPS Motor Revenue by Company (2021-2026) & ($ millions)
Table 37. Global Automotive EPS Motor Revenue Market Share by Company (2021-2026)
Table 38. Global Automotive EPS Motor Sale Price by Company (2021-2026) & (US$/Unit)
Table 39. Key Manufacturers Automotive EPS Motor Producing Area Distribution and Sales Area
Table 40. Players Automotive EPS Motor Products Offered
Table 41. Automotive EPS Motor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 42. New Products and Potential Entrants
Table 43. Market M&A Activity & Strategy
Table 44. Global Automotive EPS Motor Sales by Geographic Region (2021-2026) & (K Units)
Table 45. Global Automotive EPS Motor Sales Market Share Geographic Region (2021-2026)
Table 46. Global Automotive EPS Motor Revenue by Geographic Region (2021-2026) & ($ millions)
Table 47. Global Automotive EPS Motor Revenue Market Share by Geographic Region (2021-2026)
Table 48. Global Automotive EPS Motor Sales by Country/Region (2021-2026) & (K Units)
Table 49. Global Automotive EPS Motor Sales Market Share by Country/Region (2021-2026)
Table 50. Global Automotive EPS Motor Revenue by Country/Region (2021-2026) & ($ millions)
Table 51. Global Automotive EPS Motor Revenue Market Share by Country/Region (2021-2026)
Table 52. Americas Automotive EPS Motor Sales by Country (2021-2026) & (K Units)

+357 96 030922
info@marketpublishers.com

Table 53. Americas Automotive EPS Motor Sales Market Share by Country (2021-2026)
Table 54. Americas Automotive EPS Motor Revenue by Country (2021-2026) & ($ millions)
Table 55. Americas Automotive EPS Motor Sales by Type (2021-2026) & (K Units)
Table 56. Americas Automotive EPS Motor Sales by Application (2021-2026) & (K Units)
Table 57. APAC Automotive EPS Motor Sales by Region (2021-2026) & (K Units)
Table 58. APAC Automotive EPS Motor Sales Market Share by Region (2021-2026)
Table 59. APAC Automotive EPS Motor Revenue by Region (2021-2026) & ($ millions)
Table 60. APAC Automotive EPS Motor Sales by Type (2021-2026) & (K Units)
Table 61. APAC Automotive EPS Motor Sales by Application (2021-2026) & (K Units)
Table 62. Europe Automotive EPS Motor Sales by Country (2021-2026) & (K Units)
Table 63. Europe Automotive EPS Motor Revenue by Country (2021-2026) & ($ millions)
Table 64. Europe Automotive EPS Motor Sales by Type (2021-2026) & (K Units)
Table 65. Europe Automotive EPS Motor Sales by Application (2021-2026) & (K Units)
Table 66. Middle East & Africa Automotive EPS Motor Sales by Country (2021-2026) & (K Units)
Table 67. Middle East & Africa Automotive EPS Motor Revenue Market Share by Country (2021-2026)
Table 68. Middle East & Africa Automotive EPS Motor Sales by Type (2021-2026) & (K Units)
Table 69. Middle East & Africa Automotive EPS Motor Sales by Application (2021-2026) & (K Units)
Table 70. Key Market Drivers & Growth Opportunities of Automotive EPS Motor
Table 71. Key Market Challenges & Risks of Automotive EPS Motor
Table 72. Key Industry Trends of Automotive EPS Motor
Table 73. Automotive EPS Motor Raw Material
Table 74. Key Suppliers of Raw Materials
Table 75. Automotive EPS Motor Distributors List
Table 76. Automotive EPS Motor Customer List
Table 77. Global Automotive EPS Motor Sales Forecast by Region (2027-2032) & (K Units)
Table 78. Global Automotive EPS Motor Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Americas Automotive EPS Motor Sales Forecast by Country (2027-2032) & (K Units)
Table 80. Americas Automotive EPS Motor Annual Revenue Forecast by Country (2027-2032) & ($ millions)

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Table 81. APAC Automotive EPS Motor Sales Forecast by Region (2027-2032) & (K Units)
Table 82. APAC Automotive EPS Motor Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 83. Europe Automotive EPS Motor Sales Forecast by Country (2027-2032) & (K Units)
Table 84. Europe Automotive EPS Motor Revenue Forecast by Country (2027-2032) & ($ millions)
Table 85. Middle East & Africa Automotive EPS Motor Sales Forecast by Country (2027-2032) & (K Units)
Table 86. Middle East & Africa Automotive EPS Motor Revenue Forecast by Country (2027-2032) & ($ millions)
Table 87. Global Automotive EPS Motor Sales Forecast by Type (2027-2032) & (K Units)
Table 88. Global Automotive EPS Motor Revenue Forecast by Type (2027-2032) & ($ millions)
Table 89. Global Automotive EPS Motor Sales Forecast by Application (2027-2032) & (K Units)
Table 90. Global Automotive EPS Motor Revenue Forecast by Application (2027-2032) & ($ millions)
Table 91. NIDEC Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 92. NIDEC Automotive EPS Motor Product Portfolios and Specifications
Table 93. NIDEC Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 94. NIDEC Main Business
Table 95. NIDEC Latest Developments
Table 96. Mitsubishi Electric Mobility Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 97. Mitsubishi Electric Mobility Automotive EPS Motor Product Portfolios and Specifications
Table 98. Mitsubishi Electric Mobility Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 99. Mitsubishi Electric Mobility Main Business
Table 100. Mitsubishi Electric Mobility Latest Developments
Table 101. Bosch Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 102. Bosch Automotive EPS Motor Product Portfolios and Specifications
Table 103. Bosch Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price

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(US$/Unit) and Gross Margin (2021-2026)
Table 104. Bosch Main Business
Table 105. Bosch Latest Developments
Table 106. DENSO Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 107. DENSO Automotive EPS Motor Product Portfolios and Specifications
Table 108. DENSO Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 109. DENSO Main Business
Table 110. DENSO Latest Developments
Table 111. MAHLE Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 112. MAHLE Automotive EPS Motor Product Portfolios and Specifications
Table 113. MAHLE Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 114. MAHLE Main Business
Table 115. MAHLE Latest Developments
Table 116. Brose Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 117. Brose Automotive EPS Motor Product Portfolios and Specifications
Table 118. Brose Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 119. Brose Main Business
Table 120. Brose Latest Developments
Table 121. Taigene Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 122. Taigene Automotive EPS Motor Product Portfolios and Specifications
Table 123. Taigene Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 124. Taigene Main Business
Table 125. Taigene Latest Developments
Table 126. MITSUBA Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 127. MITSUBA Automotive EPS Motor Product Portfolios and Specifications
Table 128. MITSUBA Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 129. MITSUBA Main Business
Table 130. MITSUBA Latest Developments
Table 131. LG Innotek Basic Information, Automotive EPS Motor Manufacturing Base,

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Sales Area and Its Competitors
Table 132. LG Innotek Automotive EPS Motor Product Portfolios and Specifications
Table 133. LG Innotek Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 134. LG Innotek Main Business
Table 135. LG Innotek Latest Developments
Table 136. Ningbo Dechang Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 137. Ningbo Dechang Automotive EPS Motor Product Portfolios and Specifications
Table 138. Ningbo Dechang Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 139. Ningbo Dechang Main Business
Table 140. Ningbo Dechang Latest Developments
Table 141. SNT Motiv Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 142. SNT Motiv Automotive EPS Motor Product Portfolios and Specifications
Table 143. SNT Motiv Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 144. SNT Motiv Main Business
Table 145. SNT Motiv Latest Developments
Table 146. Henglong Group Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 147. Henglong Group Automotive EPS Motor Product Portfolios and Specifications
Table 148. Henglong Group Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 149. Henglong Group Main Business
Table 150. Henglong Group Latest Developments
Table 151. Welling Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 152. Welling Automotive EPS Motor Product Portfolios and Specifications
Table 153. Welling Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 154. Welling Main Business
Table 155. Welling Latest Developments
Table 156. Powerful Basic Information, Automotive EPS Motor Manufacturing Base, Sales Area and Its Competitors
Table 157. Powerful Automotive EPS Motor Product Portfolios and Specifications

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Table 158. Powerful Automotive EPS Motor Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 159. Powerful Main Business
Table 160. Powerful Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automotive EPS Motor
Figure 2. Automotive EPS Motor Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Automotive EPS Motor Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global Automotive EPS Motor Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Automotive EPS Motor Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Automotive EPS Motor Sales Market Share by Country/Region (2025)
Figure 10. Automotive EPS Motor Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of C-EPS Motor
Figure 12. Product Picture of D-PEPS Motor
Figure 13. Product Picture of R-EPS Motor
Figure 14. Product Picture of P-EPS Motor
Figure 15. Product Picture of Steer-by-wire Motor
Figure 16. Global Automotive EPS Motor Sales Market Share by Type in 2026
Figure 17. Global Automotive EPS Motor Revenue Market Share by Type (2021-2026)
Figure 18. Product Picture of Brushed DC Motor
Figure 19. Product Picture of Brushless DC Motor
Figure 20. Global Automotive EPS Motor Sales Market Share by Technology in 2026
Figure 21. Global Automotive EPS Motor Revenue Market Share by Technology (2021-2026)
Figure 22. Product Picture of Below 300W
Figure 23. Product Picture of 300–500W
Figure 24. Product Picture of 500–800W
Figure 25. Product Picture of Above 800W
Figure 26. Global Automotive EPS Motor Sales Market Share by Power in 2026
Figure 27. Global Automotive EPS Motor Revenue Market Share by Power (2021-2026)
Figure 28. Automotive EPS Motor Consumed in Passenger car
Figure 29. Global Automotive EPS Motor Market: Passenger car (2021-2026) & (K Units)
Figure 30. Automotive EPS Motor Consumed in Commercial Vehicle
Figure 31. Global Automotive EPS Motor Market: Commercial Vehicle (2021-2026) & (K

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Units)
Figure 32. Global Automotive EPS Motor Sale Market Share by Application (2025)
Figure 33. Global Automotive EPS Motor Revenue Market Share by Application in 2025
Figure 34. Automotive EPS Motor Sales by Company in 2025 (K Units)
Figure 35. Global Automotive EPS Motor Sales Market Share by Company in 2025
Figure 36. Automotive EPS Motor Revenue by Company in 2025 ($ millions)
Figure 37. Global Automotive EPS Motor Revenue Market Share by Company in 2025
Figure 38. Global Automotive EPS Motor Sales Market Share by Geographic Region (2021-2026)
Figure 39. Global Automotive EPS Motor Revenue Market Share by Geographic Region in 2025
Figure 40. Americas Automotive EPS Motor Sales 2021-2026 (K Units)
Figure 41. Americas Automotive EPS Motor Revenue 2021-2026 ($ millions)
Figure 42. APAC Automotive EPS Motor Sales 2021-2026 (K Units)
Figure 43. APAC Automotive EPS Motor Revenue 2021-2026 ($ millions)
Figure 44. Europe Automotive EPS Motor Sales 2021-2026 (K Units)
Figure 45. Europe Automotive EPS Motor Revenue 2021-2026 ($ millions)
Figure 46. Middle East & Africa Automotive EPS Motor Sales 2021-2026 (K Units)
Figure 47. Middle East & Africa Automotive EPS Motor Revenue 2021-2026 ($ millions)
Figure 48. Americas Automotive EPS Motor Sales Market Share by Country in 2025
Figure 49. Americas Automotive EPS Motor Revenue Market Share by Country (2021-2026)
Figure 50. Americas Automotive EPS Motor Sales Market Share by Type (2021-2026)
Figure 51. Americas Automotive EPS Motor Sales Market Share by Application (2021-2026)
Figure 52. United States Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 53. Canada Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 54. Mexico Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 55. Brazil Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 56. APAC Automotive EPS Motor Sales Market Share by Region in 2025
Figure 57. APAC Automotive EPS Motor Revenue Market Share by Region (2021-2026)
Figure 58. APAC Automotive EPS Motor Sales Market Share by Type (2021-2026)
Figure 59. APAC Automotive EPS Motor Sales Market Share by Application (2021-2026)
Figure 60. China Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 61. Japan Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 62. South Korea Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 63. Southeast Asia Automotive EPS Motor Revenue Growth 2021-2026 ($

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millions)
Figure 64. India Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 65. Australia Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 66. China Taiwan Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 67. Europe Automotive EPS Motor Sales Market Share by Country in 2025
Figure 68. Europe Automotive EPS Motor Revenue Market Share by Country (2021-2026)
Figure 69. Europe Automotive EPS Motor Sales Market Share by Type (2021-2026)
Figure 70. Europe Automotive EPS Motor Sales Market Share by Application (2021-2026)
Figure 71. Germany Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 72. France Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 73. UK Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 74. Italy Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 75. Russia Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 76. Middle East & Africa Automotive EPS Motor Sales Market Share by Country (2021-2026)
Figure 77. Middle East & Africa Automotive EPS Motor Sales Market Share by Type (2021-2026)
Figure 78. Middle East & Africa Automotive EPS Motor Sales Market Share by Application (2021-2026)
Figure 79. Egypt Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 80. South Africa Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 81. Israel Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 82. Turkey Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 83. GCC Countries Automotive EPS Motor Revenue Growth 2021-2026 ($ millions)
Figure 84. Manufacturing Cost Structure Analysis of Automotive EPS Motor in 2026
Figure 85. Manufacturing Process Analysis of Automotive EPS Motor
Figure 86. Industry Chain Structure of Automotive EPS Motor
Figure 87. Channels of Distribution
Figure 88. Global Automotive EPS Motor Sales Market Forecast by Region (2027-2032)
Figure 89. Global Automotive EPS Motor Revenue Market Share Forecast by Region (2027-2032)
Figure 90. Global Automotive EPS Motor Sales Market Share Forecast by Type (2027-2032)
Figure 91. Global Automotive EPS Motor Revenue Market Share Forecast by Type (2027-2032)

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Figure 92. Global Automotive EPS Motor Sales Market Share Forecast by Application (2027-2032)
Figure 93. Global Automotive EPS Motor Revenue Market Share Forecast by Application (2027-2032)

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