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Soft Magnetic Materials Market Report by Material (Cobalt, Iron, Nickel, Electric Steel, and Others), Application (Motors, Transformers, Alternators, and Others), End Use (Automotive, Electrical and Electronics, Telecommunication, Energy and Power, and Others), and Region 2024-2032

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Abstracts

The global soft magnetic materials market size reached US$ 31.8 Billion in 2023. Looking forward, the market is expected to reach US$ 61.0 Billion by 2032, exhibiting a growth rate (CAGR) of 7.3% during 2024-2032. The market is being pushed by increased demand for electric and hybrid vehicles, developing renewable energy infrastructure, and recent technological developments, with considerable expansion in Asia-Pacific, bringing both challenges and possibilities for innovation and sustainability.

Soft Magnetic Materials Market Analysis:

Major Market Drivers: The increasing adoption of electric and hybrid vehicles is significantly driving the demand for soft magnetic materials. Furthermore, increasing investment in renewable energy infrastructure, as well as rapid improvements in electronics and telecommunications, are driving the soft magnetic materials market growth.

Key Market Trends: Continuous innovation in high-grade and ultra-thin electric steel, which is enhancing the efficiency of electrical devices, is one of the major soft magnetic materials market trends. Aside from that, the ongoing shift towards automation and robotics in industrial applications, which is increasing the demand for advanced soft magnetic materials in motors and sensors, is

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strengthening the market share.

Geographical Trends: Asia-Pacific dominates the market, driven by rapid industrialization, urbanization, and significant investments in automotive and electronics manufacturing. Other regions are also experiencing growth because of the increasing adoption of renewable energy sources and advancements in electric vehicle technology.

Competitive Landscape: Some of the major market players in the soft magnetic materials industry include Arnold Magnetic Technologies, Daido Steel Co. Ltd., GKN Sinter Metals Engineering GmbH, Hitachi Ltd., Mate Co. ltd., Meyer Sintermetall AG, SG Technologies, Steward Advanced Materials, Sumitomo Metal Mining Co. Ltd., Toshiba Materials Co Ltd (Toshiba Corporation), Vacuumschmelze GmbH & Co KG., among many others.

Challenges and Opportunities: High production costs and the need for continuous technological advancements pose challenges for the soft magnetic material industry. However, regulatory policies promoting energy efficiency and renewable energy adoption and expanding product applications in emerging technologies are providing new growth opportunities for the soft magnetic material companies.

Soft Magnetic Materials Market Trends:

Increasing Demand in Automotive Industry

According to the latest soft magnetic materials market report, the automotive industry is undergoing a transformative shift with the increasing adoption of electric and hybrid vehicles. 2023 saw the registration of about 14 million new electric cars worldwide, increasing the total number of automobiles on the road to 40 million. Aside from that, electric car sales in 2023 increased by 35 percent year on year. Soft magnetic materials serve an important role in the effective operation of electric motors, transformers, and other components found in electric and hybrid cars. Furthermore, automakers are striving to meet stringent emission regulations and consumer demand for more environmentally friendly options, resulting in the heightened utilization of soft magnetic materials for enhancing the performance and efficiency of electric drivetrains. Additionally, advancements in magnetic materials are also contributing to the development of more compact and powerful motors, which are crucial for the next

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generation of electric vehicles (EVs).

Expansion of Renewable Energy

The renewable energy business is expanding rapidly, propelled by a global demand for sustainable and ecologically favorable energy sources. For example, the share of renewables in the European Union's (EU) final energy consumption climbed by more than one percentage point from 2021 to 23% in 2022. The bloc's 2030 renewable energy objective is 42.5%. Soft magnetic materials are essential components in various renewable energy systems, particularly in wind turbine generators and solar inverters. These materials are crucial for efficient energy conversion and storage, making them indispensable in the development of renewable energy infrastructure. Additionally, ongoing technological advancements in renewable energy technologies, which continue to enhance the efficiency and cost-effectiveness of these systems, are further expanding the soft magnetic materials market share.

Advancements in Electronics and Telecommunication

Consumer electronics, such as smartphones, tablets, laptops, and wearable devices, require highly efficient magnetic components for their compact and power-efficient designs. The current soft magnetic materials market outlook highlights the use of these materials in inductors, transformers, and other components essential for power management and signal processing. Moreover, the expansion of telecommunication infrastructure, including the rollout of fifth-generation (5G) networks, which necessitates the use of advanced magnetic materials in base stations, antennas, and other communication equipment to ensure high performance and reliability, is contributing to the soft magnetic materials market size. Additionally, the trend towards miniaturization of electronic components, coupled with the need for higher energy efficiency, is driving innovation in soft magnetic materials, enabling the development of smaller, lighter, and more efficient devices.

Soft Magnetic Materials Market Segmentation:

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

Breakup by Material:

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Cobalt

Iron

Nickel

Electric Steel

Others

Electric steel accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the material. This includes cobalt, iron, nickel, electric steel, and others. According to the report, electric steel represented the largest segment.

Electric steel, also known as silicon steel or transformer steel, holds the majority of the soft magnetic materials market share due to its superior magnetic properties and widespread application in electrical devices. This type of steel is specially engineered to have high permeability and low coercivity, making it ideal for use in transformers, inductors, and motors, which are essential components in various electrical and electronic devices. Furthermore, the ability of electric steel to efficiently conduct magnetic fields and reduce energy losses makes it a preferred choice for manufacturers aiming to enhance the performance and efficiency of their products.

Breakup by Application:

Motors

Transformers

Alternators

Others

Motors holds the largest share of the industry

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A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes motors, transformers, alternators, and others. According to the report, motors accounted for the largest market share.

Motors are dominating this segment, as highlighted in the latest soft magnetic materials market report, because of their extensive use across various industries, including automotive, industrial machinery, and consumer electronics. Soft magnetic materials are critical in motor applications due to their ability to enhance magnetic flux, minimize energy losses, and improve overall efficiency. Additionally, the transition towards electric and hybrid vehicles has significantly increased the demand for electric motors, which rely heavily on soft magnetic materials for optimal performance. Furthermore, industrial applications such as robotics, automation, and heating, ventilation, and air conditioning (HVAC) systems require efficient and reliable motors to ensure operational excellence.

Breakup by End Use:

- Automotive
- Electrical and Electronics
- Telecommunication
- Energy and Power
- Others

Electrical and electronics represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end use. This includes automotive, electrical and electronics, telecommunication, energy and power, and others. According to the report, electrical and electronics represented the largest segment.

The electrical and electronics sector represents the largest market share, reflecting the pervasive use of these materials in a wide array of electronic devices and electrical systems. Soft magnetic materials are integral to the functionality of transformers, inductors, sensors, and various other components that form the backbone of modern

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electronics. These materials enable the miniaturization and enhancement of devices such as smartphones, tablets, laptops, and wearable technology. Furthermore, the efficiency of power generation, transmission, and distribution systems is heavily reliant on the quality of soft magnetic materials used. Additionally, the growing demand for smart home devices, renewable energy solutions, and advanced telecommunication infrastructure further underscores the importance of these materials.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

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Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia-Pacific leads the market, accounting for the largest soft magnetic materials 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); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia-Pacific represents the largest regional market for soft magnetic materials.

Based on the recent soft magnetic materials market forecast, Asia-Pacific is the dominant region due to its robust industrial base, rapid economic growth, and substantial investments in infrastructure development. Countries like China, Japan, South Korea, and India are at the forefront of technological advancements and industrial production, making them significant consumers of soft magnetic materials. Besides this, the burgeoning automotive industry in Asia-Pacific, particularly the surge in electric vehicle (EV) manufacturing, has amplified the demand for these materials. Additionally, the region's strong presence in the electronics manufacturing sector, producing a vast array of consumer electronics, industrial machinery, and telecommunication equipment, is further driving the market growth.

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Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the soft magnetic materials industry include Arnold Magnetic Technologies, Daido Steel Co. Ltd., GKN Sinter Metals Engineering GmbH, Hitachi Ltd., Mate Co. ltd., Meyer Sintermetall AG, SG Technologies, Steward Advanced Materials, Sumitomo Metal Mining Co. Ltd., Toshiba Materials Co Ltd (Toshiba Corporation) and Vacuumschmelze GmbH & Co KG.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Leading soft magnetic materials companies are actively pursuing a range of strategic initiatives to maintain and strengthen their market positions. These players are heavily investing in research and development (R&D) to innovate and enhance the performance characteristics of soft magnetic materials. Additionally, companies are also expanding their production capacities and optimizing manufacturing processes to improve cost efficiency and meet the growing global demand. Moreover, they are expanding their geographic footprint to capitalize on the rapid industrialization and urbanization in the region. Besides this, mergers and acquisitions are being pursued by major players to consolidate market positions, acquire new technologies, and enter new market segments.

Soft Magnetic Materials Market News:

In March 2023: Daido Steel, a Japan-based steel producer, has announced that it will invest JPY 5.2 billion ($ 39.58 million) to construct two new special melting facilities at its Chita No.2 plant. This will increase the company’s production capacity for high-grade steel to meet the increasing demand for these steel in semiconductor manufacturing equipment.

In October 2023: GKN Powder Metallurgy and Schaeffler AG announced a joint commitment to further the development of permanent magnet industry in Europe and North America.

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Key Questions Answered in This Report

1. What was the size of the global soft magnetic materials market in 2023?

2. What is the expected growth rate of the global soft magnetic materials market during 2024-2032?

3. What are the key factors driving the global soft magnetic materials market?

4. What has been the impact of COVID-19 on the global soft magnetic materials market?

5. What is the breakup of the global soft magnetic materials market based on the material?

6. What is the breakup of the global soft magnetic materials market based on the application?

7. What is the breakup of the global soft magnetic materials market based on the end use?

8. What are the key regions in the global soft magnetic materials market?

9. Who are the key players/companies in the global soft magnetic materials market?

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