

Global Drive Motor Stator Market Growth 2026-2032

<https://marketpublishers.com/r/GE09EBB33428EN.html>

Date: July 2026

Pages: 123

Price: US\$ 3,660.00 (Single User License)

ID: GE09EBB33428EN

Abstracts

The global Drive Motor Stator market size is predicted to grow from US\$ 6.65 million in 2025 to US\$ 12.03 million in 2032; it is expected to grow at a CAGR of 8.7% from 2026 to 2032.

An EV traction motor stator assembly is the stationary electromagnetic component of an electric vehicle drive motor. It typically consists of a laminated electrical-steel stator core, slot insulation, copper windings, end connections, welded joints, impregnation or potting insulation, temperature sensing elements and terminal interfaces. Its primary function is to generate a rotating magnetic field under three-phase AC excitation from the inverter, interacting with the rotor magnetic field to produce traction torque. EV traction motor stators may use round-wire windings, hairpin windings, continuous wave windings, concentrated windings or distributed windings. Hairpin and wave-winding stators are increasingly used in high-power-density electric drive systems because they improve slot fill factor, thermal performance, manufacturing repeatability and motor efficiency.

Based on our research, EV traction motor stators have evolved from conventional electromagnetic components into a critical determinant of electric drive efficiency, power density, thermal performance and manufacturing scalability. A stator assembly includes not only the laminated electrical-steel core and copper windings, but also slot insulation, end-winding connections, welding, impregnation, terminals, thermal paths and in-line inspection requirements. As automakers demand longer range, higher acceleration, lower NVH and lower system cost, stator design and manufacturing quality have become increasingly important. Hairpin windings, flat-wire conductors, high slot-fill factors, oil-cooling compatibility and high-voltage insulation capability are now key areas of technology differentiation.

From a supply perspective, the market is structured around two major groups: vertically

integrated vehicle or e-drive manufacturers, and specialized stator-core or lamination suppliers. BYD, Tesla, Nidec, BorgWarner, Schaeffler, Bosch, ZF, Magna, Valeo, DENSO, Jing-Jin Electric and Inovance mainly participate through traction motors or complete e-drive systems. EuroGroup Laminations, Mitsui High-tec, POSCO Mobility Solution and Tempel are more focused on stator and rotor cores, precision laminations and motor-core manufacturing. The first group controls system design and customer interfaces, while the second group builds barriers through high-speed stamping, precision tooling, thin electrical-steel processing, stacking, bonding and large-volume quality consistency.

From a technology-route perspective, hairpin and flat-wire stators are becoming the mainstream choice for high-power passenger EV traction motors because they improve slot fill, thermal behavior and automated production repeatability. However, they also raise requirements for conductor forming, insertion, twisting, welding, insulation, impregnation and electrical testing. Round-wire stators will remain relevant in lower-power, cost-sensitive, hybrid and selected commercial-vehicle applications. Continuous wave winding and direct oil-cooling-compatible stators represent higher-performance directions, particularly for 800V platforms and heavy-duty electric drive systems.

Looking ahead, growth will be driven by EV production expansion, multi-motor vehicle architectures, plug-in hybrids, commercial vehicle electrification and regional localization of electric drive supply chains. China is already the largest production base for EV traction motor stators, supported by strong domestic vehicle production and vertically integrated electric-drive manufacturing. Europe, Japan and South Korea retain strong capabilities in electrical steel, motor cores, hybrid motor technologies and high-reliability manufacturing. North America is expanding through Tesla-led capacity, e-drive localization and supply-chain reshoring. Future competition will increasingly depend on design-manufacturing integration, production yield, insulation reliability, thermal management and the ability to support high-volume automated stator production.

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

This Insight Report provides a comprehensive analysis of the global Drive Motor Stator 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 Drive Motor Stator portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Drive Motor Stator market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Drive Motor Stator and breaks down the forecast by Winding Technology, 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 Drive Motor Stator.

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

Segmentation by Winding Technology:

- Hairpin Winding

- Flat-wire Winding

- Continuous Wave Winding

- Round-wire Winding

- Concentrated Winding

Segmentation by Cooling Compatibility:

- Water-jacket Compatible Stator

- Oil-spray Compatible Stator

- Direct Oil-cooled Stator

- Air-cooled Stator

Segmentation by Voltage Platform:

Low-voltage Hybrid Stator

400V EV Stator

800V EV Stator

Segmentation by Application:

Pure Electric Vehicle

Hybrid Electric Vehicle

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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.

BYD Company Limited

Tesla, Inc.

Nidec Corporation

BorgWarner Inc.

Schaeffler AG

Robert Bosch GmbH

ZF Friedrichshafen AG

Magna International Inc.

Valeo SE

DENSO Corporation

Hitachi Astemo, Ltd.

Jing-Jin Electric Technologies Co., Ltd.

Suzhou Inovance Automotive Co., Ltd.

Founder Motor Co., Ltd.

Wolong Electric Drive Group Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Drive Motor Stator market?

What factors are driving Drive Motor Stator market growth, globally and by region?

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

How do Drive Motor Stator market opportunities vary by end market size?

How does Drive Motor Stator break out by Winding Technology, by Application?

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