



**Global and China Rare Earth Permanent
Magnet Industry Report, 2018-2023**

Mar. 2019

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.

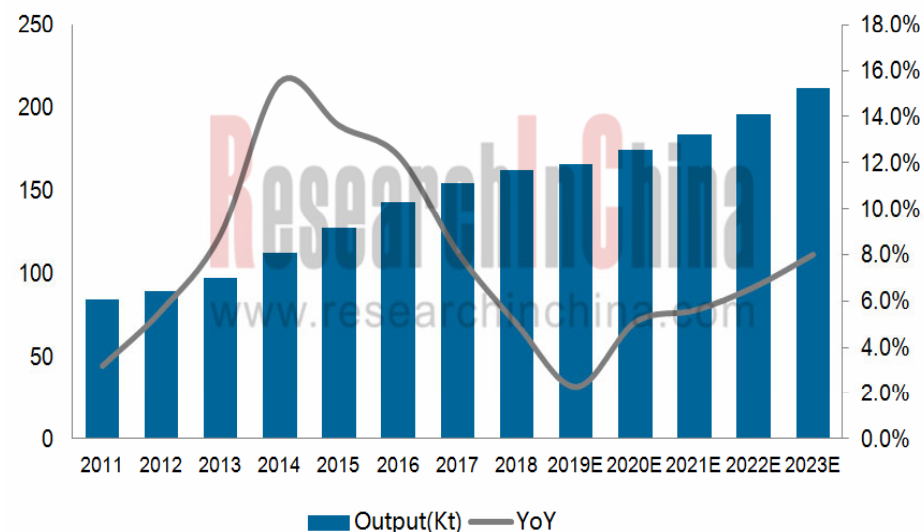
Abstract

Rare earth permanent magnets consist of SmCo permanent magnet and NdFeB permanent magnet among which NdFeB as a kind of 3rd-Gen rare earth permanent magnetic material takes a lion's share of the market due to its excellent magnetic energy product. NdFeB falls into bonded NdFeB, sintered NdFeB and hot-pressed NdFeB, where sintered NdFeB plays a key role while hot-pressed NdFeB is rarely produced and its industry has not taken shape yet.

As is shown from the latest data, China produced 164.5 kt of rare earth permanent magnets in 2018, edging up 4.6% on an annualized basis. Elaborately, the output of NdFeB permanent magnets posted 162 kt with a year-on-year increase of 5.0%; and that of SmCo permanent magnets stood at 2.5 kt and remained a par with the figure in 2017. It is expected that the rare earth permanent magnet market is beyond optimism and keep a growth rate of down to 2% or so in 2019.

China is the world's largest both producer and exporter of rare earth permanent magnets. In 2018, it occupied 90.5% of the global total output and exported roughly 39kt worth \$1.87 billion, higher volume and value than those in the previous year. The permanent magnets of rare earth metals and permanent magnets of other metals and articles intended to become permanent magnets after magnetization (HS: 85051110) account for the bulk of the exports and enjoy an export tax rebate rate of 16% (according to the latest policy released in November 2018), with 32.7kt in volume or \$1.69 billion in value exported in 2018.

China's NdFeB Output and YoY Change, 2011-2023



Source: Global and China Rare Earth Permanent Magnet Industry Report, 2018-2023 by ResearchInChina

In recent years, China has taken rare earth, the upstream of rare earth permanent magnet materials industry, as a resource of strategic importance and restricted the total mining and smelting volume. In 2018 the country revised up the indexes for the first time since 2014, increasing the mining volume from 105kt to 120kt and smelting and separation volume from 100kt to 115kt. The Special Administrative Measures for the Access of Foreign Investment (Negative List) (2018) issued in June 2018 first indicates that the limit to co-funded or cooperative smelting and separation of rare earth will be lifted.

Rare earth permanent magnets find wide application in downstream sectors, and it not only gets mostly utilized in industrial motors but is increasingly used in new energy vehicle, wind power, industrial robot, among others. In 2018, new energy vehicle, energy-efficient household appliances, electric tools, industrial robots and so forth give impetus to the industrial development of rare earth permanent magnets whose quality gets incessantly improved and output sees steady growth. The key players maintain a sound development momentum and such advanced technologies as grain-boundary diffusion are promoted further. There emerge new applied fields like the traction motor for high-speed railway.

Nowadays, local Chinese enterprises lead the competition, such as Beijing Zhong Ke San Huan Hi-Tech, Tianhe Magnets, Ningbo Yunsheng, JL MAG Rare-Earth, Yantai Shougang Magnetic Material Inc., Zhejiang Innuovo Magnetics, and Yantai Zhenghai Magnetic Materials, and they provides products of medium and high quality. In 2018, the production capacity of Zhong Ke San Huan Hi-Tech, Tianhe Magnets, Tianhe Magnets, and Ningbo Yunsheng was in excess of 10,000 tons apiece. Additionally, the foreign giants like TDK, Hitachi Metals, VAC, and Shin-Etsu Chemical have forayed into China and have been striving for larger market share there. In 2018, the NdFeB price dropped from an early high, causing a fall in manufacturers' net income.

The report highlights the following:

Global production and consumption of rare earth permanent magnets, competition between the players, the status quo of patents;

China's production, consumption and import & export of rare earth permanent magnets, competition between enterprises, competition by region and product, price trend, status quo of technologies, etc.;

Upstream rare earth reserves, market demand and supply, price tendency as well as the status quo of downstream markets (automobile/NEV, wind power equipment, inverter air-conditioner, energy-saving elevator, robotics, consumer electronics, etc.) and their demand for rare earth permanent magnets;

Five foreign and twenty-three Chinese manufacturers (operation, rare earth permanent magnet business, development strategy, future forecasts, etc.)

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