

Global and China Micro and Special Motor Industry Report, 2011-2012

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Abstracts

In 2011, the micro & special motor industry saw the price of its most crucial raw material NdFeB soar, with the price of sintered NdFeB magnet increasing from RMB 107/kg at the beginning of 2011 to RMB 607/kg in July and to RMB 330/kg in early November. However, as raw materials only account for a very small proportion (less than 5%) of the cost of micro & special motor, the price hike didn't promote the prices of micro & special motors or reduce the profits of micro & special motor manufacturers.

In 2010-2011, the smart phone market was booming, the autofocus function became a standard configuration of smart phone and an option for some feature phones. VCM manufacturers shipped products in the form of AF actuator module. South Korean JAHWA and Hysonic started a price war, and their core product is AF actuator. Japanese enterprises like Nidec, Mitsumi and TDK are large companies, VCM accounts for less than 2% of their revenue, and the losses are huge due to poor cost control. Nidec is the first one to exit the field, Shicoh is losing money, JAHWA and Hysonic see substantial increase in revenue and profit. JAHWA grew especially fast, won over Samsung from Hysonic, and increased the revenue by 167.5%.

In 2011, Apple adopted linear vibration motor which responds over twice faster than conventional motor. Apple has been using conventional vibration motor up to iPhone 4, and started to use linear motor since iPhone 4S. At present, only South Korean Samsung Electro-Mechanics and Bluecom can supply linear motors, and Bluecom cannot make large shipments until 2012. As the capacity of the two companies is limited, it's expected that other manufacturers won't adopt linear vibration motors as Apple does. The performance advantage of linear vibration motor is not obvious, but the cost is slightly higher.

Looking ahead, the prospect of HDD and ODD, the main application markets of micro & special motor, is not promising. The electronic devices in pursuit of thinness, lightness and low power consumption will try not to use HDD. The most popular tablets and Ultrabook use SSD instead of HDD. In the future, conventional light and thin notebooks will also use SSD instead of HDD. In addition, tablets, Ultrabook, light and thin notebooks are not equipped with ODD either. As a result of the popularity of cloud computing, people will increasingly rely on online storage instead of conventional mechanical storage in video and entertainment activities, and the market of conventional ODD will shrink sharply.

Higher-end cars use more micro & special motors. Due to the uncertain economic outlook, more rich people spend their money for consumption instead of investing in industry. The sales volume of high-end cars grows much faster than that of low-end cars, which is most evident in China, the largest car market in the world. China has become the largest luxury car market in the world. Higher-end cars use more micro & special motors, which also makes Japanese automotive micro & special motor manufacturers maintain stable growth despite of the earthquake and yen appreciation. Japanese manufacturers almost occupy 80% of the automotive micro & special motor market.

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