

Global Automotive Motor Market Segmented By Product Type (DC Brushed Motor, BLDC Motor, Stepper Motor), By Vehicle Type (Passenger Car, Light Commercial Vehicle, Medium & Heavy Commercial Vehicle), By Demand Category (OEM, Aftermarket), By Application (Performance Motors, Comfort Motors, Safety Motors), By Regional, Competition Forecast & Opportunities, 2018 – 2028F

<https://marketpublishers.com/r/G529C256A9BBEN.html>

Date: October 2023

Pages: 183

Price: US\$ 4,900.00 (Single User License)

ID: G529C256A9BBEN

Abstracts

The Global Automotive Motor Market, valued at USD 35 billion in 2022, is expected to experience robust growth in the forecast period, projecting a Compound Annual Growth Rate (CAGR) of 4.8% through 2028. This market is a dynamic and pivotal sector within the automotive industry, marked by the increasing importance of motorized components in vehicles. Motors play a crucial role in powering various vehicle systems, from propulsion in electric and hybrid vehicles to supporting advanced driver assistance systems (ADAS) and enhancing overall vehicle efficiency. The market's trajectory is closely linked to broader trends of electrification, automation, and sustainability that are reshaping the automotive landscape.

Key Market Drivers

1. **Electrification of Vehicles:** One of the most significant drivers of the Global Automotive Motor Market is the ongoing shift towards vehicle electrification. Electric and hybrid vehicles are gaining traction as the automotive industry responds to stringent emissions regulations and heightened environmental awareness. Electric motors, which offer high efficiency, instant torque, and zero tailpipe emissions, are central to the

propulsion of electric and hybrid vehicles. As governments worldwide implement policies to reduce carbon emissions, automakers are investing in electric motor technology to create vehicles that meet sustainability goals and consumer demands for cleaner transportation options.

2. **Push for Energy Efficiency:** The demand for energy-efficient vehicles aligns with the growing adoption of electric motors. Electric motors inherently possess higher energy conversion efficiency compared to internal combustion engines. This efficiency translates to improved range for electric vehicles and enhanced fuel economy for hybrids. As consumers seek vehicles with lower operating costs and reduced environmental impact, the efficiency gains provided by electric motors become a significant driver for their integration into various vehicle platforms.

3. **Advancements in Electric Motor Technology:** Ongoing innovations in electric motor technology are driving the market's growth. Manufacturers are continuously improving motor design, materials, power density, and thermal management, resulting in motors that are more compact, powerful, and reliable. Brushless DC (BLDC) motors, permanent magnet synchronous motors (PMSM), and induction motors are evolving to meet diverse application requirements, contributing to improved vehicle performance and user experience.

4. **Regulatory Pressures and Emission Standards:** Stringent emissions regulations imposed by governments worldwide are compelling automakers to rethink traditional internal combustion engine (ICE) powertrains. In response to these regulations, many manufacturers are accelerating their development of electric and hybrid vehicles powered by electric motors. Regulatory pressures are reshaping the industry landscape and driving investment in motor technology that aligns with emissions reduction goals.

5. **Autonomous Driving and ADAS:** The rise of advanced driver assistance systems (ADAS) and the pursuit of autonomous driving capabilities are major drivers for the Global Automotive Motor Market. Many ADAS functionalities, such as adaptive cruise control, lane-keeping assist, and automated parking, rely on motorized components for precise control of steering, braking, and acceleration. As vehicles incorporate more automated features, the demand for motors that enable safe and reliable control in various driving scenarios increases significantly.

6. **Growing Consumer Demand for Connectivity:** The demand for connected vehicles with enhanced features such as infotainment, navigation, and over-the-air updates drives the integration of motors into various components. Electric motors power

retractable screens, adjustable seats, mirrors, and other components that enhance the overall user experience. As consumers seek vehicles that offer advanced connectivity and personalized comfort, motors play a crucial role in delivering these features.

7. R&D Investments and Technological Collaboration: Automakers, suppliers, and technology companies are investing heavily in research and development to advance motor technology. Collaborative efforts between industry players are fostering innovation and pushing the boundaries of electric motor performance, efficiency, and cost-effectiveness. These partnerships drive the development of cutting-edge solutions that meet the demands of electrification and automation.

8. Enhanced Vehicle Performance: Electric motors offer exceptional torque delivery, instantaneous acceleration, and smoother power delivery compared to traditional internal combustion engines. These attributes contribute to enhanced vehicle performance, making electric and hybrid vehicles appealing to enthusiasts seeking exhilarating driving experiences. As consumer preferences shift towards high-performance, environmentally friendly vehicles, electric motors become a key driver in fulfilling these desires.

9. Evolving Infrastructure and Charging Network: The expansion of charging infrastructure and the growing availability of charging stations for electric vehicles provide a supportive ecosystem for the adoption of electric motors. A reliable charging network reduces range anxiety and boosts consumer confidence in electric vehicles, thereby promoting the adoption of electric motors as a viable alternative to conventional powertrains.

10. Global Trend Towards Sustainability: The global movement towards sustainability, coupled with increased awareness of environmental issues, influences consumer preferences and government policies. Electric motors contribute to reducing greenhouse gas emissions and local air pollution, aligning with broader sustainability goals and prompting the automotive industry to adopt cleaner propulsion solutions.

Key Market Challenges

1. Range Anxiety and Infrastructure: In the context of electric vehicles (EVs), range anxiety remains a significant challenge. While electric motors offer advantages in terms of efficiency and instant torque, concerns about the driving range and availability of charging infrastructure can deter potential EV buyers. The need for a robust charging network, fast-charging solutions, and longer-range battery technology is essential to

alleviate range anxiety and drive widespread EV adoption.

2. **Battery Technology and Energy Density:** Electric motors in EVs rely on battery technology for energy storage. The development of advanced battery chemistries with higher energy density is crucial to improving the driving range and overall performance of EVs. The interplay between electric motor efficiency and battery technology poses a complex challenge, as both components need to be optimized for optimal vehicle performance.

3. **Cost and Affordability:** The cost of electric motors and associated components can pose a challenge to achieving price parity with internal combustion engine (ICE) vehicles. While electric motor costs have been decreasing, they remain a significant factor in the overall cost of EVs. Automakers and suppliers must work to further reduce the cost of electric motors while maintaining quality and performance to make EVs more accessible to a broader range of consumers.

4. **Vehicle Weight and Space Constraints:** The integration of electric motors, batteries, and associated systems can impact vehicle weight and space constraints. Electric motors are generally heavier than their internal combustion counterparts, and the addition of large battery packs can further contribute to weight challenges. Finding ways to balance the weight distribution, optimize vehicle architecture, and accommodate motor components without sacrificing performance or interior space is an ongoing challenge.

5. **Thermal Management:** Electric motors generate heat during operation, which can impact efficiency, performance, and longevity. Effective thermal management is essential to ensure the optimal functioning of electric motors and prevent overheating. Designing cooling systems that effectively manage heat dissipation while minimizing energy consumption remains a critical challenge, particularly in high-performance or high-duty cycle applications.

6. **Charging Infrastructure Development:** For the success of electric vehicles, a well-developed and accessible charging infrastructure is paramount. The challenge lies in the need for a seamless charging experience, consistent charging standards, and convenient access to charging stations across various regions. Collaborative efforts among governments, automakers, and infrastructure providers are necessary to accelerate the expansion of the charging network.

7. **Consumer Perception and Education:** Educating consumers about the benefits and

capabilities of electric motors is crucial for wider adoption. Addressing misconceptions, dispelling myths, and showcasing the advantages of electric vehicles, including their efficiency, reduced operating costs, and environmental benefits, can play a pivotal role in changing consumer perceptions and driving market acceptance.

8. Complexity of Hybrid Systems: Hybrid vehicles combine internal combustion engines with electric motors, creating complex powertrain systems. Integrating these components seamlessly while

ensuring optimal performance and efficiency poses a challenge. Manufacturers must navigate the intricacies of hybrid powertrains, including managing power delivery, regenerative braking, and transitioning between electric and gasoline modes.

9. Standardization and Compatibility: The Global Automotive Motor Market encompasses various motor types, designs, and technologies. Ensuring compatibility and standardization among different electric motor systems is a challenge, particularly as the industry evolves rapidly. Establishing common interfaces, communication protocols, and mechanical connections can facilitate the integration of motors into vehicles and enhance interoperability.

10. Recycling and Sustainability: As the adoption of electric vehicles grows, the recycling and disposal of electric motors and associated components pose sustainability challenges. Developing processes for the responsible recycling of motors and batteries, as well as minimizing the environmental impact of motor production, is essential for the long-term sustainability of the automotive industry.

Key Market Trends

1. Electrification as a Dominant Trend: The widespread adoption of electrification is a dominant trend shaping the Global Automotive Motor Market. Electric vehicles (EVs) and hybrid vehicles are becoming increasingly popular as automakers respond to tighter emissions regulations and growing environmental consciousness. Electric motors are at the heart of these electrified powertrains, driving propulsion and providing torque. This trend is spurring the development of more efficient, powerful, and compact electric motors to meet the evolving needs of electrified vehicles.

2. Shift towards E-Mobility Solutions: Beyond passenger cars, electric motors are also powering a range of electric mobility solutions, including electric buses, trucks, and even two-wheelers. The trend toward cleaner transportation alternatives in urban areas is

driving the adoption of electric mobility solutions that rely on electric motors. This trend contributes to reduced emissions, quieter operation, and improved air quality in densely populated regions.

3. **Growing Role in Autonomous Driving:** The advent of autonomous driving is reshaping the role of motors within vehicles. Electric motors are instrumental in powering various components necessary for autonomous operation, including steering systems, throttle control, and braking. The transition to self-driving vehicles is accelerating the integration of electric motors into systems that support advanced driver assistance and autonomous functionality.

4. **High-Efficiency and Lightweight Designs:** Automotive manufacturers are focused on optimizing vehicle efficiency, and electric motors play a crucial role in achieving this goal. Continuous advancements in motor technology, including improvements in power density and energy conversion efficiency, allow automakers to design more efficient vehicles with extended range and reduced energy consumption. Additionally, lightweight materials and compact motor designs contribute to overall vehicle weight reduction, further enhancing efficiency.

5. **Magnet-Free and Rare Earth Alternatives:** The Global Automotive Motor Market is witnessing a trend towards magnet-free motor designs and the exploration of rare-earth-free alternatives. Traditional motors often utilize rare earth materials, which can be expensive and environmentally challenging to extract. Innovations are centered on developing motor designs that do not rely on these materials, while maintaining performance and cost-effectiveness.

6. **Integration into Vehicle Connectivity:** Motors are being integrated into various vehicle components beyond propulsion. They are powering elements of vehicle connectivity and user experience, such as adjustable seats, power windows, and retractable screens. This integration enhances convenience and comfort for occupants while offering automakers additional opportunities to differentiate their vehicles through personalized features.

7. **Dual-Motor and All-Wheel Drive Configurations:** Dual-motor and all-wheel drive configurations are gaining prominence, especially in electric vehicles. By placing an electric motor on each axle, vehicles can achieve improved traction, stability, and dynamic performance. This trend is particularly noticeable in electric SUVs and high-performance vehicles, where electric motors contribute to enhanced driving experiences and control.

8. **Integration with Energy Management Systems:** In electric vehicles, motors are closely integrated with energy management systems and regenerative braking technology. Motors function as generators during braking, converting kinetic energy into electrical energy that can be stored in the vehicle's battery. This regenerative process enhances energy efficiency and extends the driving range of EVs.

9. **Collaborative Innovation and Partnerships:** The Global Automotive Motor Market is characterized by collaborative innovation among automakers, suppliers, and technology companies. Partnerships are formed to leverage combined expertise in motor design, electronics, and vehicle integration. These collaborations drive the development of cutting-edge motor solutions that align with the industry's electrification and connectivity goals.

10. **Continuous Research and Development:** Ongoing research and development efforts are propelling the evolution of electric motor technology. Manufacturers are investing in improving motor efficiency, thermal management, power density, and manufacturing techniques. This focus on R&D ensures that electric motors continue to meet the evolving demands of the automotive industry, contributing to the advancement of vehicle performance and sustainability.

Segmental Insights

Product Type Insights: The global Automotive Motor market is segmented into various product types, each with distinct characteristics and market dynamics. The major categories include brushed DC motors, brushless DC motors, and stepper motors, amongst others. Brushed DC motors, known for their simplicity and cost-effectiveness, have a substantial share in the market. However, brushless DC motors are gaining traction due to their higher efficiency and longevity. Stepper motors, with their precise positioning capability, are the choice for applications requiring meticulous control. Understanding these product type insights is crucial for comprehending the broader market trends.

Vehicle Type Insights: The global Automotive Motor market is diversified into various vehicle types, including passenger cars, commercial vehicles, and electric vehicles. Each of these segments plays an essential role in the overall market dynamics. Passenger cars constitute a significant share of the market due to their high global production rate and widespread use. Commercial vehicles, on the other hand, are driven by the increasing demands in logistics and transportation sectors. Meanwhile, the

electric vehicle segment indicates promising growth prospects, fueled by environmental concerns and advancements in battery technology. With the continuous evolution in the automotive industry, these trends are expected to shape the future of the Automotive Motor market.

Regional Insights: The global automotive motor market exhibits regional diversity in terms of demand, production, and technological advancements. In the Asia-Pacific region, driven by countries like China and India, the demand for automotive motors is significantly high due to a rapidly growing automotive sector and increased consumer spending on vehicles. Further, Europe holds a substantial share in the market, with Germany playing a pivotal role, thanks to the presence of globally renowned automobile manufacturers. The North American region, with its focus on eco-friendly and fuel-efficient vehicles, boosts the demand for electric automotive motors. These regional trends offer insights into understanding the dynamics of the global automotive motor market.

Key Market Players

ROBERT BOSCH GmbH

BORGWARNER INC

VALEO

MAGNA INTERNATIONAL INC

JOHNSON ELECTRIC HOLDINGS LIMITED

DENSO CORPORATION

CONTINENTAL AG

SIEMENS AG

Report Scope:

In this report, the Global Automotive Motor Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Automotive Motor Market, By Product Type:

DC Brushed Motor

BLDC Motor

Stepper Motor

Global Automotive Motor Market, By Vehicle Type:

Passenger Car

Light Commercial Vehicle

Medium & Heavy Commercial Vehicle

Global Automotive Motor Market, By Demand Category:

OEM

Aftermarket

Global Automotive Motor Market, By Application Type:

Performance Motors

Comfort Motors

Safety Motors

Global Automotive Motor Market, Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Mexico

Canada

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Motor Market.

Available Customizations:

Global Automotive Motor Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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