

Rare Earths Mining and Processing Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/RB149BDEDB97EN.html>

Date: April 2025

Pages: 88

Price: US\$ 3,200.00 (Single User License)

ID: RB149BDEDB97EN

Abstracts

Rare Earths Mining and Processing Market Summary

Introduction

Rare Earths Mining and Processing involves the extraction and refinement of 17 rare earth elements (REEs), critical for advanced technologies like electric vehicles, wind turbines, and consumer electronics. These elements, split into Light Rare Earths (LREEs) and Heavy Rare Earths (HREEs), are abundant in the Earth's crust (90 million tons in reserves) but challenging to mine economically due to low concentrations. In 2024, global production reached 390,000 tons of rare earth oxide (REO) equivalent, with China contributing 69%, followed by the U.S., Myanmar, and Australia. On February 19, 2025, China began soliciting public feedback on new REE regulations to tighten domestic control over mining, smelting, and quotas, building on its 2023 export bans on rare earth magnet technologies. The industry is defined by its strategic importance, geopolitical tensions, and efforts to diversify supply chains amid rising demand for green and high-tech applications.

Market Size and Growth Forecast

The global Rare Earths Mining and Processing market is estimated at USD 12 billion to USD 14 billion in 2025, with a projected CAGR of 10% to 12% through 2030, potentially reaching USD 20 billion to USD 24 billion, driven by clean energy and tech growth.

Regional Analysis

North America: Expected at 8% to 10%, the U.S. focuses on reducing China dependency. Trends emphasize domestic mining and recycling.

Europe: Forecasted at 9% to 11%, Germany and France lead in tech applications. Trends highlight supply diversification.

Asia Pacific: Projected at 11% to 13%, China dominates, with Japan as a consumer. Trends focus on regulatory tightening and export controls.

South America: Anticipated at 7% to 9%, Chile explores REE potential. Trends favor new mining projects.

Middle East and Africa: Expected at 6% to 8%, South Africa grows. Trends emphasize resource development.

Application Analysis

Automotive: Projected at 12% to 14%, driven by EV batteries. Trends focus on electrification.

Consumer Electronics: Expected at 10% to 12%, for smartphones and screens. Trends highlight miniaturization.

Industrial: Forecasted at 9% to 11%, in machinery. Trends emphasize efficiency.

Others (Wind Power, Aerospace, Medical): Anticipated at 8% to 10%, with diverse uses. Trends focus on sustainability.

Type Analysis

Light Rare Earths: Projected at 9% to 11%, abundant and widely used. Trends emphasize cost efficiency.

Heavy Rare Earths: Expected at 11% to 13%, scarce and critical for high-tech. Trends focus on supply security.

Key Market Players

MP Materials: A U.S. firm, it operates the Mountain Pass mine.

Lynas: An Australian leader, it processes REEs for global markets.

M2i GLOBAL: A U.S. entity, it focuses on supply chain solutions.

China Northern Rare Earth: A Chinese giant, it dominates production.

China Minmetals: A Chinese firm, it integrates mining and processing.

CHINALCO: A Chinese player, it expands REE capacity.

Xiamen Tungsten: A Chinese company, it specializes in downstream REEs.

Guangdong Rare Earth: A Chinese entity, it supports regional supply.

China Rare Earth Group: A Chinese conglomerate, it consolidates control.

Porter's Five Forces Analysis

Threat of New Entrants: Low, due to high capital and regulatory barriers.

Threat of Substitutes: Moderate, with alternatives emerging but limited scalability.

Bargaining Power of Buyers: Moderate, as tech firms demand stable supply.

Bargaining Power of Suppliers: High, with China's dominance.

Competitive Rivalry: Moderate-to-high, with geopolitical supply diversification efforts.

Market Opportunities and Challenges

Opportunities

Green Tech Demand: EVs and renewables boost REE needs.

Diversification Efforts: Non-China mining grows in the U.S. and Australia.

Recycling Potential: Secondary REE sources expand.

Policy Support: Incentives for sustainable mining rise.

Tech Innovation: New extraction methods lower costs.

Challenges

China's Dominance: Export controls disrupt supply.

Environmental Costs: Mining pollution faces scrutiny.

High Capital Needs: Entry barriers limit new players.

Geopolitical Risks: Trade tensions affect stability.

Supply Scarcity: HREEs remain constrained.

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