



**Global and China NdFeB Industry Report,  
2018-2023**

**December 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

Featured with strong magnetic energy product and high compacted density, NdFeB is widely used in various fields. The NdFeB industry over the recent years has characterized the following:

First, the NdFeB market has grown steadily. In 2017, global NdFeB output was about 154,000 tons, with a CAGR of 6.9% between 2010 and 2017. With the growing demand for high magnetic strength and equipment miniaturization in existing and emerging applications, global NdFeB output will be approximately 250,000 tons in 2023.

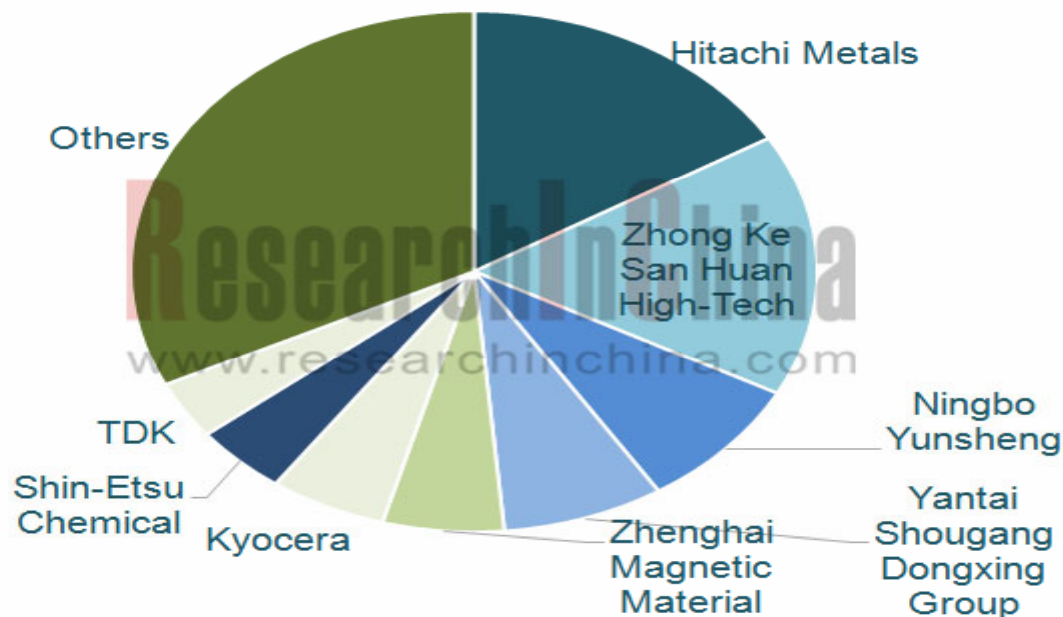
As the world's largest producer of NdFeB, China produced 138,000 tons of NdFeB with a year-on-year increase of 6.2%, equivalent to over 85% of the global total in 2017; in 2023, the output in China will exceed 200,000 tons.

Second, the high-performance NdFeB market has been growing faster than the NdFeB market. In 2017, the world's output of high-performance NdFeB jumped 7.7% year on year to 53,000 tons, of which 32,000 tons or 61.1% stemmed from China with the output AAGR of over 20% during 2010-2017. It is expected that China's NdFeB output will grow at an annual rate of at least 10% from 2018 to 2023 under the impetus of robust market demand.

Third, the prices of raw materials have hiked. Being subject to inspection of Ministry of Industry and Information Technology of the People's Republic of China (MIIT) and the state reserve policy, the prices of metallic praseodymium and neodymium soared more than 40% apiece in 2017. In 2018, the price of metallic neodymium dropped a bit, while that of metallic praseodymium ran steadily.

Fourth, new product markets have been explored constantly. In addition to use in energy-efficient elevators, consumer electronics, automotive EPS, and energy-efficient air conditioners, NdFeB has found application in high-end fields such as new energy vehicles, industrial robots, and rail transit over the recent years. In 2018, new energy vehicle is the largest applied field of NdFeB in China, consuming at least 20% of NdFeB. The demand from new energy vehicles may make up around 30.0% in 2023.

## Competitive Landscape of Global High-performance NdFeB Market, 2018



Source: Global and China NdFeB Industry Report, 2018-2023 by ResearchInChina

Last, the industrial concentration still remains low. Global NdFeB manufacturers are largely from China and Japan, including Japan-based Hitachi Metals, Shin-Etsu Chemical, TDK, etc., and China-based Zhong Ke San Huan High-Tech, China Northern Rare Earth (Group) High-Tech, Ningbo Yunsheng, Zhenghai Magnetic Material, among others. In 2018, the world's top five NdFeB producers hold a combined less than 20% share of the market.

Although the global NdFeB market is less concentrated, the high-performance NdFeB market has a fairly high concentration degree because of high barriers. In 2018, the world's top five high-performance NdFeB manufacturers swept 54.3% shares together. Among them, Hitachi Metals and Zhong Ke San Huan High-Tech, each of which enjoyed 16.4% market share, ranked first in the industry.

Global and China NdFeB Industry Report, 2018-2023 focuses on the followings:

- ◆ Definition, product classification, industry chain of NdFeB, etc.;
- ◆ Global NdFeB industry (development environment, market size/structure, patents, competitive landscape, etc.);
- ◆ NdFeB industry in China (industrial policies, market size/structure, cost structure, patents, competitive landscape, etc.);
- ◆ The price trend of NdFeB upstream raw materials, status quo of NdFeB downstream industries (automotive, wind power, air conditioning, consumer electronics, industrial robots, etc.), NdFeB demand, etc.;
- ◆ Operation, NdFeB business, etc. of 5 foreign and 16 Chinese NdFeB manufacturers.

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- 1.1 Definition
- 1.2 Product Category
- 1.3 Industry Chain

**2 Status Quo of Global NdFeB Market**

- 2.1 Development Environment
- 2.2 Market Size
- 2.3 Market Structure
- 2.4 Patent
- 2.5 Competitive Landscape

**3 Status Quo of Chinese NdFeB Market**

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