

Global Small-Sized Motor Market: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on small-sized motor market with the following conditions:

1. Research period: From May to September, 2011
2. Research target: Manufacturers of small-sized motors in Japan and overseas
3. Research methodologies: Face-to-face interviews by the specialized researchers, survey via telephone/email and literature research

What is the small-sized motor market?

This research targeted 18 manufacturers of small-sized motors in and out of Japan and surveyed the following motors: DC brush motors (cored) DC brush motors (coreless), vibration motors, brushless DC motors, PM stepper motors, HB stepper motors, DC axial fans and AC induction motors.

◆ Key Findings

■ Global sales of small-sized motors are expected to reach 10,472.41 million units in FY2011

The small-sized motor market in FY 2009 shrank from the previous year due to influence of the Lehman's fall. However, the market has gradually recovered and is likely to be on a growth path once again. In FY2010 most of small-sized motors showed rebound from the slump to gain estimated two-digit-percent growth.

In addition to recovery of existing in-vehicle application demands, there are moves to suggest the motors to be applied in new fields. The moves stem from growing needs in environmental protection and energy saving which are driving to explore the potentiality of industrial motors to contribute in wider range of fields. Since each of motor types is estimated to increase in FY2011, the entire small-size motor market is likely to exceed the shipment volume that recorded in FY2008, though the growth rate may slow down.

■ Global sales in FY2013 is estimated to be 12,349.43 million units

The global growth of small-sized motors is predicted to continue even after FY2012, and exceed 12 billion units by FY2013. It is because increasing needs of consumer devices and home electronics in the emerging and developing countries are expected to boost the shipment volume of small-sized motors.

Moves of new application in industrial equipments driven by the energy-saving trends (e.g. replacement from hydraulic or air cylinders to motor-driven electric cylinders) are also contributing in increasing the demand.

◆ Report format

Published report: "Small Motors Market 2011"

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Language: Japanese

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Price: 136,500 yen (6,500 yen of consumption tax shall be charged for the sales in Japan.)

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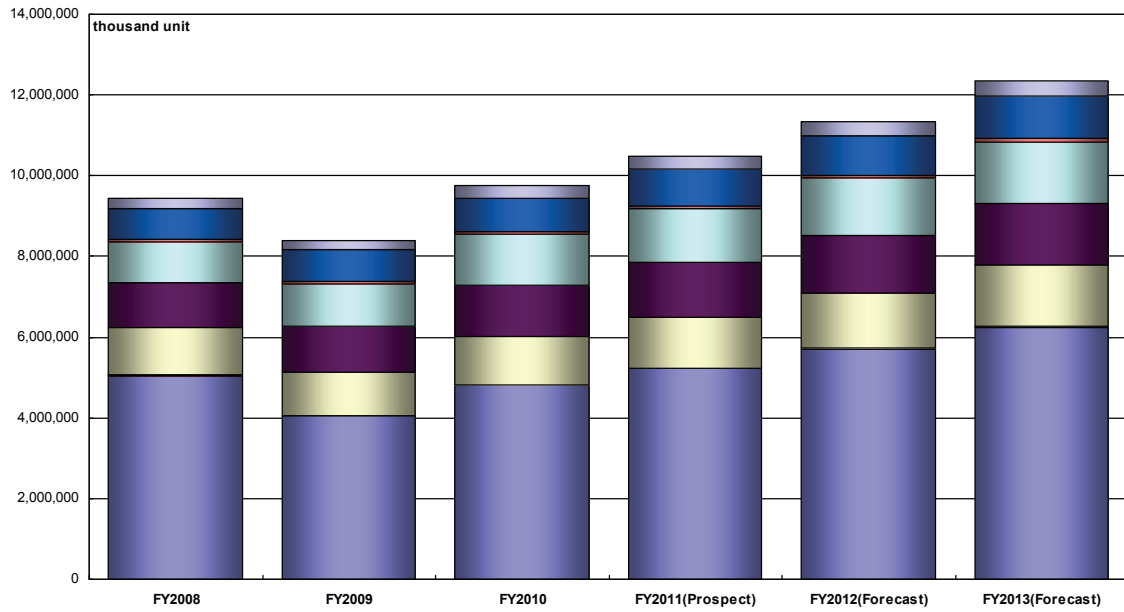
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■ Transition of size of small-sized motor market surveyed from 18 global manufacturers (Volume : From actual values of FY2008 to Forecast values of FY 2013)

	FY2009		FY2010		FY2011(Prospect)		FY2012(Forecast)		FY2013(Forecast)	
	year-on-year		year-on-year		year-on-year		year-on-year		year-on-year	
DC brush motors (cored)	4,050,700	80.2%	4,813,770	118.8%	5,224,860	108.5%	5,708,000	109.2%	6,242,000	109.4%
	48.2%		49.4%		49.9%		50.3%		50.5%	
DC brush motors (coreless)	11,880	97.6%	12,455	104.8%	13,170	105.7%	14,000	106.3%	14,900	106.4%
	0.1%		0.1%		0.1%		0.1%		0.1%	
Vibration motors	1,075,000	91.3%	1,183,800	110.1%	1,252,000	105.8%	1,375,000	109.8%	1,544,000	112.3%
	12.8%		12.2%		12.0%		12.1%		12.5%	
Brushless DC motors	1,136,165	101.4%	1,274,150	112.1%	1,355,835	106.4%	1,437,000	106.0%	1,525,000	106.1%
	13.5%		13.1%		12.9%		12.7%		12.3%	
PM stepper motors	1,057,000	107.0%	1,260,800	119.3%	1,336,000	106.0%	1,411,000	105.6%	1,504,000	106.6%
	12.6%		12.9%		12.8%		12.4%		12.2%	
HB stepper motors	56,500	90.4%	68,850	121.9%	73,020	106.1%	77,900	106.7%	83,200	106.8%
	0.7%		0.7%		0.7%		0.7%		0.7%	
DC axial fans	770,000	100.0%	839,500	109.0%	902,700	107.5%	978,700	108.4%	1,066,530	109.0%
	9.2%		8.6%		8.6%		8.6%		8.6%	
AC induction motors	250,400	96.2%	289,100	115.5%	314,825	108.9%	342,000	108.6%	369,800	108.1%
	3.0%		3.0%		3.0%		3.0%		3.0%	
Total	9,440,995	8,407,645	89.1%	9,742,425	115.9%	10,472,410	107.5%	11,343,600	108.3%	12,349,430
	100.0%	100.0%		100.0%		100.0%		100.0%		100.0%



Notes:

- 1: Based on shipment volume at leading 18 manufacturers.
- 2: (Prospect) is a prospected value, and (Forecast) is a forecast value.
- 3: Vibration motors are not included in DC brush motors (cored) and DC brush motors (coreless.)
- 4: Actual values in FY 2008 has retroactively been reviewed.