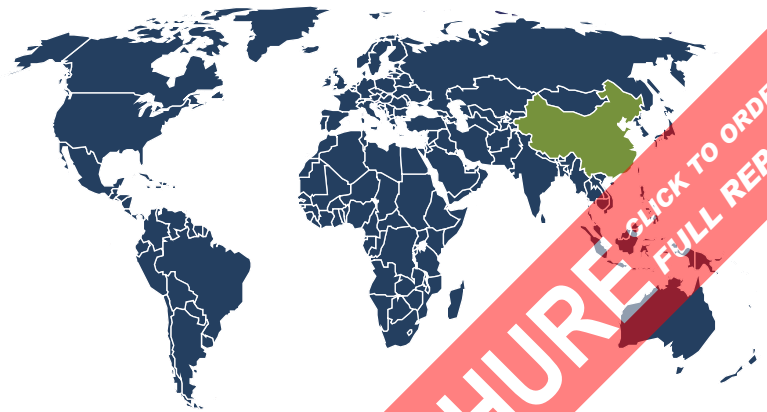




Freedonia Focus Reports
Global Collection

Electric Motors: China

June 2019



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Technological Trends	6
Legal & Regulatory Factors	8
Asia/Pacific Regional Outlook	9
3. Segmentation & Forecasts	10
Products	10
Alternating Current	12
Direct Current	13
Markets	15
Household Appliances	16
Heating & Cooling Equipment	16
Machinery	17
Motor Vehicles	18
Other Markets	19
4. Industry Structure	21
Industry Characteristics	21
Market Leaders	22
Harbin Electric (哈尔滨电气集团有限公司)	23
Nidec	23
Wolong Holding (卧龙控股集团)	24
5. About This Report	26
Scope	26
Sources	26
Industry Codes	27
Freedonia Methodology	27
Resources	29

List of Tables & Figures

Figure 1 China: Key Trends in the Electric Motor Market, 2018 – 2023	3
Figure 2 China: Electric Motor Demand Trends, 2008 – 2018	4
Table 1 China: Key Indicators for Electric Motor Demand, 2008 – 2023 (2017US\$ bil)	5
Figure 3 Asia/Pacific: Electric Motor Demand by Country, 2018 (%)	9
Figure 4 China: Electric Motor Demand by Product, 2008 – 2023 (US\$ mil)	10
Table 2 China: Electric Motor Demand by Product, 2008 – 2023 (US\$ mil)	10
Figure 5 China: Electric Motor Demand by Product, 2008 – 2023 (%)	14
Figure 6 China: Electric Motor Demand by Market, 2008 – 2023 (US\$ mil)	15
Table 3 China: Electric Motor Demand by Market, 2008 – 2023 (US\$ mil)	15
Figure 7 China: Electric Motor Demand by Market, 2008 – 2023 (%)	20
Table 4 China: Selected Suppliers to the Electric Motor Market	23
Table 5 HS Codes Related to Electric Motors	27

About This Report

Scope

This report forecasts to 2023 electric motor (电动机) demand in nominal US dollars at the manufacturer level in China. Total demand is segmented by product in terms of:

- alternating current (AC) motors - including breakouts for fractional and integral motors
- direct current (DC) motors - including breakouts for fractional and integral motors

Total demand is also segmented by market as follows:

- household appliances
- heating and cooling equipment
- machinery
- motor vehicles
- other markets such as aerospace and other transportation equipment, computers and other electronic products, and medical and scientific instruments

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

For the purposes of this report, universal motors are categorized as DC motors.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Electric Motors: China (FC45044) is based on *Global Electric Motors*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press

About This Report

- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | HS Codes Related to Electric Motors

HS Code	Definition
850110	Electric motors <37.5 watts
850120	Universal AC/DC electric motors >37.5 watts
850131	DC electric motors/generators <750watts
850132	DC electric motors/generators >750 watts but <75 kilowatts
850133	DC electric motors/generators >75 kilowatts but <375 kilowatts
850134	DC electric motors/generators >375 kilowatts
850140	AC single-phase electric motors
850151	AC multiphase electric motors <750 watts
850152	AC multiphase electric motors >750 watts but <75 kilowatts
850153	AC multiphase electric motors >75 kilowatts
851140	ICE starter electric motors & dual purpose starter-generators

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Electric Motors

Freedonia Industry Studies

Clothes Washers & Dryers in the US

Global Buses

Global Commercial Refrigeration Equipment

Global HVAC Equipment

Global Hybrid & Electric Vehicles

Global Power Tools

Global Pumps Market

North America Automotive Aftermarket

North American Medium- & Heavy-Duty Truck Aftermarket

Freedonia Focus Reports

Bearings: China

Civil Aircraft: United States

Global Light Vehicles

Global Macroeconomy

Global Medium- & Heavy-Duty Vehicles

Pumps: China

Small Kitchen Appliances: United States

Freedonia Custom Research

Trade Publications

Air Conditioning, Heating & Refrigeration NEWS

ASSEMBLY

Automotive News

Design News

Drives & Controls

Power Transmission Engineering

Ward's Automotive

Agencies & Associations

China Association of Automobile Manufacturers

China Household Electrical Appliances Association

International Electrotechnical Commission

National Electrical Manufacturers Association

United Nations Comtrade