

China EV (Electric Vehicle) Motor Controller Market Report, 2015

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Abstracts

From January to August of 2015, China sold 108,654 new energy vehicles, showing a skyrocketing growth of 270% year on year. Benefiting from the rapid development of new energy vehicles, the motor controller market will value more than RMB1.8 billion in 2015. It is projected that by 2017 this figure will rise to 280,000 sets and that the market size will hit RMB4.6 billion, with an AAGR of as much as 93%.

Currently, there are over 30 electric vehicle drive motor manufacturers in China, which can be divided into three strategic groups by strategic positions within the industry:

Group A consists of carmakers veteran in the production of conventional vehicles and auto parts;

Group B consists of enterprises with experience in the production of other types of motors;

Group C consists of motor enterprises established especially for electric vehicle.

With the ballooning of automotive drive motor system, these three strategic groups not only compete with each other, but also realize win-win by giving full play to their advantages.

By capacity, all manufacturers are lavishing more capital to expand production lines, and enhancing their core competitiveness even through mergers and acquisitions, take example for Broad-ocean Motor that acquired Shanghai Edrive in 2015 for RMB3.5 billion to fetch more than 30% market share and become a new overlord of motor drive system; the electric vehicle manufacturing base Phase II of CSR Times was completed

in December 2014, and will develop annual capacity of 10,000 electric buses as well as 20,000 sets of powertrain assembly and key components after going into operation; Jing-Jin Electric Technologies will produce 100,000 sets of products and export them to the US at the end of 2015 as scheduled.

As for business focus, the domestic passenger car companies have mostly built their own drive system production lines, while independent drive system suppliers primarily compete in large and medium-sized buses. A few independent motor manufacturers such as Broad-ocean Motor, Shanghai Edrive and Hangzhou Devos have entered the supply chain of mainstream passenger car makers.

Regarding competition, foreign motor companies are ambitious. For example, Bosch, Continental, SKF, Hitachi, Fuji Electric, Mitsubishi Electric and other companies only export motors to China now instead of producing drive motors in China. But, they quickly seized the orders for the first batch of new energy vehicles (especially hybrid buses), marking a big challenge for Chinese local players.

From the perspective of products, drive motor technology will head toward permanent magnet, digitization and integration in the next five to ten years. Enterprises mainly compete with each other in motor control and integrated technology, while China still lags far behind foreign counterparts dramatically in terms of critical IGBT chip packaging technology and R & D of the 3rd-generation silicon carbide (SiC) IGBT.

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