

Global NdFeB grain Boundary Diffusion Process Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global NdFeB grain Boundary Diffusion Process Equipment market size was valued at US\$ 283 million in 2025 and is forecast to a readjusted size of US\$ 490 million by 2032 with a CAGR of 8.0% during review period.

NdFeB grain boundary diffusion process equipment refers to specialized manufacturing equipment used to apply heavy rare-earth or alloy diffusion sources onto sintered NdFeB magnets and then perform vacuum diffusion heat treatment. The process enables elements such as Dy or Tb to diffuse along grain boundaries, improving coercivity and high-temperature demagnetization resistance while reducing the total consumption of heavy rare-earth materials.

NdFeB grain boundary diffusion process equipment is a specialized equipment category used in the production of high-performance sintered NdFeB magnets. The equipment enables heavy rare-earth elements, mainly Dy and Tb, or other alloy diffusion sources to be applied onto magnet surfaces and then diffused along grain boundaries through vacuum heat treatment. The main purpose is to improve coercivity and high-temperature demagnetization resistance while reducing the total consumption of heavy rare-earth materials.

The value of this equipment lies in improving magnet performance through process control rather than simply increasing heavy rare-earth content in the original alloy. Traditional high-coercivity NdFeB magnets often rely on bulk addition of Dy or Tb, which increases material cost and may reduce remanence. Grain boundary diffusion allows heavy rare-earth elements to be concentrated near grain boundaries and surface

regions, improving heavy rare-earth utilization efficiency and supporting the production of higher-grade magnets for demanding applications.

From a process perspective, the equipment market can be divided into three main routes: PVD or magnetron sputtering equipment, slurry spraying or coating equipment, and vacuum grain boundary diffusion furnaces. PVD-based equipment offers better film uniformity, density, adhesion, and process consistency, making it suitable for high-end and large-scale production. Spraying and coating equipment is generally more flexible and cost-effective for different magnet shapes and production batches. Vacuum diffusion furnaces are essential across most process routes, as they directly affect diffusion depth, oxygen control, temperature uniformity, and final magnetic performance consistency.

Demand is mainly driven by high-performance NdFeB magnets used in electric vehicle traction motors, wind turbine generators, industrial servo motors, robots, inverter compressors, energy-efficient appliances, and other high-temperature or high-speed motor applications. These applications require magnets with higher coercivity, better thermal stability, and tighter batch consistency. As a result, magnet manufacturers are investing in grain boundary diffusion capacity to improve product performance while controlling heavy rare-earth consumption.

The competitive landscape is concentrated in China and Japan. Chinese suppliers are becoming increasingly competitive in complete production lines, localized delivery, cost control, automation integration, and close cooperation with domestic magnet manufacturers. Representative suppliers include NAURA, Shenyang Hengjin Vacuum Technology, Shenyang Guangtai Vacuum Technology, Jiangxi Kaiyuan Automation Equipment, and Shenzhen Rongde Robot Technology. Japanese suppliers, represented by ULVAC, have strong experience in rare-earth magnet vacuum heat treatment equipment and process stability. European and North American suppliers are more active in general vacuum heat treatment or customized project-based equipment, but their direct exposure to dedicated NdFeB grain boundary diffusion equipment is more limited.

Future competition will not be determined only by whether the equipment can perform coating or heat treatment. Key differentiators will include diffusion source utilization, coating uniformity, diffusion depth control, vacuum stability, oxygen content control, furnace temperature uniformity, batch-to-batch consistency, automation rhythm, material handling, process data traceability, and integration with magnet manufacturers' proprietary recipes. Suppliers that can provide integrated solutions

covering coating or deposition, vacuum diffusion, loading and unloading, transfer automation, and process control systems will have stronger competitiveness than vendors offering only single standalone machines.

Overall, NdFeB grain boundary diffusion process equipment is a high-value, process-intensive, and customer-specific equipment segment within the rare-earth permanent magnet supply chain. The market is not a high-volume general equipment market, but it benefits from strong technology barriers, high customer stickiness, and the long-term expansion of high-performance magnets in electric vehicles, robotics, wind power, and energy-efficient motors. Over the medium term, growth will be supported by higher demand for premium NdFeB magnets, pressure to reduce Dy and Tb consumption, and the shift from single-machine procurement toward automated and integrated grain boundary diffusion production lines.

This report is a detailed and comprehensive analysis for global NdFeB grain Boundary Diffusion Process Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Equipment Function and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global NdFeB grain Boundary Diffusion Process Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NdFeB grain Boundary Diffusion Process Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NdFeB grain Boundary Diffusion Process Equipment market size and forecasts, by Equipment Function and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global NdFeB grain Boundary Diffusion Process Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit),

2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for NdFeB grain Boundary Diffusion Process Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global NdFeB grain Boundary Diffusion Process Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Beijing NAURA Vacuum Technology, ULVAC, Inc., Shenyang Hengjin Vacuum Technology Co., Ltd., Shenyang Guangtai Vacuum Technology Co., Ltd., Jiangxi Kaiyuan Automation Equipment Co., Ltd., Shenzhen Rongde Robot Technology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

NdFeB grain Boundary Diffusion Process Equipment market is split by Equipment Function and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Equipment Function, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Equipment Function

Diffusion Source Film Formation

Diffusion Source Wet Application

Vacuum Diffusion Heat Treatment

Material Handling and Fixturing

Atmosphere, Vacuum and Thermal Control

Market segment by Diffusion Source Application Route

Magnetron Sputtering

Evaporation or Vapor Deposition

Arc Ion Plating

Slurry Spraying or Coating

Electrophoresis or Wet Coating

Patch, Foil or Block Attachment

Market segment by Diffusion Source Material

Dysprosium-based Sources

Terbium-based Sources

Dy-Tb Mixed Sources

Pr-Nd-based or Light Rare-earth Sources

Alloying Element Composite Sources

Fluoride, Oxide or Compound Sources

Market segment by Application

EV Traction Motor

Wind Turbine Generator

Industrial Servo and Robot Motors

Compressor and Appliance Motors

Consumer Electronics and 3C

Aerospace, Defense and Specialty Motors

Major players covered

Beijing NAURA Vacuum Technology

ULVAC, Inc.

Shenyang Hengjin Vacuum Technology Co., Ltd.

Shenyang Guangtai Vacuum Technology Co., Ltd.

Jiangxi Kaiyuan Automation Equipment Co., Ltd.

Shenzhen Rongde Robot Technology Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of

Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe NdFeB grain Boundary Diffusion Process Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of NdFeB grain Boundary Diffusion Process Equipment, with price, sales quantity, revenue, and global market share of NdFeB grain Boundary Diffusion Process Equipment from 2021 to 2026.

Chapter 3, the NdFeB grain Boundary Diffusion Process Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the NdFeB grain Boundary Diffusion Process Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Equipment Function and by Application, with sales market share and growth rate by Equipment Function, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and NdFeB grain Boundary Diffusion Process Equipment market forecast, by regions, by Equipment Function, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of NdFeB grain Boundary Diffusion Process Equipment.

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