

**Global and China NdFeB Industry  
Report, 2014-2018**

**Sep. 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

As the third-generation rare earth permanent magnet material, NdFeB is featured with small size, light weight, strong magnetic force and other characteristics as well as widely used in consumer electronics, transportation, wind power, automobile, medical equipment and other fields.

The growth of China's downstream demand for new energy vehicles and wind power equipment, the tightened supply of rare earth material and other factors have boosted the global NdFeB capacity to by degrees shift to China in recent years. In 2013, China's NdFeB output was 94 kt, accounting for 91.0% of the global output; wherein, China's high-performance NdFeB output hit 22 kt, sharing 54.3% of the global total.

As for companies, Hitachi Metals, Shin-Etsu Chemical and TDK have monopolized 48% share of the world's high-performance NdFeB market.

**Hitachi Metals** holds 615 patents as the world's largest manufacturer of high-performance NdFeB. As of the end of 2013, it had authorized eight Chinese NdFeB companies with 149 patents, of which four ones had been expired. Currently, all NdFeB production bases of Hitachi Metals are located in Japan, while its subsidiaries/branches

The high-performance NdFeB of **Shin-Etsu Chemical** are mainly used in hybrid cars, EPS, VCM, consumer electronics and other fields. In early 2013, the company put its Hybrid Car-Use NdFeB Production Base Project (Phase I) in Fujian into production with the annual output of 3 kt of rare earth magnetic alloy sheets which are completely exported to Japan.

In addition to Japanese companies, Zhong Ke San Huan, Zhenghai Magnetic Material, Ningbo Yunsheng, Baotou Steel Rare-earth and other Chinese key enterprises also highlight high-performance NdFeB and have launched a number of projects to enhance the high-performance NdFeB capacity.

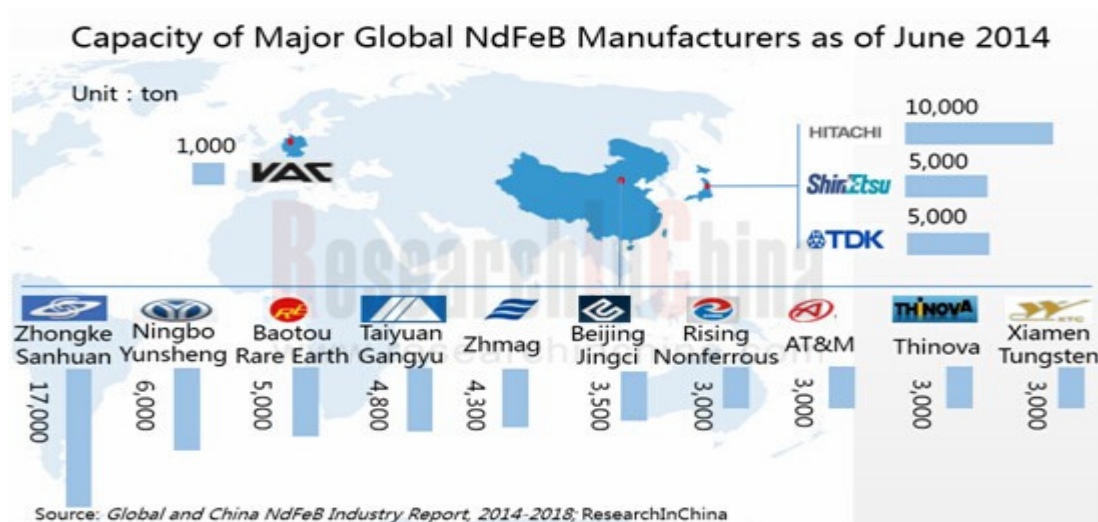
**Zhong Ke San Huan:** The company acts as China's largest NdFeB manufacturer. At the end of August 2014, the company's subsidiary Tianjin Sanhuan Lucky New Material Inc. planned to invest RMB200 million in building a 2 kt/a high-performance NdFeB automated production line, and expand its capacity to 5kt/a in accordance with market demand.

**Zhenghai Magnetic Material:** Early in 2012, it lavished RMB190 million in expanding high-performance NdFeB permanent magnet capacity. The project is expected to be completed in December 2014, with the additional high-performance NdFeB capacity of 2 kt/a.

**Baotou Steel Rare-earth:** It accomplished the commissioning of 15 kt/a NdFeB Strip Casting Alloy and 5 kt/a NdFeB Magnet Project (Phase II) in May 2014, and the products will be mainly used for wind power generation, high-end permanent magnetic resonance imaging devices, automotive motors and other high-end areas.

The report focuses on the following:

- The global NdFeB market size, market structure, competitive landscape, etc.;
- Chinese NdFeB market size, market structure, competition, import and export, etc.;
- Downstream NdFeB demand, competition pattern, etc.;
- Operation of 5 global and 15 Chinese NdFeB manufacturers.



### 1. Introduction to NdFeB Industry

- 1.1 Definition
- 1.2 Product Category
- 1.3 Industry Chain

### 2. Status Quo of Global NdFeB Market

- 2.1 Market Size
- 2.2 Market Structure
- 2.3 Competition Pattern

### 3. Status Quo of Chinese NdFeB Market

- 3.1 Industrial Policy
- 3.2 Market Size
- 3.3 Market Structure
- 3.4 Cost Structure
- 3.5 Import and Export
  - 3.5.1 Import
  - 3.5.2 Export
- 3.6 Competition Pattern

### 4. Upstream and Downstream of NdFeB Industry

- 4.1 Raw Material Price
- 4.2 Application Fields
  - 4.2.1 New Energy Vehicles
  - 4.2.2 Wind Power Equipment
  - 4.2.3 Inverter Air Conditioners

### 5. Major Foreign NdFeB Manufacturers

- 5.1 Hitachi Metals
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 NdFeB Business
  - 5.1.5 Layout in China
- 5.2 Shin-Etsu Chemical
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 NdFeB Business
- 5.3 TDK
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Revenue Structure
  - 5.3.4 NdFeB Business
- 5.4 Other Enterprises
  - 5.4.1 Seiko Epson
  - 5.4.2 VAC

### 6. Major Chinese NdFeB Manufacturers

- 6.1 Beijing Zhong Ke San Huan
  - 6.1.1 Profile
  - 6.1.2 Operation
  - 6.1.3 Revenue Structure
  - 6.1.4 NdFeB Business

- 6.1.5 Development
- 6.2 Yantai Zhenghai Magnetic Material
  - 6.2.1 Profile
  - 6.2.2 Operation
  - 6.2.3 Revenue Structure
  - 6.2.4 NdFeB Business
  - 6.2.5 R & D
  - 6.2.6 Main Projects
- 6.3 Ningbo Yunsheng
  - 6.3.1 Profile
  - 6.3.2 Operation
  - 6.3.3 Revenue Structure
  - 6.3.4 NdFeB Business
  - 6.3.5 Development Strategy
- 6.4 AT & M
  - 6.4.1 Profile
  - 6.4.2 Operation
  - 6.4.3 Revenue Structure
  - 6.4.4 NdFeB Business
  - 6.4.5 Development
- 6.5 Inner Mongolia Baotou Steel Rare-earth
  - 6.5.1 Profile
  - 6.5.2 Operation
  - 6.5.3 Revenue Structure
  - 6.5.4 Gross Margin
  - 6.5.5 NdFeB Business
  - 6.5.6 Development

6.6 Xiamen Tungsten	6.10.1 Profile
6.6.1 Profile	6.10.2 Operation
6.6.2 Operation	6.10.3 Revenue Structure
6.6.3 Revenue Structure	6.10.4 Gross Margin
6.6.4 NdFeB Business	6.10.5 NdFeB Business
6.7 Taiyuan Twin-Tower Aluminum Oxide	6.11 Chengdu Galaxy Magnets
6.7.1 Profile	6.11.1 Profile
6.7.2 Operation	6.11.2 Operation
6.7.3 Revenue Structure	6.11.3 Revenue Structure
6.7.4 Gross Margin	6.11.4 NdFeB Business
6.7.5 NdFeB Business	6.11.5 Main Projects
6.7.6 Development	6.12 Other Enterprises
6.8 Sinosteel Anhui Tianyuan Technology	6.12.1 Tianjin Jinbin New Material Industry Co., Ltd.
6.8.1 Profile	6.12.2 Yantai Shougang Magnetic Materials Co., Ltd.
6.8.2 Operation	6.12.3 Beijing Jingci Magnet
6.8.3 Revenue Structure	6.12.4 Beijing Thinova
6.8.4 NdFeB Business	
6.8.5 Main Projects	<b>7. Summary and Forecast</b>
6.9 Rising Nonferrous Metals	7.1 Market
6.9.1 Profile	7.2 Enterprises
6.9.2 Major Customers	
6.9.3 Operation	
6.9.4 Revenue Structure	
6.9.5 Gross Margin	
6.9.6 NdFeB Business	
6.9.7 Development	
6.10 Zhongshan Broad-Ocean Motor	

- Elements of NdFeB
- Performance Comparison between NdFeB Permanent Magnet Materials and Counterparts
- Classification of NdFeB
- NdFeB Industry Chain
- Proportion of Bonded NdFeB Downstream Applications, 2013
- Expiration of Main Global NdFeB Patents
- Enterprises Holding Authorized NdFeB Patents in China, by H1 2014
- Global NdFeB Output and Growth Rate, 2008-2018E
- Global High-performance NdFeB Output, 2008-2018E
- Global NdFeB Output Structure (by Country), 2013
- Global High-performance NdFeB Output Structure (by Country), 2013
- Global Downstream NdFeB Consumption Structure, 2013
- Global High-performance NdFeB Market Competition Pattern, 2013
- Global High-performance NdFeB Competition Pattern, 2016E
- NdFeB-related Industrial Policies in China, 2000-2014
- China's NdFeB Output and Growth Rate, 2006-2018E
- China's High-performance NdFeB Output and Growth Rate, 2007-2014
- China's NdFeB Capacity Distribution, 2014
- China's High-performance NdFeB Demand (by Field), 2010-2014
- China's NdFeB Cost Structure, 2013
- Import Volume and Value of NdFeB and Related Products, 2011-2014
- Import Value Structure of NdFeB and Related Products (by Country / Region), 2013
- Export Volume and Export Value of NdFeB and Related Products, 2013
- NdFeB Permanent Magnet Export Volume Structure (by Country / Region), 2013
- NdFeB Magnetic powder Export Volume Structure (by Country / Region), 2013

- Export Volume Structure of Other Neodymium-Iron Alloy (by Country / Region), 2013
- Capacity Structure of NdFeB Production Enterprises, 2014
- Capacity of Major Chinese NdFeB Manufacturers, 2014
- China's Metal Neodymium Price, 2013-2014
- China's Metal Praseodymium Price, 2013-2014
- China's New Energy Vehicle Output, 2011-2014
- Performance Comparison between Permanent Magnet Motors and Other Motors
- Mainstream Global New Energy Vehicle Driving Motors, 2013
- NdFeB Demand Generated by New Energy Vehicles in China, 2009-2014
- China's Wind Power Installed Capacity, 2006-2014
- NdFeB Demand Generated by Wind Power Equipment in China, 2008-2014
- NdFeB Demand Generated by Inverter air conditioners in China, 2011-2017E
- Global Business Layout of Hitachi Metals
- Revenue and Net Income of Hitachi Metals, FY2010-FY2014
- Revenue Structure of Hitachi Metals (by Product), FY2014
- Global Market Expansion Strategy of Hitachi Metals, 2015E
- Magnetic Material Revenue of Hitachi Metals, FY2012-FY2014
- NdFeB Production Bases of Hitachi Metals, FY2014
- Distribution of Enterprises of Hitachi Metals in China, 2014
- Revenue and Net Income of Shin-Etsu Chemical, FY2004-FY2014
- Revenue Structure of Shin-Etsu Chemical (by Business), FY2014
- Revenue Structure of Shin-Etsu Chemical (by Region), FY2014
- Distribution of NdFeB Production Bases of Shin-Etsu Chemical
- TDK's Global Marketing Network
- TDK's Revenue and Net Income, FY2010-FY2015



- TDK's Revenue Structure (by Product), FY2013-FY2014
- TDK's Revenue Structure (by Region), FY2010-FY2014
- TDK's Main Magnetic Products
- Global Marketing Network of Seiko Epson
- VAC's Operating Revenue Structure (by Product), 2014
- Revenue and Net Income of Zhong Ke San Huan, 2009-2014
- Operating Revenue of Zhong Ke San Huan (by Product), 2008-2013
- Revenue Structure of Zhong Ke San Huan (by Region), 2008/2013
- Revenue of NdFeB Subsidiaries of Zhong Ke San Huan, 2013
- NdFeB Revenue and Growth Rate of Zhong Ke San Huan, 2003-2013
- Main NdFeB Application Fields of Zhong Ke San Huan, 2013
- Revenue and Net Income of Zhenghai Magnetic Material, 2009-2014
- Revenue Structure of Zhenghai Magnetic Material (by Region), 2010-2013
- NdFeB Revenue and Gross Margin of Zhenghai Magnetic Material, 2010-2014
- NdFeB Output and Sales Volume of Zhenghai Magnetic Material, 2012-2013
- NdFeB Revenue Structure of Zhenghai Magnetic Material (by Type), 2014
- NdFeB Consumption Structure of Zhenghai Magnetic Material, 2013
- R & D Investment of Zhenghai Magnetic Material, 2011-2013
- Number of Employees of Ningbo Yunsheng, 2007-2013
- Revenue and Net Income of Ningbo Yunsheng, 2008-2014
- Revenue Structure of Ningbo Yunsheng (by Product), 2012-2014
- Revenue Structure of Ningbo Yunsheng (by Region), 2010-2014
- NdFeB Revenue and Gross Margin of Ningbo Yunsheng, 2009-2014
- NdFeB Product Cost Structure of Ningbo Yunsheng, 2012-2013
- NdFeB Product Consumption Structure of Ningbo Yunsheng, 2013
- Revenue of Major NdFeB Subsidiaries of Ningbo Yunsheng, 2014

- Revenue and Net Income of AT & M, 2009-2014
- Revenue Structure of AT & M (by Product), 2013-2014
- Revenue of AT & M (by Region), 2010-2014
- Main Economic Indicators of Shenzhen Highmag Magnet, 2013-2014
- Number of Employees of Baotou Steel Rare-earth, 2009-2013
- Revenue and Net Income of Baotou Steel Rare-earth, 2008-2014
- Eliminated Subsidiaries of Baotou Steel Rare-earth, 2014
- Revenue Structure of Baotou Steel Rare-earth (by Product), 2012-2013
- Revenue Structure of Baotou Steel Rare-earth (by Region), 2008-2014
- Gross Margin of Baotou Steel Rare-earth (by Product), 2008-2014
- NdFeB Revenue and Gross Margin of Baotou Steel Rare-earth, 2008-2014
- Main Economic Indicators of Baotou Steel Rare-earth, 2012-2014
- Equity Structure of Xiamen Tungsten
- Revenue and Net Income of Xiamen Tungsten, 2008-2014
- Revenue Structure of Xiamen Tungsten (by Product), 2012-2013
- Revenue Structure of Xiamen Tungsten (by Region), 2009-2013
- Main Economic Indicators of Changting Golden Dragon Rare Earth Co., Ltd., 2010-2013
- Number of Employees of Taiyuan Twin Tower Aluminum Oxide, 2008-2013
- Revenue and Net Income of Taiyuan Twin Tower Aluminum Oxide, 2008-2014
- Revenue Structure of Taiyuan Twin Tower Aluminum Oxide (by Product), 2013-2014
- Revenue Structure of Taiyuan Twin Tower Aluminum Oxide (by Region), 2008-2014
- Gross Margin of Taiyuan Twin Tower Aluminum Oxide (by Product), 2008-2014
- NdFeB Cost Structure of Taiyuan Twin Tower Aluminum Oxide, 2013
- NdFeB Revenue and Growth Rate of Taiyuan Twin Tower Aluminum Oxide, 2008-2014
- Main Economic Indicators of Zhejiang Innuovo Magnetics, 2012-2014
- Main Economic Indicators of Shanxi Innuovo Magnetics, 2012-2013

- Revenue and Net Income of Sinosteel Anhui Tianyuan Technology, 2008-2014
- Revenue Structure of Sinosteel Anhui Tianyuan Technology (by Product), 2013-2014
- Revenue Structure of Sinosteel Anhui Tianyuan Technology (by Region), 2009-2014
- Number of Employees of Rising Nonferrous Metals, 2009-2013
- Sales of Rising Nonferrous Metals from Major Customers, 2012-2013
- Revenue and Net Income of Rising Nonferrous Metals, 2009-2014
- Revenue Structure of Rising Nonferrous Metals (by Product), 2013-2014
- Revenue Structure of Rising Nonferrous Metals (by Region), 2013-2014
- Gross Margin of Rising Nonferrous Metals (by Product), 2009-2014
- Main Economic Indicators of Guangdong Guangsheng Nonferrous Metals Imp. & Exp. Co., Ltd., 2012-2014
- Main Economic Indicators of Guangsheng Zhiwei Rare Earth New Materials Co., Ltd., 2012-2014
- Number of Employees of Broad-Ocean Motor, 2009-2013
- Revenue and Net Income of Broad-Ocean Motor, 2009-2014
- Revenue Structure of Broad-Ocean Motor (by Product), 2013-2014
- Revenue Structure of Broad-Ocean Motor (by Region), 2009-2014
- Gross Margin of Broad-Ocean Motor (by Product), 2009-2014
- Main Economic Indicators of Ningbo Co-star Material Technology Co., Ltd., 2012-2014
- Revenue and Net Income of Galaxy Magnets, 2008-2014
- Revenue Structure of Galaxy Magnets (by Product), 2012-2013
- Revenue Structure of Galaxy Magnets (by Region), 2011-2014
- NdFeB Revenue and Growth Rate of Galaxy Magnets, 2009-2014
- NdFeB Revenue Structure of Galaxy Magnets (by Product), 2013-2014
- Main R & D Projects of Galaxy Magnets, 2014
- Global and Chinese NdFeB Output Growth Rate, 2009-2018E
- Global and Chinese High-performance NdFeB Output Growth Rate, 2009-2014
- Revenue Growth Rate of Major Global NdFeB Manufacturers, 2009-2014

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