

# **Global and China Rare Earth Permanent Magnet Industry Report, 2017-2021**

**May 2018**

## 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

Rare earth permanent magnetic materials are divided into SmCo permanent magnet and NdFeB permanent magnet. NdFeB, the third-generation raw earth permanent magnetic material, has the strongest magnetic property and finds the widest application, holding over 90% market share.

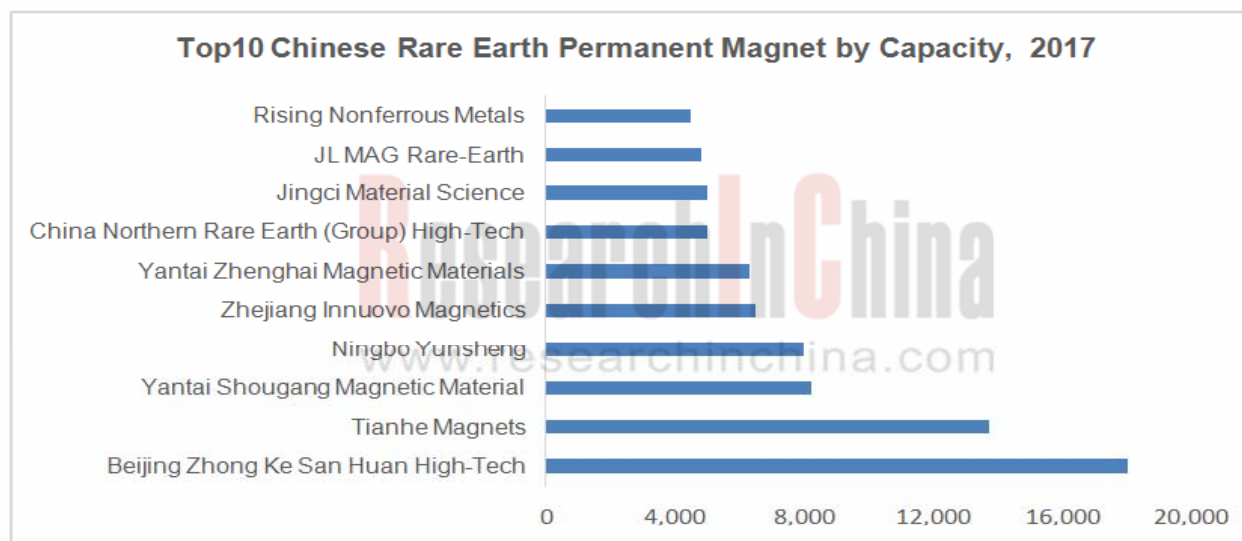
Global NdFeB permanent magnet market has grown by leaps and bounds in recent years with the output for 2017 exceeding 170kt, a 78.5% upsurge over 2010, including more than 60kt of high-performance NdFeB, soaring 135.1% from 2010, well above the average growth rate of the industry. Globally, only TDK, Hitachi Metals, Shin-Etsu Chemical and VAC are capable of producing high-performance NdFeB permanent magnet, seizing almost 50% of the world market.

China has been the world's largest producer of rare earth permanent magnet by virtue of its rare earth resource superiority. More than 150kt of NdFeB permanent magnet or about 90% of the global total was produced in China in 2017. Despite the country's massive production capacity, most of Chinese NdFeB enterprises still focus on mid and low-end products and have not yet been strong in high-end products. For that reason, the country has issued favorable policies such as the Guidance for the Development of New Materials Industry to facilitate the development of high-performance NdFeB. Meanwhile, emerging fields like new energy vehicle, robot and energy-saving household appliances also give an impetus to high-performance NdFeB. It is expected the country's demand for high-performance NdFeB will rise by more than 15% during 2018-2021.

Thanks to supportive policies and rising demand from downstream sectors, Chinese enterprises like Beijing Zhong Ke San Huan High-Tech, Ningbo Yunsheng and Yantai Zhenghai Magnetic Material have increased investment in and sped up production of high-performance NdFeB over the recent years. Take Beijing Zhong Ke San Huan High-Tech for example, it set up a joint venture with Hitachi Metals (holding 51% stake) in Nantong city, Jiangsu province in June 2015 to produce high-performance NdFeB for new energy vehicle (NEV). The Phase-I 2kt Project went into production in 2017, bringing annual capacity up to 18kt, still No. 1 in the Chinese market.

China Rare Earth Permanent Magnet Industry Report, 2017-2021 highlights the followings:

- ◆ Global rare earth permanent magnetic materials market (production, consumption, patents, competition among enterprises);
- ◆ Chinese raw earth permanent magnet market (production, consumption, import & export, enterprise/regional/product competition, price trend, status quo of technologies);
- ◆ Rare earth reserves, market supply & demand, price trend, downstream markets (automobile/new energy vehicle, wind power equipment, inverter air-conditioners, energy-saving elevators, robots and consumer electronics) and demand for rare earth permanent magnetic materials;
- ◆ Four global and twenty-two Chinese producers (raw earth permanent magnetic materials business, development strategy, forecasts, etc.).



Source: China Rare Earth Permanent Magnet Industry Report, 2017-2021

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