



**China EV (Electric Vehicle) Motor Controller
Market Report, 2014**

Dec. 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

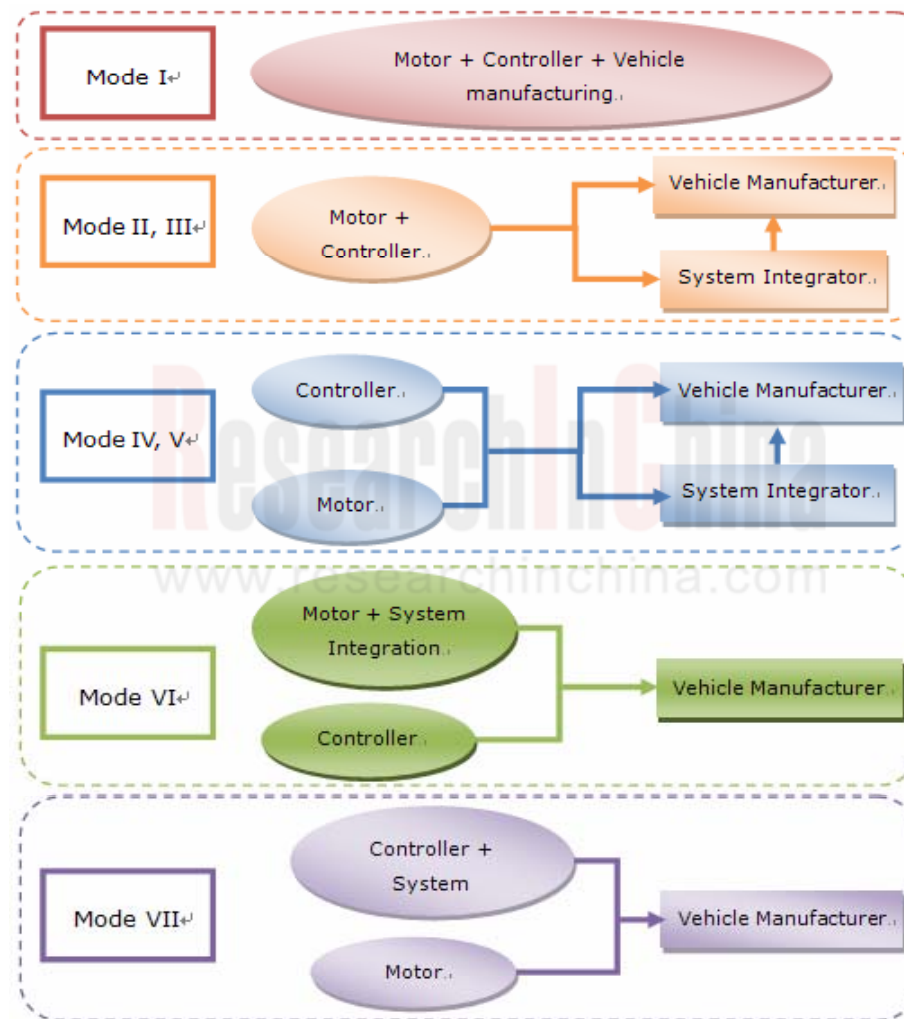
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

A motor controller is a device that serves to govern energy transmission between traction power source and the motor, being one of the core components of electric vehicle. With the development of electric vehicle market, the demand for EV motor controllers in China has been on the rise. In 2013, China's EV motor controller demand approached 18,000 sets, with the market size reaching RMB331 million. It is projected that by 2017 this figure will rise to 280,000 sets and that the market size will hit RMB4.6 billion, with an AAGR of as much as 93%.

At present, China's EV motor controllers are at the initial stage, but the market demand showed a sound development trend, with a higher profitability. Take example for Shenzhen Inovance Technology and Shenzhen V&T Technologies, whose gross margins are over 45%. As the EV market size expands, the profit margin for EV motor controllers is facing certain downward pressure. But in the short term, it will be at a relatively higher level. Considerable profitability and fast-growing market demand drive a number of domestic enterprises to speed up the construction of related projects.

In terms of supply mode, China's electric vehicle drive motors, motor controllers, system integration, and vehicle manufacturers are characterized by diversified supply relationship, which can be roughly divided into the following categories:



Mode I: internal supply. That is, the vehicle manufacturers that produce drive motors and controllers internally provide supported equipment. Take example for BYD and Hunan CSR Times Electric Vehicle, which offer internal supply of a variety of equipment, ranging from motors and controllers to vehicle manufacturing.

Mode II and III: The enterprises produce both drive motors and controllers like Shanghai Edrive, Dajuntech, and Jing-Jin Electric supply products directly to vehicle manufacturers (Mode II), or directly to system integrators, which then provide them to vehicle manufacturers (Mode III).

Mode IV and V: Vehicle manufacturers produce products by assembling the purchased drive motors and controllers (Mode IV); or system integrators purchase drive motors and controllers separately, which are later assembled and supplied to vehicle manufacturers. The independent motor controller manufacturers mainly include Shenzhen Inovance Technology and Shenzhen V&T Technologies, etc.

Mode VI: Vehicle manufacturers purchase products from motor manufacturers and controller manufacturers, and at the same time motor manufacturers provide system integration. Fugong EV Tech and Siemens are the representatives of the manufacturers that offer both drive motors and system solutions.

Mode VII: Vehicle manufacturers purchase products from both motor manufacturers and controller manufacturers, and controller manufacturers provide system integration.

Shanghai Edrive is so far the largest EV electric drive system supplier in China, with annual capacity of 30,000 sets of motor system. Moreover, it also has developed motor controllers suitable for various electric vehicles, making it the leader in this field. The company's products find wide application among the vehicle manufacturers, such as FAW Group, GAC Group, Chery, Dongfeng, Chang'an, Brilliance, Geely, Great Wall Motor, SAIC, Shanghai GM, and BAIC, with its clients accounting for 80% of the total auto makers in China.

Shenzhen Inovance Technology is one of major industrial inverter and controller suppliers in China. In 2009, the company set up a new-energy technical team and began to penetrate new energy industry. In October 2009, the company launched EV driver and made successful experiment in 5 customers. In 2013, the company completed a roughly RMB120 million order of motor controllers for new-energy vehicle. From January to September 2014, benefiting from favorable policies and sales support from big clients, motor controllers for new energy automobiles generated sales revenue of RMB140 million, a substantial growth from the same period of last year.

China EV (Electric Vehicle) Motor Controller Market Report, 2014 by ResearchInChina covers the following:

- Market status of electric vehicles in China, including output, sales volume, market structure, and major policies;
- Overview of China's motor controller industry, including product overview, product classification, policy environment, and development trend;
- Market status of motor controllers in China, including market size, industry profit, modes of supply, as well as development of key businesses;
- Development of leading motor controller manufacturers in China, including corporate revenue, profit, revenue from electric vehicles, earnings, as well as product type and industry development of motor controllers, etc.;
- Global suppliers of IGBTs and inverters for motor controllers, including corporate revenue, profit, and EV development strategies, etc.

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