



China Rare Earth Permanent Magnet Industry Report, 2012-2015

Aug. 2013

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.

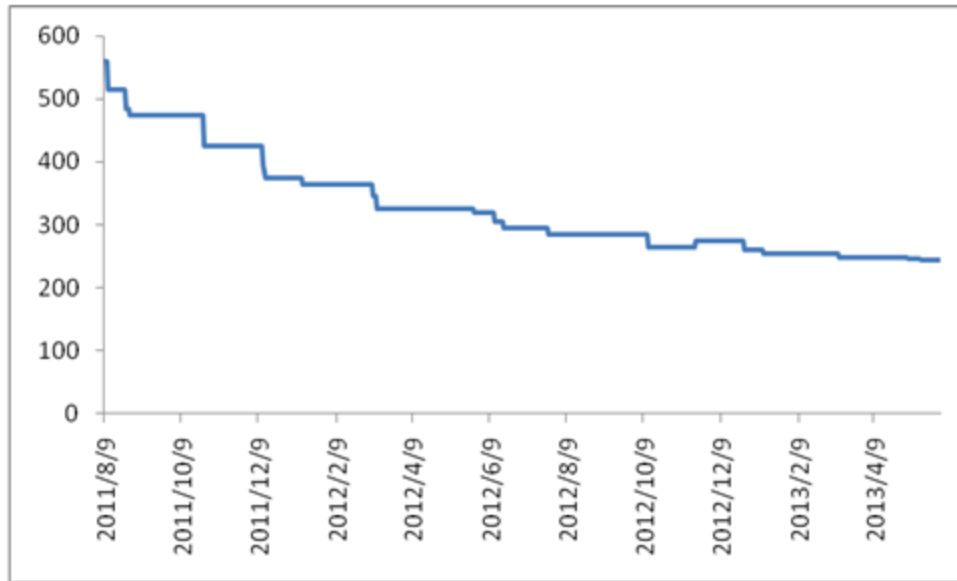
INFORMATION SOURCES

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

Abstract

Amid the global economic downturn and the falling prices of upstream rare earth raw materials and NdFeB products, the demand for downstream NdFeB dropped dramatically in 2012. China's NdFeB apparent consumption will rebound stably in the wake of the recovered demand in consumer electronics, automotive motors and other major downstream industries since 2013.

Market Price of Rough Sintered NdFeB (N52), 2011-2013 (Unit: RMB / kg)



Source: www.smm.cn;

China Rare Earth Permanent Magnet Industry Report, 2012-2015 analyzes the global and Chinese rare earth permanent magnet markets as well as forecasts development trends from the angles of rare earth raw material supply, rare earth permanent magnet supply and demand, market prices and major production enterprises.

In H1 2012, the operating rate of China NdFeB industry was less than 50%. High-end NdFeB manufacturers maintained the operating rate as high as 70%-75%, while low-end NdFeB companies only saw 30%-40%. Since 2013, downstream industries have transferred from “de-stocking” to “re-stocking”, which stimulated the growth in orders for NdFeB and boosted the industrial operating rate obviously. In Q2 2013, the operating rate of major Chinese NdFeB producers returned to 70-80%.

By 2014 when the patent licenses of Japanese Sumitomo and U.S. Magnequench will expire in European, American and Japanese NdFeB markets, Chinese NdFeB enterprises will witness breakthroughs in export, but eight of them who hold export patent licenses (including Zhong Ke San Huan and Ningbo Yunsheng) will also face fierce competition herein.

As China's largest manufacturer of magnetic materials, Zhong Ke San Huan mainly produces NdFeB, with the sintered NdFeB capacity of 13,500 tons which represents the highest level in China and the bonded NdFeB capacity of 1,500 tons. In 2012, the company invested in three production bases located in Beijing, Tianjin and Ningbo to expand capacity.

The world's largest bonded NdFeB magnet manufacturer Galaxy Magnets focuses on the Japanese and South Korean markets, serving Nidec, JVC, Sony, Mitsumi, LG, Moatech, Delta Electronics, SAIA-Burgess and other international companies.

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