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China Electric Vehicle Drive Motor Industry Report, 2015-2020

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Abstracts

China Electric Vehicle Drive Motor Industry Report, 2015-2020 by ResearchInChina highlights the followings:

Overview of new energy vehicle drive motor, including definition, classification and industry chain of automotive drive motor;

Operating environment of China new energy vehicle drive motor industry, containing policy environment, development of new energy vehicle market and its impact on automotive drive motor industry;

Development of China new energy vehicle drive motor industry, covering industry chain, costs, business model, competitive landscape, and competition among mainstream manufacturers; elaboration on competitive landscape in passenger vehicle and commercial vehicle drive motor markets; detailed analysis of status quo and trends of drive motor technology;

22 Chinese companies and 6 global players, covering operation, development strategy, supply chain, new energy vehicle drive motor business, etc.

In 2014, electric vehicle (bus + passenger vehicle) drive motor system output value in China was worth up to RMB3.02 billion, a year-on-year surge of 125%:

(1) Bus drive motor output value was RMB2.35 billion, accounting for 76%, a focus of market competition, with the largest number of supporting companies;

(2) Due to lower price of single-vehicle drive motor system, passenger vehicle drive

motor system output value was RMB600 million and will keep increasing with rapid rise in the number.

(3) Output value of the drive motor for special vehicles, primarily logistics vehicle, city sanitation vehicle and sprinkler, was relatively small but has grown rapidly, especially driven by strong growth momentum of city battery-electric logistics vehicle since 2015.

Passenger vehicle mostly adopts permanent-magnet synchronous motor; the power of single unit of drive motor is often around 30KW-50KW and priced at RMB10,000-20,000. As the power of drive motor for mini electric vehicle is generally 20KW, the price falls to RMB7,000/unit accordingly. Passenger vehicle drive motor system now usually adopts the model of in-house, which prevails in companies like BYD, ZOTYE, Xin Dayang, SAIC Motor, and JAC Motors. And Zhongshan Broad-ocean Motor (serving BAIC Motor), Shanghai Edrive (serving Chery), Hangzhou Dewos Electric Technology (serving ZOTYE and acquired by Zhejiang Founder Motor) are few independent motor producers that enter the supply chain of mainstream passenger vehicle makers.

Bus drive motor system is the field that is highly competitive and with a large number of manufacturers. The biggest companies, in terms of market share, were Shanghai Edrive, Jing-Jin Electric and Zhuzhou CSR Times Electric in 2014. 100KW AC asynchronous drive motor is priced at around RMB10,000/unit, and dual-motor system is quoted at RMB300,000/unit.

Over the next five to ten years, drive motor technology will develop towards permanent magnetization, integration, and digitalization. Motor control and integration technology will be the focus of competition among enterprises. China lags far behind the advanced world levels in the aspects of key IGBT chip packaging technology and 3rd-generation SiC IGBT research and development, which will be prioritized in the future.

With regard to driving technology, there now two main modes: centralized driving and hub driving.

(1) Centralized motor driving is transformed from structure of traditional diesel locomotive, is suitable for mass production, and has easily controllable cost, enabling it the current mainstream motor driving mode.

(2) “Next-generation motor and electric control system” is likely to be hub motor and control system. Enjoying certain advantages in weight and efficiency, hub driving

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technology has started to be adopted in some hybrids by GM, Toyota and Benz and to be developed by some domestic makers with own brands. The technology now is still immature and has not been applied massively, but it may be the development direction of electric vehicle driving mode in the future. Japan and U.S. are way ahead in hub motor development, with industry leaders including Japanese Fuji Electric and Yasukawa Electric, and American Protean Electric.

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