

# **Nickel Market Report by Product Type (Class I Products, Class II Products), Application (Stainless Steel and Alloy Steel, Non-ferrous Alloys and Superalloys, Electroplating, Casting, Batteries, and Others), End-Use Industry (Transportation & Defense, Fabricated Metal Products, Electrical & Electronics, Chemical, Petrochemical, Construction, Consumer Durables, Industrial Machinery, and Others), and Region 2024-2032**

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## **Abstracts**

The global nickel market size reached US\$ 35.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 54.6 Billion by 2032, exhibiting a growth rate (CAGR) of 4.8% during 2024-2032. Rapid technological advancements and innovation, favorable government policies and regulations, burgeoning investments in infrastructure and development projects, and the rising demand for stainless steel products are some of the major factors propelling the market.

Nickel is a versatile metal known for its strength and durability. With excellent resistance to corrosion, nickel finds extensive applications in electroplating, batteries, and stainless steel production. Its unique properties make it a preferred choice for demanding environments, such as chemical plants and marine equipment. Nickel alloys, such as Inconel and Monel, offer exceptional heat resistance, making them ideal for high-temperature applications in aerospace and power generation. Moreover, it plays a crucial role in producing electric vehicle (EV) batteries, rechargeable batteries, electric motors, and generators.

The global nickel market is being driven by various factors, such as the increasing demand for nickel in the stainless steel industry and the increasing adoption of EVs. Moreover, rapid infrastructure development and urbanization are fueling the demand for nickel in construction materials, particularly to produce stainless steel reinforcement bars, which is supporting the market growth. Furthermore, advancements in technology and the widespread application of nickel in various industrial sectors, such as aerospace, electronics, and chemical processing, are contributing to the market growth. Another driver is the continuous development of nickel mining projects globally, including new discoveries and the expansion of existing operations, ensuring a steady supply of the metal. Additionally, the emergence of new technologies and materials and government policies and regulations related to mining, trade, environmental protection, and sustainability practices are propelling the market growth.

#### Nickel Market Trends/Drivers:

##### Growing demand for nickel in the stainless steel industry

The stainless steel industry is a major consumer of nickel, utilizing it as a key alloying element to enhance the strength, corrosion resistance, and durability of stainless steel products. The rising demand for stainless steel in various sectors, including construction, automotive, and consumer goods, is driving the market growth. In construction, stainless steel is widely used in infrastructure projects, such as bridges, railways, and buildings, due to its excellent structural properties and resistance to corrosion. In the automotive sector, nickel-containing stainless steel is utilized in components like exhaust systems and catalytic converters. Additionally, the increasing popularity of stainless steel appliances and utensils in households further boosts the demand for nickel.

##### Increasing adoption of EVs

Nickel is a key component in the cathode of rechargeable lithium-ion batteries used in EVs. As governments and consumers worldwide prioritize reducing greenhouse gas emissions and dependence on fossil fuels, the demand for EVs is experiencing significant growth. This, in turn, drives the demand for nickel in the battery sector. Nickel-based lithium-ion batteries offer higher energy density, improved longevity, and increased driving range, making them essential for the widespread adoption of EVs. As major automotive manufacturers continue to invest in EV production and governments implement supportive policies and incentives, the demand for nickel in the battery sector is expected to rise exponentially, creating a strong driver for the global nickel market.

## Infrastructure development and urbanization in emerging economies

Nickel is extensively used in producing stainless steel reinforcement bars, which are crucial components in construction projects, including buildings, bridges, and highways. As developing countries experience population growth, increased urbanization, and rising standards of living, the demand for infrastructure expands. Stainless steel reinforcement bars offer superior strength, durability, and resistance to corrosion, making them a preferred choice for construction purposes. As a result, the demand for nickel in the construction sector, driven by infrastructure development and urbanization, continues to grow.

### Nickel Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global nickel market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on product type, application and end-use industry.

### Breakup by Product Type:

Class I Products

Class II Products

Class I products dominate the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes class I and class II products. According to the report, class I products represented the largest segment.

Class I nickel products are high-purity nickel suitable for use in advanced technological applications, including the production of batteries for electric vehicles and energy storage. The purity level of Class I nickel is typically higher than 99.8%. These products include electrolytic nickel, nickel briquettes, nickel carbonyl, nickel powder, and nickel sulfate. Consequently, surge in the electric vehicle industry, a shift towards renewable energy, the implementation of stringent regulations to reduce carbon emissions, and increasing urbanization and industrial activities are driving the market growth.

On the other hand, class 2 nickel products include lower-purity nickel sources. These products include ferronickel, nickel pig iron (NPI), and nickel oxide, and they typically have a nickel content of less than 99.8%. Class 2 nickel is commonly used in stainless

steel manufacturing and other industries where high purity isn't as critical. The primary driver of Class 2 nickel demand is its extensive use in stainless steel production. Nickel improves the corrosion resistance and mechanical properties of stainless steel, making it suitable for a variety of applications. Moreover, with the increasing pace of global urbanization and infrastructure development, the demand for materials like stainless steel - and by extension, Class 2 nickel has surged, thus favoring the market growth.

#### Breakup by Application:

- Stainless Steel and Alloy Steel
- Non-ferrous Alloys and Superalloys
- Electroplating
- Casting
- Batteries
- Others

Stainless steel and alloy steel holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes stainless steel and alloy steel, non-ferrous alloys and superalloys, electroplating, casting, batteries, and others. According to the report, stainless steel and alloy steel accounted for the largest market share.

Stainless steel, a highly durable and corrosion-resistant material, finds extensive use in the construction, automotive, and aerospace industries due to its superior strength-to-weight ratio. Alloy steel, made from a blend of iron with elements like nickel, chromium, and molybdenum, is renowned for its mechanical strength, toughness, and wear resistance, making it ideal for structural components and machinery. Non-ferrous alloys such as copper, aluminum, and titanium are prevalent in electronics, aerospace, and automotive industries, offering lightweight, electrically conductive, and corrosion-resistant solutions. Superalloys, with their exceptional resistance to high temperatures and oxidation, are critical in aircraft engines, gas turbines, and nuclear reactors. Electroplating enhances object aesthetics and durability, while casting enables accurate, complex shapes for automotive, aerospace, and construction applications. Nickel is essential in rechargeable batteries, offering high energy density and longevity. It also finds applications in chemical processing, oil and gas refining, heat exchangers, and medical equipment due to its corrosion resistance and high-temperature tolerance.

#### Breakup by End-Use Industry:

Transportation & Defense  
Fabricated Metal Products  
Electrical & Electronics  
Chemical  
Petrochemical  
Construction  
Consumer Durables  
Industrial Machinery  
Others

Transportation and defense holds the largest share in the market

A detailed breakup and analysis of the market based on the end-use industry has also been provided in the report. This includes transportation & defense, fabricated metal products, electrical & electronics, chemical, petrochemical, construction, consumer durables, industrial machinery, and others. According to the report, transportation and defense accounted for the largest market share.

Nickel has diverse applications across numerous sectors. In transportation and defense, it is used in stainless and alloy steels to enhance durability and corrosion resistance, crucial for vehicles and military equipment. Fabricated metal products also leverage nickel for its robustness and resistance properties. In the electrical and electronics sector, nickel's high electrical conductivity makes it integral in components and battery technologies. The chemical and petrochemical industries use nickel-based alloys in processing equipment due to their exceptional resistance to harsh chemicals and high temperatures. In construction, nickel strengthens and provides corrosion resistance to structural steel. Consumer durables often incorporate nickel for its aesthetic appeal and durability, while industrial machinery utilizes nickel-alloyed steel for enhanced longevity and performance. The 'others' category includes sectors like medical, where nickel's non-corrosive properties make it suitable for surgical equipment, and energy, where it's used in batteries and renewable energy systems.

Breakup by Region:

Asia Pacific  
China  
Japan  
India

South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
North America  
United States  
Canada  
Latin America  
Brazil  
Mexico  
Argentina  
Colombia  
Chile  
Peru  
Others  
Middle East and Africa  
Turkey  
Saudi Arabia  
Iran  
United Arab Emirates  
Others

Asia Pacific exhibits a clear dominance, accounting for the largest nickel market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, Argentina, Colombia, Chile, Peru, and others); and the Middle East and Africa (Turkey, Saudi Arabia, Iran, United Arab Emirates, and others).

Asia Pacific has emerged as a market leader for nickel due to its vast population, rapid industrialization, and dynamic economic growth. Countries like China, Japan, South Korea, and India have become manufacturing powerhouses, offering cost-effective production capabilities and a massive consumer base. The region's strong focus on exports, technological advancements, and investments in research and development have propelled industries such as electronics, automotive, telecommunications, and e-commerce, driving its market leadership. In line with this, the escalating adoption of electric vehicles (EVs) in the region is driving the need for high-purity nickel in battery production, given nickel's crucial role in enhancing energy density and longevity of lithium-ion batteries. Governments in this region are also implementing favorable policies and providing subsidies for EVs and renewable energy, indirectly influencing the nickel market. Besides this, the region's growing economy increases demand for consumer goods and infrastructure, leading to more nickel use in these products and structures.

#### Competitive Landscape:

The competitive landscape of the nickel market is characterized by the presence of several key players vying for market share. These companies operate across various segments of the nickel value chain, including mining, refining, production, and distribution. Some of the prominent players in the market have established themselves as major nickel producers, leveraging their extensive mining operations and technological expertise. Furthermore, the market is also witnessing the emergence of new players, particularly in countries with substantial nickel reserves, such as Indonesia and the Philippines. As the demand for nickel continues to grow, competition intensifies, leading to strategic collaborations, investments in research and development, and expansion of production capacities to maintain a competitive edge in the dynamic nickel market.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Anglo American Plc  
BHP Group Limited  
Cunco Corporation  
Eramet Group  
Glencore Plc  
IGO Limited  
Jinchuan Group International Resources Co. Ltd.



Norilsk Nickel  
Pacific Metal Company  
Queensland Nickel Group  
Sherritt International Corporation  
Sumitomo Corporation  
Terraframe Ltd.  
Vale S.A.  
Votorantim SA.

#### Recent Developments:

On July 11, 2023, JX Metals Corporation (JX Metals) and BHP signed a memorandum of understanding (MoU) to pursue the development of a Green Enabling Partnership aimed at supporting both parties' ambitions of reducing greenhouse gas (GHG) emissions in the copper supply chain and making the copper supply chain more sustainable.

On June 08, 2023, Sumitomo Corporation completed the acquisition of Saconix LLC. from U.S. private equity fund to make Saconix, a wholly owned subsidiary of the Sumitomo Corporation Group.

On January 26, 2023, Eramet Group signed an exclusive Memorandum of Understanding (MOU) with ?lectricit? de Strasbourg (?S) to study the development of a lithium production facility from a geothermal source in Alsace, France.

#### Key Questions Answered in This Report

1. What was the size of the global nickel market in 2023?
2. What is the expected growth rate of the global nickel market during 2024-2032?
3. What are the key factors driving the global nickel market?
4. What has been the impact of COVID-19 on the global nickel market?
5. What is the breakup of the global nickel market based on the product type?
6. What is the breakup of the global nickel market based on the application?
7. What is the breakup of the global nickel market based on the end-use industry?
8. What are the key regions in the global nickel market?
9. Who are the key players/companies in the global nickel market?



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