

China Rare Earth Permanent Magnet Industry Report, 2010-2011

Sep. 2011

This report

- ◆ **Analyzes the rare earth supply in China**
- ◆ **Focuses on the development of rare earth permanent magnet materials industry in China and market segments**
- ◆ **Highlights the operation of rare earth permanent magnet materials enterprises**

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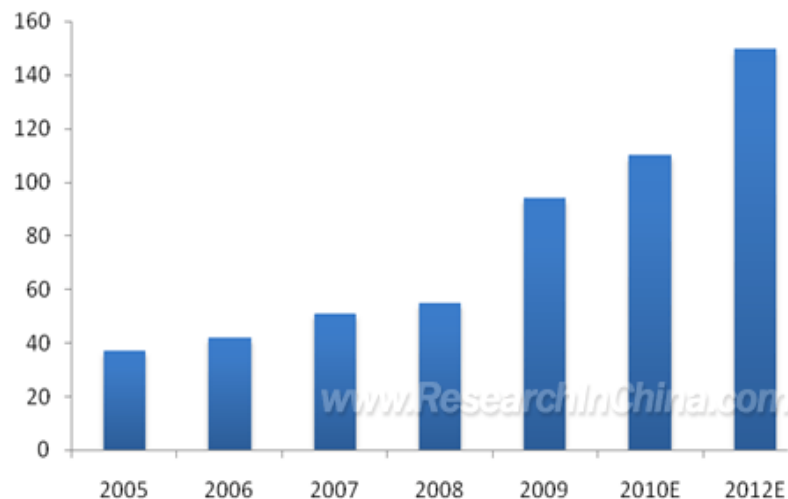
China Rare Earth Industry Report, 2010-2011

Abstract

In recent years, the global market of rare earth permanent magnet materials has witnessed robust demand and supply on the whole. Relying on its rare earth resources, China maintains rapid growth in NdFeB output which accounts for more than 80% of the global total. In 2009, China's NdFeB output reached 94,000 tons and the figure was estimated at approximately 110,000 tons in 2010.

Meanwhile, Chinese enterprises such as Zhong Ke San Huan and ZHmag are narrowing the gap with Japanese manufacturers in the development of high-performance NdFeB products. Chinese NdFeB products have enhanced their global market competitiveness significantly, and occupied over 30% of the global high-performance NdFeB market in 2009.

NdFeB Output of China, 2005-2012E (Unit: kiloton)



Source: ResearchInChina

At present, two factors are favorable to the development of China's rare earth permanent magnet industry. Firstly, the patent barriers in European, American and Japanese markets which restrict Chinese exports of rare earth permanent magnet materials have been basically broken down, except for 3 composition patents for rare earth magnet materials which will expire in 2014 in American market. Secondly, China's NdFeB product mix has been optimized, with the newly-added capacity concentrating on high-performance NdFeB products for wind power equipment, new energy vehicles and energy-saving home appliances.

As for NdFeB manufacturers, Chinese NdFeB enterprises showed strong cost pass-through capability in H1 2011. When the prices of rare earth materials including praseodymium and neodymium skyrocketed, major manufacturers such as Zhong Ke San Huan and Ningbo Yunsheng still realized stable growth in operating revenue by raising the selling prices of NdFeB materials.

Operating Revenue and Growth Rate of Major Rare Earth Permanent Magnet Material Manufacturers in China, H1 2011 (Unit: RMB mln)

Company	Operating Revenue	YoY Growth Rate
Zhong Ke San Huan	1781	72.06%
Ningbo Yunsheng	1423	65.04%
Taiyuan Twin Tower Aluminum Oxide	580	77.88%
AT&M	1847	15.64%
Sinosteel Anhui Tianyuan Technology	329	33.50%
ZHmag	486	59.73%

Source: ResearchInChina

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