

China New Energy Vehicle Drive Motor Industry Report, 2014

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Abstracts

As of May 2014, about 30 companies in China, including complete vehicle factories, auto parts producers and independent motor manufacturers, can produce new energy vehicle drive motors, of which 15 could deliver goods in volume for complete vehicle factories. Among complete vehicle factories, BYD produces new energy vehicle drive motors by itself; Shanghai Edrive Co., Ltd. (Shanghai Edrive) is a leading new energy passenger vehicle drive motors player among independent motor or auto parts producers, and Hunan CSR Times Electronic vehicle Co., Ltd. is a champion in production of new-energy commercial vehicle drive motor.

Among foreign brands, complete vehicle companies like Toyota and Honda have established automobile motor factories in China to supply its industry chains; auto parts producers such as Bosch and ZF Friedrichshafen AG have set up joint ventures with domestic Chinese companies to develop and produce new energy vehicle drive motors; independent motor suppliers like Remy Inc. has built factories in China.

A total of about 46,000 sets of new-energy vehicle drive motors were made in China in 2013, generating output value of RMB 1.86 billion. Small industry size and slower expansion of production capacity are largely due to dismal popularization of new energy vehicles in China. However, China has stepped up its efforts to promote new energy vehicles in 2014, with growth rate of output and sales volume accelerating. In April 2014, China produced 3,850 new energy vehicles, soaring by 70.1% year on year. The accelerated growth of new energy vehicle market will promote the development of new energy vehicle drive motor market.

From application of various new energy vehicle drive motors in China, AC asynchronous induction motor and switch reluctance motor are primarily used in new

energy commercial vehicles, especially new energy buses, with the latter less applied in practical assemblage; permanent-magnet synchronous motors are mainly applied in new energy passenger vehicles. China Tex Mechanical & Electrical Engineering Ltd. takes the leadership in the field of switch reluctance motor, and Shanghai Edrive, Jing-Jin Electric Technologies (Beijing) Co., Ltd. (JJE) and Shenzhen Greatland Electrics Inc. are leading producers in permanent-magnet synchronous motor, of which JJE is the largest exporter of new energy drive motors in China.

China New Energy Vehicle Drive Motor Industry Report, 2014 covers the following:

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

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

Development of China new energy vehicle drive motor industry, covering costs, historical supply and demand, demand forecast and competition among mainstream manufacturers;

22 Chinese companies and 6 global players, containing operation, new energy vehicle drive motor business.

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