

# Global Iron-based Soft Magnetic Materials Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Iron-based Soft Magnetic Materials competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Iron-based soft magnetic materials are materials primarily composed of iron or its alloys, known for their excellent magnetic properties, such as high magnetic permeability, low coercivity, and low energy loss. These materials are widely used in applications that require efficient magnetic energy transfer, such as transformers, motors, inductors, and electromagnetic shielding. In 2024, global Iron-based Soft Magnetic Materials production reached approximately 420.6 K tons, with an average global market price of around US\$ 1502.4 per ton. Iron-based Soft Magnetic Materials are a category of functional magnetic materials with iron as the core component, including iron-silicon alloys (silicon steel), iron-aluminum alloys, soft ferrite, and iron-based amorphous/nanocrystalline alloys. They feature low coercivity ( $<1000\text{A/m}$ ), high magnetic permeability, and low magnetic loss, enabling rapid magnetization and demagnetization under external magnetic fields. Manufactured through processes like smelting, rolling, annealing, or powder metallurgy, they are critical for converting and transmitting electromagnetic energy, widely used in electronic transformers, inductors, motors, and power supply components across automotive, energy, and consumer electronics sectors. The single-line production capacity of Iron-based Soft Magnetic Materials is 13.4 to 13.8 K tons per year, the average gross profit margin was 21.2%. The cost structure of Iron-based Soft Magnetic Materials is dominated by four core components with clear weights: raw material costs account for the largest share at 55%-65%, mainly including iron ore, silicon ore, alloying elements (aluminum, cobalt), and iron-based intermediates, where fluctuations in iron and non-ferrous metal prices directly drive overall cost volatility. Production and processing costs make up 20%-25%,

covering smelting, rolling, heat treatment (annealing), and precision processing?strict control over grain structure (for low loss) and dimensional accuracy increases manufacturing complexity. R&D costs represent 8%-12%, dedicated to optimizing alloy formulas (enhancing magnetic permeability), improving process efficiency, and developing low-loss amorphous/nanocrystalline variants, as performance upgrades are key to market competition. Packaging and logistics costs constitute the remaining 4%-6%, including moisture-proof packaging (to prevent oxidation) and bulk transportation, with storage requiring dry conditions to maintain magnetic properties. The industry chain of Iron-based Soft Magnetic Materials consists of three interconnected tiers: upstream includes suppliers of iron ore, silicon ore, alloying elements, and production equipment (smelting furnaces, rolling mills, annealing machines), as well as providers of chemical reagents and testing instruments. Midstream involves enterprises engaged in raw material smelting, alloy blending, processing (rolling/powder metallurgy), heat treatment, and quality inspection, focusing on adjusting alloy compositions and process parameters to meet the magnetic performance requirements of different downstream products. Downstream covers manufacturers of power electronic components (transformers, inductors), new energy vehicles (drive motors), home appliances, photovoltaic inverters, and communication equipment, with demand driven by the production of energy-saving and high-efficiency electromagnetic devices. Demand for Iron-based Soft Magnetic Materials is growing rapidly driven by global "dual carbon" policies, the expansion of new energy industries (new energy vehicles, photovoltaics), and the upgrading of consumer electronics and power grids. It addresses pain points such as high energy loss of traditional magnetic materials, while the popularity of high-frequency and high-efficiency electromagnetic devices further boosts demand for high-performance variants (e.g., iron-based nanocrystalline alloys). Key business opportunities lie in developing low-loss amorphous/nanocrystalline materials for new energy vehicle motors and photovoltaic inverters, optimizing silicon steel production processes to reduce costs, and expanding into emerging markets with growing electrical equipment manufacturing (e.g., Southeast Asia, Latin America). Additionally, leveraging policy support for energy-saving materials and collaborating with downstream device manufacturers for customized solutions can further tap into the high-growth potential of the magnetic materials market.

The global Iron-based Soft Magnetic Materials market size was estimated at USD 633.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 12.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Iron-based Soft Magnetic Materials market, covering all critical facets from a broad macroeconomic

overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Iron-based Soft Magnetic Materials market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Iron-based Soft Magnetic Materials market.

### **Global Iron-based Soft Magnetic Materials Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Sandvik  
Proterial  
Amogreentech

Micrometals  
Epson Atmix  
Dongbu Electronic Materials  
Nopion  
Samwha Electronics  
DOWA Electronics Materials  
Daido Steel  
Hoganas  
Nippon Steel  
JFE Steel  
thyssenkrupp Steel  
ArcelorMittal  
voestalpine  
POCO Magnetic  
CSC (Changsung Corp.)  
MAGNETICS  
Nanjing New Conda Magnetic  
Advanced Technology & Materials  
Qingdao Yunlu Advanced Materials  
Jiangxi Yuean Advanced Materials  
ZheJiang NBTM KeDa (KDM)  
Hunan Hualiu New Materials  
Yahao Materials & Technology

### **Market Segmentation (by Type)**

Pure Iron  
Silicon Steel  
Iron?Nickel Alloys  
Iron?Cobalt Alloys  
Iron-Based Amorphous Alloys  
Iron-Based Nanocrystalline Alloys

### **Market Segmentation (by Application)**

Power Electronics  
Automotive  
Industrial Automation  
Consumer Electronics

Renewable Energy Systems  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Iron-based Soft Magnetic Materials Market

Overview of the regional outlook of the Iron-based Soft Magnetic Materials Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Iron-based Soft Magnetic Materials Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Iron-based Soft Magnetic Materials, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as

challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of Iron-based Soft Magnetic Materials
- 1.2 Key Market Segments
  - 1.2.1 Iron-based Soft Magnetic Materials Segment by Type
  - 1.2.2 Iron-based Soft Magnetic Materials Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 IRON-BASED SOFT MAGNETIC MATERIALS MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global Iron-based Soft Magnetic Materials Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global Iron-based Soft Magnetic Materials Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 IRON-BASED SOFT MAGNETIC MATERIALS MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global Iron-based Soft Magnetic Materials Product Life Cycle
- 3.3 Global Iron-based Soft Magnetic Materials Sales by Manufacturers (2020-2025)
- 3.4 Global Iron-based Soft Magnetic Materials Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Iron-based Soft Magnetic Materials Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Iron-based Soft Magnetic Materials Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Iron-based Soft Magnetic Materials Market Competitive Situation and Trends

- 3.8.1 Iron-based Soft Magnetic Materials Market Concentration Rate
- 3.8.2 Global 5 and 10 Largest Iron-based Soft Magnetic Materials Players Market Share by Revenue
- 3.8.3 Mergers & Acquisitions, Expansion

## **4 IRON-BASED SOFT MAGNETIC MATERIALS INDUSTRY CHAIN ANALYSIS**

- 4.1 Iron-based Soft Magnetic Materials Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF IRON-BASED SOFT MAGNETIC MATERIALS MARKET**

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
  - 5.4.1 New Product Developments
  - 5.4.2 Mergers & Acquisitions
  - 5.4.3 Expansions
  - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
  - 5.5.1 Industry Policies Analysis
  - 5.5.2 Economic Environment Analysis
  - 5.5.3 Social Environment Analysis
  - 5.5.4 Technological Environment Analysis
- 5.6 Global Iron-based Soft Magnetic Materials Market Porter's Five Forces Analysis
  - 5.6.1 Global Trade Frictions
  - 5.6.2 U.S. Tariff Policy ? April 2025
  - 5.6.3 Global Trade Frictions and Their Impacts to Iron-based Soft Magnetic Materials Market
- 5.7 ESG Ratings of Leading Companies

## **6 IRON-BASED SOFT MAGNETIC MATERIALS MARKET SEGMENTATION BY TYPE**

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)

- 6.2 Global Iron-based Soft Magnetic Materials Sales Market Share by Type (2020-2025)
- 6.3 Global Iron-based Soft Magnetic Materials Market Size by Type (2020-2025)
- 6.4 Global Iron-based Soft Magnetic Materials Price by Type (2020-2025)

## **7 IRON-BASED SOFT MAGNETIC MATERIALS MARKET SEGMENTATION BY APPLICATION**

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Iron-based Soft Magnetic Materials Market Sales by Application (2020-2025)
- 7.3 Global Iron-based Soft Magnetic Materials Market Size (M USD) by Application (2020-2025)
- 7.4 Global Iron-based Soft Magnetic Materials Sales Growth Rate by Application (2020-2025)

## **8 IRON-BASED SOFT MAGNETIC MATERIALS MARKET SALES BY REGION**

- 8.1 Global Iron-based Soft Magnetic Materials Sales by Region
  - 8.1.1 Global Iron-based Soft Magnetic Materials Sales by Region
  - 8.1.2 Global Iron-based Soft Magnetic Materials Sales Market Share by Region
- 8.2 Global Iron-based Soft Magnetic Materials Market Size by Region
  - 8.2.1 Global Iron-based Soft Magnetic Materials Market Size by Region
  - 8.2.2 Global Iron-based Soft Magnetic Materials Market Size by Region
- 8.3 North America
  - 8.3.1 North America Iron-based Soft Magnetic Materials Sales by Country
  - 8.3.2 North America Iron-based Soft Magnetic Materials Market Size by Country
  - 8.3.3 U.S. Market Overview
  - 8.3.4 Canada Market Overview
  - 8.3.5 Mexico Market Overview
- 8.4 Europe
  - 8.4.1 Europe Iron-based Soft Magnetic Materials Sales by Country
  - 8.4.2 Europe Iron-based Soft Magnetic Materials Market Size by Country
  - 8.4.3 Germany Market Overview
  - 8.4.4 France Market Overview
  - 8.4.5 U.K. Market Overview
  - 8.4.6 Italy Market Overview
  - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
  - 8.5.1 Asia Pacific Iron-based Soft Magnetic Materials Sales by Region
  - 8.5.2 Asia Pacific Iron-based Soft Magnetic Materials Market Size by Region

- 8.5.3 China Market Overview
- 8.5.4 Japan Market Overview
- 8.5.5 South Korea Market Overview
- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
  - 8.6.1 South America Iron-based Soft Magnetic Materials Sales by Country
  - 8.6.2 South America Iron-based Soft Magnetic Materials Market Size by Country
  - 8.6.3 Brazil Market Overview
  - 8.6.4 Argentina Market Overview
  - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
  - 8.7.1 Middle East and Africa Iron-based Soft Magnetic Materials Sales by Region
  - 8.7.2 Middle East and Africa Iron-based Soft Magnetic Materials Market Size by Region
  - 8.7.3 Saudi Arabia Market Overview
  - 8.7.4 UAE Market Overview
  - 8.7.5 Egypt Market Overview
  - 8.7.6 Nigeria Market Overview
  - 8.7.7 South Africa Market Overview

## **9 IRON-BASED SOFT MAGNETIC MATERIALS MARKET PRODUCTION BY REGION**

- 9.1 Global Production of Iron-based Soft Magnetic Materials by Region(2020-2025)
- 9.2 Global Iron-based Soft Magnetic Materials Revenue Market Share by Region (2020-2025)
- 9.3 Global Iron-based Soft Magnetic Materials Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Iron-based Soft Magnetic Materials Production
  - 9.4.1 North America Iron-based Soft Magnetic Materials Production Growth Rate (2020-2025)
  - 9.4.2 North America Iron-based Soft Magnetic Materials Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Iron-based Soft Magnetic Materials Production
  - 9.5.1 Europe Iron-based Soft Magnetic Materials Production Growth Rate (2020-2025)
  - 9.5.2 Europe Iron-based Soft Magnetic Materials Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Iron-based Soft Magnetic Materials Production (2020-2025)

- 9.6.1 Japan Iron-based Soft Magnetic Materials Production Growth Rate (2020-2025)
- 9.6.2 Japan Iron-based Soft Magnetic Materials Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Iron-based Soft Magnetic Materials Production (2020-2025)
  - 9.7.1 China Iron-based Soft Magnetic Materials Production Growth Rate (2020-2025)
  - 9.7.2 China Iron-based Soft Magnetic Materials Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

### 10.1 Sandvik

- 10.1.1 Sandvik Basic Information
- 10.1.2 Sandvik Iron-based Soft Magnetic Materials Product Overview
- 10.1.3 Sandvik Iron-based Soft Magnetic Materials Product Market Performance
- 10.1.4 Sandvik Business Overview
- 10.1.5 Sandvik SWOT Analysis
- 10.1.6 Sandvik Recent Developments

### 10.2 Proterial

- 10.2.1 Proterial Basic Information
- 10.2.2 Proterial Iron-based Soft Magnetic Materials Product Overview
- 10.2.3 Proterial Iron-based Soft Magnetic Materials Product Market Performance
- 10.2.4 Proterial Business Overview
- 10.2.5 Proterial SWOT Analysis
- 10.2.6 Proterial Recent Developments

### 10.3 Amogreentech

- 10.3.1 Amogreentech Basic Information
- 10.3.2 Amogreentech Iron-based Soft Magnetic Materials Product Overview
- 10.3.3 Amogreentech Iron-based Soft Magnetic Materials Product Market Performance
- 10.3.4 Amogreentech Business Overview
- 10.3.5 Amogreentech SWOT Analysis
- 10.3.6 Amogreentech Recent Developments

### 10.4 Micrometals

- 10.4.1 Micrometals Basic Information
- 10.4.2 Micrometals Iron-based Soft Magnetic Materials Product Overview
- 10.4.3 Micrometals Iron-based Soft Magnetic Materials Product Market Performance
- 10.4.4 Micrometals Business Overview
- 10.4.5 Micrometals Recent Developments

### 10.5 Epson Atmix

- 10.5.1 Epson Atmix Basic Information

- 10.5.2 Epson Atmix Iron-based Soft Magnetic Materials Product Overview
- 10.5.3 Epson Atmix Iron-based Soft Magnetic Materials Product Market Performance
- 10.5.4 Epson Atmix Business Overview
- 10.5.5 Epson Atmix Recent Developments
- 10.6 Dongbu Electronic Materials
  - 10.6.1 Dongbu Electronic Materials Basic Information
  - 10.6.2 Dongbu Electronic Materials Iron-based Soft Magnetic Materials Product Overview
  - 10.6.3 Dongbu Electronic Materials Iron-based Soft Magnetic Materials Product Market Performance
  - 10.6.4 Dongbu Electronic Materials Business Overview
  - 10.6.5 Dongbu Electronic Materials Recent Developments
- 10.7 Nopion
  - 10.7.1 Nopion Basic Information
  - 10.7.2 Nopion Iron-based Soft Magnetic Materials Product Overview
  - 10.7.3 Nopion Iron-based Soft Magnetic Materials Product Market Performance
  - 10.7.4 Nopion Business Overview
  - 10.7.5 Nopion Recent Developments
- 10.8 Samwha Electronics
  - 10.8.1 Samwha Electronics Basic Information
  - 10.8.2 Samwha Electronics Iron-based Soft Magnetic Materials Product Overview
  - 10.8.3 Samwha Electronics Iron-based Soft Magnetic Materials Product Market Performance
  - 10.8.4 Samwha Electronics Business Overview
  - 10.8.5 Samwha Electronics Recent Developments
- 10.9 DOWA Electronics Materials
  - 10.9.1 DOWA Electronics Materials Basic Information
  - 10.9.2 DOWA Electronics Materials Iron-based Soft Magnetic Materials Product Overview
  - 10.9.3 DOWA Electronics Materials Iron-based Soft Magnetic Materials Product Market Performance
  - 10.9.4 DOWA Electronics Materials Business Overview
  - 10.9.5 DOWA Electronics Materials Recent Developments
- 10.10 Daido Steel
  - 10.10.1 Daido Steel Basic Information
  - 10.10.2 Daido Steel Iron-based Soft Magnetic Materials Product Overview
  - 10.10.3 Daido Steel Iron-based Soft Magnetic Materials Product Market Performance
  - 10.10.4 Daido Steel Business Overview
  - 10.10.5 Daido Steel Recent Developments

## 10.11 Hoganas

10.11.1 Hoganas Basic Information

10.11.2 Hoganas Iron-based Soft Magnetic Materials Product Overview

10.11.3 Hoganas Iron-based Soft Magnetic Materials Product Market Performance

10.11.4 Hoganas Business Overview

10.11.5 Hoganas Recent Developments

## 10.12 Nippon Steel

10.12.1 Nippon Steel Basic Information

10.12.2 Nippon Steel Iron-based Soft Magnetic Materials Product Overview

10.12.3 Nippon Steel Iron-based Soft Magnetic Materials Product Market Performance

10.12.4 Nippon Steel Business Overview

10.12.5 Nippon Steel Recent Developments

## 10.13 JFE Steel

10.13.1 JFE Steel Basic Information

10.13.2 JFE Steel Iron-based Soft Magnetic Materials Product Overview

10.13.3 JFE Steel Iron-based Soft Magnetic Materials Product Market Performance

10.13.4 JFE Steel Business Overview

10.13.5 JFE Steel Recent Developments

## 10.14 thyssenkrupp Steel

10.14.1 thyssenkrupp Steel Basic Information

10.14.2 thyssenkrupp Steel Iron-based Soft Magnetic Materials Product Overview

10.14.3 thyssenkrupp Steel Iron-based Soft Magnetic Materials Product Market

Performance

10.14.4 thyssenkrupp Steel Business Overview

10.14.5 thyssenkrupp Steel Recent Developments

## 10.15 ArcelorMittal

10.15.1 ArcelorMittal Basic Information

10.15.2 ArcelorMittal Iron-based Soft Magnetic Materials Product Overview

10.15.3 ArcelorMittal Iron-based Soft Magnetic Materials Product Market Performance

10.15.4 ArcelorMittal Business Overview

10.15.5 ArcelorMittal Recent Developments

## 10.16 voestalpine

10.16.1 voestalpine Basic Information

10.16.2 voestalpine Iron-based Soft Magnetic Materials Product Overview

10.16.3 voestalpine Iron-based Soft Magnetic Materials Product Market Performance

10.16.4 voestalpine Business Overview

10.16.5 voestalpine Recent Developments

## 10.17 POCO Magnetic

10.17.1 POCO Magnetic Basic Information

- 10.17.2 POCO Magnetic Iron-based Soft Magnetic Materials Product Overview
- 10.17.3 POCO Magnetic Iron-based Soft Magnetic Materials Product Market Performance
- 10.17.4 POCO Magnetic Business Overview
- 10.17.5 POCO Magnetic Recent Developments
- 10.18 CSC (Changsung Corp.)
  - 10.18.1 CSC (Changsung Corp.) Basic Information
  - 10.18.2 CSC (Changsung Corp.) Iron-based Soft Magnetic Materials Product Overview
  - 10.18.3 CSC (Changsung Corp.) Iron-based Soft Magnetic Materials Product Market Performance
  - 10.18.4 CSC (Changsung Corp.) Business Overview
  - 10.18.5 CSC (Changsung Corp.) Recent Developments
- 10.19 MAGNETICS
  - 10.19.1 MAGNETICS Basic Information
  - 10.19.2 MAGNETICS Iron-based Soft Magnetic Materials Product Overview
  - 10.19.3 MAGNETICS Iron-based Soft Magnetic Materials Product Market Performance
  - 10.19.4 MAGNETICS Business Overview
  - 10.19.5 MAGNETICS Recent Developments
- 10.20 Nanjing New Conda Magnetic
  - 10.20.1 Nanjing New Conda Magnetic Basic Information
  - 10.20.2 Nanjing New Conda Magnetic Iron-based Soft Magnetic Materials Product Overview
  - 10.20.3 Nanjing New Conda Magnetic Iron-based Soft Magnetic Materials Product Market Performance
  - 10.20.4 Nanjing New Conda Magnetic Business Overview
  - 10.20.5 Nanjing New Conda Magnetic Recent Developments
- 10.21 Advanced Technology and Materials
  - 10.21.1 Advanced Technology and Materials Basic Information
  - 10.21.2 Advanced Technology and Materials Iron-based Soft Magnetic Materials Product Overview
  - 10.21.3 Advanced Technology and Materials Iron-based Soft Magnetic Materials Product Market Performance
  - 10.21.4 Advanced Technology and Materials Business Overview
  - 10.21.5 Advanced Technology and Materials Recent Developments
- 10.22 Qingdao Yunlu Advanced Materials
  - 10.22.1 Qingdao Yunlu Advanced Materials Basic Information
  - 10.22.2 Qingdao Yunlu Advanced Materials Iron-based Soft Magnetic Materials Product Overview

- 10.22.3 Qingdao Yunlu Advanced Materials Iron-based Soft Magnetic Materials Product Market Performance
  - 10.22.4 Qingdao Yunlu Advanced Materials Business Overview
  - 10.22.5 Qingdao Yunlu Advanced Materials Recent Developments
- 10.23 Jiangxi Yuean Advanced Materials
  - 10.23.1 Jiangxi Yuean Advanced Materials Basic Information
  - 10.23.2 Jiangxi Yuean Advanced Materials Iron-based Soft Magnetic Materials Product Overview
    - 10.23.3 Jiangxi Yuean Advanced Materials Iron-based Soft Magnetic Materials Product Market Performance
      - 10.23.4 Jiangxi Yuean Advanced Materials Business Overview
      - 10.23.5 Jiangxi Yuean Advanced Materials Recent Developments
- 10.24 ZheJiang NBTM KeDa (KDM)
  - 10.24.1 ZheJiang NBTM KeDa (KDM) Basic Information
  - 10.24.2 ZheJiang NBTM KeDa (KDM) Iron-based Soft Magnetic Materials Product Overview
    - 10.24.3 ZheJiang NBTM KeDa (KDM) Iron-based Soft Magnetic Materials Product Market Performance
      - 10.24.4 ZheJiang NBTM KeDa (KDM) Business Overview
      - 10.24.5 ZheJiang NBTM KeDa (KDM) Recent Developments
- 10.25 Hunan Hualiu New Materials
  - 10.25.1 Hunan Hualiu New Materials Basic Information
  - 10.25.2 Hunan Hualiu New Materials Iron-based Soft Magnetic Materials Product Overview
    - 10.25.3 Hunan Hualiu New Materials Iron-based Soft Magnetic Materials Product Market Performance
      - 10.25.4 Hunan Hualiu New Materials Business Overview
      - 10.25.5 Hunan Hualiu New Materials Recent Developments
- 10.26 Yahao Materials and Technology
  - 10.26.1 Yahao Materials and Technology Basic Information
  - 10.26.2 Yahao Materials and Technology Iron-based Soft Magnetic Materials Product Overview
    - 10.26.3 Yahao Materials and Technology Iron-based Soft Magnetic Materials Product Market Performance
      - 10.26.4 Yahao Materials and Technology Business Overview
      - 10.26.5 Yahao Materials and Technology Recent Developments

## **11 IRON-BASED SOFT MAGNETIC MATERIALS MARKET FORECAST BY REGION**

11.1 Global Iron-based Soft Magnetic Materials Market Size Forecast

11.2 Global Iron-based Soft Magnetic Materials Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Iron-based Soft Magnetic Materials Market Size Forecast by Country

11.2.3 Asia Pacific Iron-based Soft Magnetic Materials Market Size Forecast by Region

11.2.4 South America Iron-based Soft Magnetic Materials Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Iron-based Soft Magnetic Materials by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

12.1 Global Iron-based Soft Magnetic Materials Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Iron-based Soft Magnetic Materials by Type (2026-2035)

12.1.2 Global Iron-based Soft Magnetic Materials Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Iron-based Soft Magnetic Materials by Type (2026-2035)

12.2 Global Iron-based Soft Magnetic Materials Market Forecast by Application (2026-2035)

12.2.1 Global Iron-based Soft Magnetic Materials Sales (K MT) Forecast by Application

12.2.2 Global Iron-based Soft Magnetic Materials Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global Iron-based Soft Magnetic Materials Market Size by Type (M USD)
- Table 4. Global Iron-based Soft Magnetic Materials Market Size by Application
- Table 5. Iron-based Soft Magnetic Materials Market Size Comparison by Region (M USD)
- Table 6. Global Iron-based Soft Magnetic Materials Sales (K MT) by Manufacturers (2020-2025)
- Table 7. Global Iron-based Soft Magnetic Materials Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global Iron-based Soft Magnetic Materials Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global Iron-based Soft Magnetic Materials Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Iron-based Soft Magnetic Materials as of 2025)
- Table 11. Global Market Iron-based Soft Magnetic Materials Average Price (USD/KG) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global Iron-based Soft Magnetic Materials Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. Iron-based Soft Magnetic Materials Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global Iron-based Soft Magnetic Materials Sales by Type (K MT)

- Table 27. Global Iron-based Soft Magnetic Materials Market Size by Type (M USD)
- Table 28. Global Iron-based Soft Magnetic Materials Sales (K MT) by Type (2020-2025)
- Table 29. Global Iron-based Soft Magnetic Materials Sales Market Share by Type (2020-2025)
- Table 30. Global Iron-based Soft Magnetic Materials Market Size (M USD) by Type (2020-2025)
- Table 31. Global Iron-based Soft Magnetic Materials Market Share by Type (2020-2025)
- Table 32. Global Iron-based Soft Magnetic Materials Price (USD/KG) by Type (2020-2025)
- Table 33. Global Iron-based Soft Magnetic Materials Sales (K MT) by Application
- Table 34. Global Iron-based Soft Magnetic Materials Market Size by Application
- Table 35. Global Iron-based Soft Magnetic Materials Sales by Application (2020-2025) & (K MT)
- Table 36. Global Iron-based Soft Magnetic Materials Sales Market Share by Application (2020-2025)
- Table 37. Global Iron-based Soft Magnetic Materials Market Size by Application (2020-2025) & (M USD)
- Table 38. Global Iron-based Soft Magnetic Materials Market Share by Application (2020-2025)
- Table 39. Global Iron-based Soft Magnetic Materials Sales Growth Rate by Application (2020-2025)
- Table 40. Global Iron-based Soft Magnetic Materials Sales by Region (2020-2025) & (K MT)
- Table 41. Global Iron-based Soft Magnetic Materials Sales Market Share by Region (2020-2025)
- Table 42. Global Iron-based Soft Magnetic Materials Market Size by Region (2020-2025) & (M USD)
- Table 43. Global Iron-based Soft Magnetic Materials Market Size by Region (2020-2025)
- Table 44. North America Iron-based Soft Magnetic Materials Sales by Country (2020-2025) & (K MT)
- Table 45. North America Iron-based Soft Magnetic Materials Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe Iron-based Soft Magnetic Materials Sales by Country (2020-2025) & (K MT)
- Table 47. Europe Iron-based Soft Magnetic Materials Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Iron-based Soft Magnetic Materials Sales by Region (2020-2025) & (K MT)

Table 49. Asia Pacific Iron-based Soft Magnetic Materials Market Size by Region (2020-2025) & (M USD)

Table 50. South America Iron-based Soft Magnetic Materials Sales by Country (2020-2025) & (K MT)

Table 51. South America Iron-based Soft Magnetic Materials Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Iron-based Soft Magnetic Materials Sales by Region (2020-2025) & (K MT)

Table 53. Middle East and Africa Iron-based Soft Magnetic Materials Market Size by Region (2020-2025) & (M USD)

Table 54. Global Iron-based Soft Magnetic Materials Production (K MT) by Region(2020-2025)

Table 55. Global Iron-based Soft Magnetic Materials Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Iron-based Soft Magnetic Materials Revenue Market Share by Region (2020-2025)

Table 57. Global Iron-based Soft Magnetic Materials Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 58. North America Iron-based Soft Magnetic Materials Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 59. Europe Iron-based Soft Magnetic Materials Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 60. Japan Iron-based Soft Magnetic Materials Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 61. China Iron-based Soft Magnetic Materials Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 62. Sandvik Basic Information

Table 63. Sandvik Iron-based Soft Magnetic Materials Product Overview

Table 64. Sandvik Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. Sandvik Business Overview

Table 66. Sandvik SWOT Analysis

Table 67. Sandvik Recent Developments

Table 68. Proterial Basic Information

Table 69. Proterial Iron-based Soft Magnetic Materials Product Overview

Table 70. Proterial Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. Proterial Business Overview

Table 72. Proterial SWOT Analysis

- Table 73. Proterial Recent Developments
- Table 74. Amogreentech Basic Information
- Table 75. Amogreentech Iron-based Soft Magnetic Materials Product Overview
- Table 76. Amogreentech Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 77. Amogreentech Business Overview
- Table 78. Amogreentech SWOT Analysis
- Table 79. Amogreentech Recent Developments
- Table 80. Micrometals Basic Information
- Table 81. Micrometals Iron-based Soft Magnetic Materials Product Overview
- Table 82. Micrometals Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 83. Micrometals Business Overview
- Table 84. Micrometals Recent Developments
- Table 85. Epson Atmix Basic Information
- Table 86. Epson Atmix Iron-based Soft Magnetic Materials Product Overview
- Table 87. Epson Atmix Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 88. Epson Atmix Business Overview
- Table 89. Epson Atmix Recent Developments
- Table 90. Dongbu Electronic Materials Basic Information
- Table 91. Dongbu Electronic Materials Iron-based Soft Magnetic Materials Product Overview
- Table 92. Dongbu Electronic Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 93. Dongbu Electronic Materials Business Overview
- Table 94. Dongbu Electronic Materials Recent Developments
- Table 95. Nopion Basic Information
- Table 96. Nopion Iron-based Soft Magnetic Materials Product Overview
- Table 97. Nopion Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 98. Nopion Business Overview
- Table 99. Nopion Recent Developments
- Table 100. Samwha Electronics Basic Information
- Table 101. Samwha Electronics Iron-based Soft Magnetic Materials Product Overview
- Table 102. Samwha Electronics Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 103. Samwha Electronics Business Overview
- Table 104. Samwha Electronics Recent Developments

Table 105. DOWA Electronics Materials Basic Information

Table 106. DOWA Electronics Materials Iron-based Soft Magnetic Materials Product Overview

Table 107. DOWA Electronics Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 108. DOWA Electronics Materials Business Overview

Table 109. DOWA Electronics Materials Recent Developments

Table 110. Daido Steel Basic Information

Table 111. Daido Steel Iron-based Soft Magnetic Materials Product Overview

Table 112. Daido Steel Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 113. Daido Steel Business Overview

Table 114. Daido Steel Recent Developments

Table 115. Hoganäs Basic Information

Table 116. Hoganäs Iron-based Soft Magnetic Materials Product Overview

Table 117. Hoganäs Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 118. Hoganäs Business Overview

Table 119. Hoganäs Recent Developments

Table 120. Nippon Steel Basic Information

Table 121. Nippon Steel Iron-based Soft Magnetic Materials Product Overview

Table 122. Nippon Steel Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 123. Nippon Steel Business Overview

Table 124. Nippon Steel Recent Developments

Table 125. JFE Steel Basic Information

Table 126. JFE Steel Iron-based Soft Magnetic Materials Product Overview

Table 127. JFE Steel Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 128. JFE Steel Business Overview

Table 129. JFE Steel Recent Developments

Table 130. thyssenkrupp Steel Basic Information

Table 131. thyssenkrupp Steel Iron-based Soft Magnetic Materials Product Overview

Table 132. thyssenkrupp Steel Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 133. thyssenkrupp Steel Business Overview

Table 134. thyssenkrupp Steel Recent Developments

Table 135. ArcelorMittal Basic Information

Table 136. ArcelorMittal Iron-based Soft Magnetic Materials Product Overview

- Table 137. ArcelorMittal Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 138. ArcelorMittal Business Overview
- Table 139. ArcelorMittal Recent Developments
- Table 140. voestalpine Basic Information
- Table 141. voestalpine Iron-based Soft Magnetic Materials Product Overview
- Table 142. voestalpine Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 143. voestalpine Business Overview
- Table 144. voestalpine Recent Developments
- Table 145. POCO Magnetic Basic Information
- Table 146. POCO Magnetic Iron-based Soft Magnetic Materials Product Overview
- Table 147. POCO Magnetic Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 148. POCO Magnetic Business Overview
- Table 149. POCO Magnetic Recent Developments
- Table 150. CSC (Changsung Corp.) Basic Information
- Table 151. CSC (Changsung Corp.) Iron-based Soft Magnetic Materials Product Overview
- Table 152. CSC (Changsung Corp.) Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 153. CSC (Changsung Corp.) Business Overview
- Table 154. CSC (Changsung Corp.) Recent Developments
- Table 155. MAGNETICS Basic Information
- Table 156. MAGNETICS Iron-based Soft Magnetic Materials Product Overview
- Table 157. MAGNETICS Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 158. MAGNETICS Business Overview
- Table 159. MAGNETICS Recent Developments
- Table 160. Nanjing New Conda Magnetic Basic Information
- Table 161. Nanjing New Conda Magnetic Iron-based Soft Magnetic Materials Product Overview
- Table 162. Nanjing New Conda Magnetic Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 163. Nanjing New Conda Magnetic Business Overview
- Table 164. Nanjing New Conda Magnetic Recent Developments
- Table 165. Advanced Technology and Materials Basic Information
- Table 166. Advanced Technology and Materials Iron-based Soft Magnetic Materials Product Overview

Table 167. Advanced Technology and Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 168. Advanced Technology and Materials Business Overview

Table 169. Advanced Technology and Materials Recent Developments

Table 170. Qingdao Yunlu Advanced Materials Basic Information

Table 171. Qingdao Yunlu Advanced Materials Iron-based Soft Magnetic Materials Product Overview

Table 172. Qingdao Yunlu Advanced Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 173. Qingdao Yunlu Advanced Materials Business Overview

Table 174. Qingdao Yunlu Advanced Materials Recent Developments

Table 175. Jiangxi Yuean Advanced Materials Basic Information

Table 176. Jiangxi Yuean Advanced Materials Iron-based Soft Magnetic Materials Product Overview

Table 177. Jiangxi Yuean Advanced Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 178. Jiangxi Yuean Advanced Materials Business Overview

Table 179. Jiangxi Yuean Advanced Materials Recent Developments

Table 180. ZheJiang NBTM KeDa (KDM) Basic Information

Table 181. ZheJiang NBTM KeDa (KDM) Iron-based Soft Magnetic Materials Product Overview

Table 182. ZheJiang NBTM KeDa (KDM) Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 183. ZheJiang NBTM KeDa (KDM) Business Overview

Table 184. ZheJiang NBTM KeDa (KDM) Recent Developments

Table 185. Hunan Hualiu New Materials Basic Information

Table 186. Hunan Hualiu New Materials Iron-based Soft Magnetic Materials Product Overview

Table 187. Hunan Hualiu New Materials Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 188. Hunan Hualiu New Materials Business Overview

Table 189. Hunan Hualiu New Materials Recent Developments

Table 190. Yahao Materials and Technology Basic Information

Table 191. Yahao Materials and Technology Iron-based Soft Magnetic Materials Product Overview

Table 192. Yahao Materials and Technology Iron-based Soft Magnetic Materials Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 193. Yahao Materials and Technology Business Overview

Table 194. Yahao Materials and Technology Recent Developments

Table 195. Global Iron-based Soft Magnetic Materials Sales Forecast by Region (2026-2035) & (K MT)

Table 196. Global Iron-based Soft Magnetic Materials Market Size Forecast by Region (2026-2035) & (M USD)

Table 197. North America Iron-based Soft Magnetic Materials Sales Forecast by Country (2026-2035) & (K MT)

Table 198. North America Iron-based Soft Magnetic Materials Market Size Forecast by Country (2026-2035) & (M USD)

Table 199. Europe Iron-based Soft Magnetic Materials Sales Forecast by Country (2026-2035) & (K MT)

Table 200. Europe Iron-based Soft Magnetic Materials Market Size Forecast by Country (2026-2035) & (M USD)

Table 201. Asia Pacific Iron-based Soft Magnetic Materials Sales Forecast by Region (2026-2035) & (K MT)

Table 202. Asia Pacific Iron-based Soft Magnetic Materials Market Size Forecast by Region (2026-2035) & (M USD)

Table 203. South America Iron-based Soft Magnetic Materials Sales Forecast by Country (2026-2035) & (K MT)

Table 204. South America Iron-based Soft Magnetic Materials Market Size Forecast by Country (2026-2035) & (M USD)

Table 205. Middle East and Africa Iron-based Soft Magnetic Materials Sales Forecast by Country (2026-2035) & (Units)

Table 206. Middle East and Africa Iron-based Soft Magnetic Materials Market Size Forecast by Country (2026-2035) & (M USD)

Table 207. Global Iron-based Soft Magnetic Materials Sales Forecast by Type (2026-2035) & (K MT)

Table 208. Global Iron-based Soft Magnetic Materials Market Size Forecast by Type (2026-2035) & (M USD)

Table 209. Global Iron-based Soft Magnetic Materials Price Forecast by Type (2026-2035) & (USD/KG)

Table 210. Global Iron-based Soft Magnetic Materials Sales (K MT) Forecast by Application (2026-2035)

Table 211. Global Iron-based Soft Magnetic Materials Market Size Forecast by Application (2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Iron-based Soft Magnetic Materials
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Iron-based Soft Magnetic Materials Market Size (M USD), 2025-2035
- Figure 5. Global Iron-based Soft Magnetic Materials Market Size (M USD) (2020-2035)
- Figure 6. Global Iron-based Soft Magnetic Materials Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Iron-based Soft Magnetic Materials Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Iron-based Soft Magnetic Materials Product Life Cycle
- Figure 13. Iron-based Soft Magnetic Materials Sales Share by Manufacturers in 2025
- Figure 14. Global Iron-based Soft Magnetic Materials Revenue Share by Manufacturers in 2025
- Figure 15. Iron-based Soft Magnetic Materials Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Iron-based Soft Magnetic Materials Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Iron-based Soft Magnetic Materials Revenue in 2025
- Figure 18. Industry Chain Map of Iron-based Soft Magnetic Materials
- Figure 19. Global Iron-based Soft Magnetic Materials Market PEST Analysis
- Figure 20. Global Iron-based Soft Magnetic Materials Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Iron-based Soft Magnetic Materials Market Share by Type
- Figure 27. Sales Market Share of Iron-based Soft Magnetic Materials by Type (2020-2025)
- Figure 28. Sales Market Share of Iron-based Soft Magnetic Materials by Type in 2025
- Figure 29. Market Share of Iron-based Soft Magnetic Materials by Type (2020-2025)

- Figure 30. Market Share of Iron-based Soft Magnetic Materials by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Iron-based Soft Magnetic Materials Market Share by Application
- Figure 33. Global Iron-based Soft Magnetic Materials Sales Market Share by Application (2020-2025)
- Figure 34. Global Iron-based Soft Magnetic Materials Sales Market Share by Application in 2025
- Figure 35. Global Iron-based Soft Magnetic Materials Market Share by Application (2020-2025)
- Figure 36. Global Iron-based Soft Magnetic Materials Market Share by Application in 2025
- Figure 37. Global Iron-based Soft Magnetic Materials Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Iron-based Soft Magnetic Materials Sales Market Share by Region (2020-2025)
- Figure 39. Global Iron-based Soft Magnetic Materials Market Size by Region (2020-2025)
- Figure 40. North America Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)
- Figure 41. North America Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)
- Figure 42. North America Iron-based Soft Magnetic Materials Sales Market Share by Country in 2024
- Figure 43. North America Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Iron-based Soft Magnetic Materials Market Size by Country in 2024
- Figure 45. U.S. Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)
- Figure 46. U.S. Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Iron-based Soft Magnetic Materials Sales (K MT) and Growth Rate (2020-2025)
- Figure 48. Canada Iron-based Soft Magnetic Materials Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Iron-based Soft Magnetic Materials Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Iron-based Soft Magnetic Materials Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 52. Europe Iron-based Soft Magnetic Materials Sales Market Share by Country in 2024

Figure 53. Europe Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Iron-based Soft Magnetic Materials Market Size by Country in 2024

Figure 55. Germany Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 58. France Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Iron-based Soft Magnetic Materials Sales and Growth Rate (K MT)

Figure 66. Asia Pacific Iron-based Soft Magnetic Materials Sales Market Share by Region in 2024

Figure 67. Asia Pacific Iron-based Soft Magnetic Materials Market Size by Region in 2024

Figure 68. China Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Iron-based Soft Magnetic Materials Sales and Growth Rate (K MT)

Figure 79. South America Iron-based Soft Magnetic Materials Sales Market Share by Country in 2024

Figure 80. South America Iron-based Soft Magnetic Materials Market Size and Growth Rate (M USD)

Figure 81. South America Iron-based Soft Magnetic Materials Market Size by Country in 2024

Figure 82. Brazil Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 85. Argentina Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 87. Columbia Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Iron-based Soft Magnetic Materials Sales and Growth Rate (K MT)

Figure 89. Middle East and Africa Iron-based Soft Magnetic Materials Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Iron-based Soft Magnetic Materials Market Size and

Growth Rate (M USD)

Figure 91. Middle East and Africa Iron-based Soft Magnetic Materials Market Size by Region in 2024

Figure 92. Saudi Arabia Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Iron-based Soft Magnetic Materials Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa Iron-based Soft Magnetic Materials Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Iron-based Soft Magnetic Materials Production Market Share by Region (2020-2025)

Figure 103. North America Iron-based Soft Magnetic Materials Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Iron-based Soft Magnetic Materials Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Iron-based Soft Magnetic Materials Production (K MT) Growth Rate (2020-2025)

Figure 106. China Iron-based Soft Magnetic Materials Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Iron-based Soft Magnetic Materials Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global Iron-based Soft Magnetic Materials Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Iron-based Soft Magnetic Materials Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Iron-based Soft Magnetic Materials Market Share Forecast by Type (2026-2035)

Figure 111. Global Iron-based Soft Magnetic Materials Sales Forecast by Application (2026-2035)

Figure 112. Global Iron-based Soft Magnetic Materials Market Share Forecast by Application (2026-2035)

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