

Research Report on China's Electric Vehicle Drive Motor Industry, 2018-2022

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Abstracts

DESCRIPTION

With government support and technological progress, the global electric vehicle market is developing rapidly. The production volume increased rapidly from only 68,000 units in 2011 to 1.223 million units in 2017. The performance of the US, European and Chinese markets is excellent. With the rapid development of the global electric vehicle industry, the electric vehicle drive motor industry is also growing rapidly.

As one of the three core components of the new energy vehicle, the drive motor is mainly composed of the stator, the rotor, the housing, the connector, the resolver, etc. The drive motor and the controller constitute the core system of the new energy vehicle, i.e. the drive motor system, whose performance determines the main performance indicators such as a vehicle's climbing performance, acceleration and maximum speed. At present, the driving motors used in new energy vehicles mainly include DC motors, AC motors and switched reluctance motors. Permanent magnet synchronous motors take up the largest share of the Chinese motor market, followed by AC asynchronous motors.

In recent years, the Chinese government is vigorously advocating and has introduced a series of policies for the development of new energy vehicles, which booms the new energy vehicle industry. From 2015 to 2017, the production and sales volume of new energy vehicles (electric vehicles) in China ranked the first in the world for three consecutive years. As a result, the market size of drive motors surged from CNY 470 million in 2013 to CNY 9.27 billion in 2017. The unprecedented market prospect has led to a sharp increase in the number of industry participants and increasingly fierce market competition. The electric vehicle drive motor manufacturers in China mainly include the

enterprises that have experience in the manufacture of traditional automobiles and auto parts, for example, BYD and BAIC Group; the enterprises that have experience in the manufacture of motors for other sectors, for example, Zhongshan Broad-Ocean Motor Co., Ltd. and Jiangxi Special Electric Motor Co., Ltd.; and the motor enterprises established for new energy vehicles, for example, Shenzhen Greatland Electrics Inc. and Shanghai Dajun Technologies Inc. The costs of driving motors account for a high proportion. In the past two years, the increase in the prices of upstream raw materials and the decrease in downstream automobile prices has put great pressure on the cost control of motor enterprises.

The development of new energy vehicles (electric vehicles) is the fundamental solution to reducing environmental pollution and the reliance on fossil fuels. From 2018 to 2022, the global and Chinese electric vehicle production will continue to rise rapidly, thus creating a broad market for the drive motor industry. In 2017, the production and sales volume of electric vehicles in China accounted for more than half of the global total. It is expected that the supply of electric vehicle drive motors in China will maintain rapid growth from 2018 to 2022 and the market size will reach approximately CNY 15 billion in 2022, representing a huge market potential.

TOPICS COVERED:

Development environment of China's electric vehicle drive motor industry

Supply of and demand for electric vehicle drive motors in China

Major electric vehicle drive motor manufacturers in China

Competition in China's electric vehicle drive motor industry

Production cost trend and price trend of electric vehicle drive motors

Major driving forces and market opportunities for China's electric vehicle drive motor industry from 2018 to 2022

Forecast on the supply of and demand for new energy vehicles in China from 2018 to 2022

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COMPANIES MENTIONED

- 1 BYD Company Limited
- 2 Beijing Automotive Group Co., Ltd. ("BAIC Group")
- 3 Zhengzhou Yutong Bus Co., Ltd.
- 4 JEE Automation Equipment Co., Ltd.
- 5 United Automotive Electronic Systems Co., Ltd.
- 6 Jing-Jin Electric Technologies Co., Ltd.
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