

Global and China NdFeB Industry Report, 2014-2018

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Abstracts

As the third-generation rare earth permanent magnet material, NdFeB is featured with small size, light weight, strong magnetic force and other characteristics as well as widely used in consumer electronics, transportation, wind power, automobile, medical equipment and other fields.

The growth of China's downstream demand for new energy vehicles and wind power equipment, the tightened supply of rare earth material and other factors have boosted the global NdFeB capacity to by degrees shift to China in recent years. In 2013, China's NdFeB output was 94 kt, accounting for 91.0% of the global output; wherein, China's high-performance NdFeB output hit 22 kt, sharing 54.3% of the global total.

As for companies, Hitachi Metals, Shin-Etsu Chemical and TDK have monopolized 48% share of the world's high-performance NdFeB market.

Hitachi Metals holds 615 patents as the world's largest manufacturer of high-performance NdFeB. As of the end of 2013, it had authorized eight Chinese NdFeB companies with 149 patents, of which four ones had been expired. Currently, all NdFeB production bases of Hitachi Metals are located in Japan, while its subsidiaries/branches or agents in China are responsible for marketing.

The high-performance NdFeB of Shin-Etsu Chemical are mainly used in hybrid cars, EPS, VCM, consumer electronics and other fields. In early 2013, the company put its Hybrid Car-Use NdFeB Production Base Project (Phase I) in Fujian into production with the annual output of 3 kt of rare earth magnetic alloy sheets which are completely exported to Japan.

In addition to Japanese companies, Zhong Ke San Huan, Zhenghai Magnetic Material, Ningbo Yunsheng, Baotou Steel Rare-earth and other Chinese key enterprises also

highlight high-performance NdFeB and have launched a number of projects to enhance the high-performance NdFeB capacity.

Zhong Ke San Huan: The company acts as China's largest NdFeB manufacturer. At the end of August 2014, the company's subsidiary Tianjin Sanhuan Lucky New Material Inc. planned to invest RMB200 million in building a 2 kt/a high-performance NdFeB automated production line, and expand its capacity to 5kt/a in accordance with market demand.

Zhenghai Magnetic Material: Early in 2012, it lavished RMB190 million in expanding high-performance NdFeB permanent magnet capacity. The project is expected to be completed in December 2014, with the additional high-performance NdFeB capacity of 2 kt/a.

Baotou Steel Rare-earth: It accomplished the commissioning of 15 kt/a NdFeB Strip Casting Alloy and 5 kt/a NdFeB Magnet Project (Phase II) in May 2014, and the products will be mainly used for wind power generation, high-end permanent magnetic resonance imaging devices, automotive motors and other high-end areas.

The report focuses on the following:

The global NdFeB market size, market structure, competitive landscape, etc.;

Chinese NdFeB market size, market structure, competition, import and export, etc.;

Downstream NdFeB demand, competition pattern, etc.;

Operation of 5 global and 15 Chinese NdFeB manufacturers.

Contents

1 INTRODUCTION TO NDFEB INDUSTRY

- 1.1 Definition
- 1.2 Product Category
- 1.3 Industry Chain

2 STATUS QUO OF GLOBAL NDFEB MARKET

- 2.1 Market Size
- 2.2 Market Structure
- 2.3 Competition Pattern

3 STATUS QUO OF CHINESE NDFEB MARKET

- 3.1 Industrial Policy
- 3.2 Market Size
- 3.3 Market Structure
- 3.4 Cost Structure
- 3.5 Import and Export
 - 3.5.1 Import
 - 3.5.2 Export
- 3.6 Competition Pattern

4 UPSTREAM AND DOWNSTREAM OF NDFEB INDUSTRY

- 4.1 Raw Material Price
- 4.2 Application Fields
 - 4.2.1 New Energy Vehicles
 - 4.2.2 Wind Power Equipment
 - 4.2.3 Inverter Air Conditioners

5 MAJOR FOREIGN NDFEB MANUFACTURERS

- 5.1 Hitachi Metals
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure

- 5.1.4 NdFeB Business
- 5.1.5 Layout in China
- 5.2 Shin-Etsu Chemical
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Revenue Structure
 - 5.2.4 NdFeB Business
- 5.3 TDK
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Revenue Structure
 - 5.3.4 NdFeB Business
- 5.4 Other Enterprises
 - 5.4.1 Seiko Epson
 - 5.4.2 VAC

6 MAJOR CHINESE NDFEB MANUFACTURERS

- 6.1 Beijing Zhong Ke San Huan
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 NdFeB Business
 - 6.1.5 Development
- 6.2 Yantai Zhenghai Magnetic Material
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure
 - 6.2.4 NdFeB Business
 - 6.2.5 R & D
 - 6.2.6 Main Projects
- 6.3 Ningbo Yunsheng
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Revenue Structure
 - 6.3.4 NdFeB Business
 - 6.3.5 Development Strategy
- 6.4 AT & M
 - 6.4.1 Profile

- 6.4.2 Operation
- 6.4.3 Revenue Structure
- 6.4.4 NdFeB Business
- 6.4.5 Development
- 6.5 Inner Mongolia Baotou Steel Rare-earth
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Revenue Structure
 - 6.5.4 Gross Margin
 - 6.5.5 NdFeB Business
 - 6.5.6 Development
- 6.6 Xiamen Tungsten
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Revenue Structure
 - 6.6.4 NdFeB Business
- 6.7 Taiyuan Twin-Tower Aluminum Oxide
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Revenue Structure
 - 6.7.4 Gross Margin
 - 6.7.5 NdFeB Business
 - 6.7.6 Development
- 6.8 Sinosteel Anhui Tianyuan Technology
 - 6.8.1 Profile
 - 6.8.2 Operation
 - 6.8.3 Revenue Structure
 - 6.8.4 NdFeB Business
 - 6.8.5 Main Projects
- 6.9 Rising Nonferrous Metals
 - 6.9.1 Profile
 - 6.9.2 Major Customers
 - 6.9.3 Operation
 - 6.9.4 Revenue Structure
 - 6.9.5 Gross Margin
 - 6.9.6 NdFeB Business
 - 6.9.7 Development
- 6.10 Zhongshan Broad-Ocean Motor
 - 6.10.1 Profile

- 6.10.2 Operation
- 6.10.3 Revenue Structure
- 6.10.4 Gross Margin
- 6.10.5 NdFeB Business
- 6.11 Chengdu Galaxy Magnets
 - 6.11.1 Profile
 - 6.11.2 Operation
 - 6.11.3 Revenue Structure
 - 6.11.4 NdFeB Business
 - 6.11.5 Main Projects
- 6.12 Other Enterprises
 - 6.12.1 Tianjin Jinbin New Material Industry Co., Ltd.
 - 6.12.2 Yantai Shougang Magnetic Materials Co., Ltd.
 - 6.12.3 Beijing Jingci Magnet
 - 6.12.4 Beijing Thinova

7 SUMMARY AND FORECAST

- 7.1 Market
- 7.2 Enterprises

Selected Charts

SELECTED CHARTS

Elements of NdFeB

Performance Comparison between NdFeB Permanent Magnet Materials and Counterparts

Classification of NdFeB

NdFeB Industry Chain

Proportion of Bonded NdFeB Downstream Applications, 2013

Expiration of Main Global NdFeB Patents

Enterprises Holding Authorized NdFeB Patents in China, by H1 2014

Global NdFeB Output and Growth Rate, 2008-2018E

Global High-performance NdFeB Output, 2008-2018E

Global NdFeB Output Structure (by Country), 2013

Global High-performance NdFeB Output Structure (by Country), 2013

Global Downstream NdFeB Consumption Structure, 2013

Global High-performance NdFeB Market Competition Pattern, 2013

Global High-performance NdFeB Competition Pattern, 2016E

NdFeB-related Industrial Policies in China, 2000-2014

China's NdFeB Output and Growth Rate, 2006-2018E

China's High-performance NdFeB Output and Growth Rate, 2007-2014

China's NdFeB Capacity Distribution, 2014

China's High-performance NdFeB Demand (by Field), 2010-2014

China's NdFeB Cost Structure, 2013

Import Volume and Value of NdFeB and Related Products, 2011-2014

Import Value Structure of NdFeB and Related Products (by Country / Region), 2013

Export Volume and Export Value of NdFeB and Related Products, 2013

NdFeB Permanent Magnet Export Volume Structure (by Country / Region), 2013

NdFeB Magnetic powder Export Volume Structure (by Country / Region), 2013

Export Volume Structure of Other Neodymium-Iron Alloy (by Country / Region), 2013

Capacity Structure of NdFeB Production Enterprises, 2014

Capacity of Major Chinese NdFeB Manufacturers, 2014

China's Metal Neodymium Price, 2013-2014

China's Metal Praseodymium Price, 2013-2014

China's New Energy Vehicle Output, 2011-2014

Performance Comparison between Permanent Magnet Motors and Other Motors

Mainstream Global New Energy Vehicle Driving Motors, 2013

NdFeB Demand Generated by New Energy Vehicles in China, 2009-2014

China's Wind Power Installed Capacity, 2006-2014
NdFeB Demand Generated by Wind Power Equipment in China, 2008-2014
NdFeB Demand Generated by Inverter air conditioners in China, 2011-2017E
Global Business Layout of Hitachi Metals
Revenue and Net Income of Hitachi Metals, FY2010-FY2014
Revenue Structure of Hitachi Metals (by Product), FY2014
Global Market Expansion Strategy of Hitachi Metals, 2015E
Magnetic Material Revenue of Hitachi Metals, FY2012-FY2014
NdFeB Production Bases of Hitachi Metals, FY2014
Distribution of Enterprises of Hitachi Metals in China, 2014
Revenue and Net Income of Shin-Etsu Chemical, FY2004-FY2014
Revenue Structure of Shin-Etsu Chemical (by Business), FY2014
Revenue Structure of Shin-Etsu Chemical (by Region), FY2014
Distribution of NdFeB Production Bases of Shin-Etsu Chemical
TDK's Global Marketing Network
TDK's Revenue and Net Income, FY2010-FY2015
TDK's Revenue Structure (by Product), FY2013-FY2014
TDK's Revenue Structure (by Region), FY2010-FY2014
TDK's Main Magnetic Products
Global Marketing Network of Seiko Epson
VAC's Operating Revenue Structure (by Product), 2014
Revenue and Net Income of Zhong Ke San Huan, 2009-2014
Operating Revenue of Zhong Ke San Huan (by Product), 2008-2013
Revenue Structure of Zhong Ke San Huan (by Region), 2008/2013
Revenue of NdFeB Subsidiaries of Zhong Ke San Huan, 2013
NdFeB Revenue and Growth Rate of Zhong Ke San Huan, 2003-2013
Main NdFeB Application Fields of Zhong Ke San Huan, 2013
Revenue and Net Income of Zhenghai Magnetic Material, 2009-2014
Revenue Structure of Zhenghai Magnetic Material (by Region), 2010-2013
NdFeB Revenue and Gross Margin of Zhenghai Magnetic Material, 2010-2014
NdFeB Output and Sales Volume of Zhenghai Magnetic Material, 2012-2013
NdFeB Revenue Structure of Zhenghai Magnetic Material (by Type), 2014
NdFeB Consumption Structure of Zhenghai Magnetic Material, 2013
R & D Investment of Zhenghai Magnetic Material, 2011-2013
Number of Employees of Ningbo Yunsheng, 2007-2013
Revenue and Net Income of Ningbo Yunsheng, 2008-2014
Revenue Structure of Ningbo Yunsheng (by Product), 2012-2014
Revenue Structure of Ningbo Yunsheng (by Region), 2010-2014
NdFeB Revenue and Gross Margin of Ningbo Yunsheng, 2009-2014

NdFeB Product Cost Structure of Ningbo Yunsheng, 2012-2013
NdFeB Product Consumption Structure of Ningbo Yunsheng, 2013
Revenue of Major NdFeB Subsidiaries of Ningbo Yunsheng, 2014
Revenue and Net Income of AT & M, 2009-2014
Revenue Structure of AT & M (by Product), 2013-2014
Revenue of AT & M (by Region), 2010-2014
Main Economic Indicators of Shenzhen Highmag Magnet, 2013-2014
Number of Employees of Baotou Steel Rare-earth, 2009-2013
Revenue and Net Income of Baotou Steel Rare-earth, 2008-2014
Eliminated Subsidiaries of Baotou Steel Rare-earth, 2014
Revenue Structure of Baotou Steel Rare-earth (by Product), 2012-2013
Revenue Structure of Baotou Steel Rare-earth (by Region), 2008-2014
Gross Margin of Baotou Steel Rare-earth (by Product), 2008-2014
NdFeB Revenue and Gross Margin of Baotou Steel Rare-earth, 2008-2014
Main Economic Indicators of Baotou Steel Rare-earth, 2012-2014
Equity Structure of Xiamen Tungsten
Revenue and Net Income of Xiamen Tungsten, 2008-2014
Revenue Structure of Xiamen Tungsten (by Product), 2012-2013
Revenue Structure of Xiamen Tungsten (by Region), 2009-2013
Main Economic Indicators of Changting Golden Dragon Rare Earth Co., Ltd., 2010-2013
Number of Employees of Taiyuan Twin Tower Aluminum Oxide, 2008-2013
Revenue and Net Income of Taiyuan Twin Tower Aluminum Oxide, 2008-2014
Revenue Structure of Taiyuan Twin Tower Aluminum Oxide (by Product), 2013-2014
Revenue Structure of Taiyuan Twin Tower Aluminum Oxide (by Region), 2008-2014
Gross Margin of Taiyuan Twin Tower Aluminum Oxide (by Product), 2008-2014
NdFeB Cost Structure of Taiyuan Twin Tower Aluminum Oxide, 2013
NdFeB Revenue and Growth Rate of Taiyuan Twin Tower Aluminum Oxide, 2008-2014
Main Economic Indicators of Zhejiang Innuovo Magnetics, 2012-2014
Main Economic Indicators of Shanxi Innuovo Magnetics, 2012-2013
Revenue and Net Income of Sinosteel Anhui Tianyuan Technology, 2008-2014
Revenue Structure of Sinosteel Anhui Tianyuan Technology (by Product), 2013-2014
Revenue Structure of Sinosteel Anhui Tianyuan Technology (by Region), 2009-2014
Number of Employees of Rising Nonferrous Metals, 2009-2013
Sales of Rising Nonferrous Metals from Major Customers, 2012-2013
Revenue and Net Income of Rising Nonferrous Metals, 2009-2014
Revenue Structure of Rising Nonferrous Metals (by Product), 2013-2014
Revenue Structure of Rising Nonferrous Metals (by Region), 2013-2014
Gross Margin of Rising Nonferrous Metals (by Product), 2009-2014
Main Economic Indicators of Guangdong Guangsheng Nonferrous Metals Imp. & Exp.

Co., Ltd., 2012-2014

Main Economic Indicators of Guangsheng Zhiwei Rare Earth New Materials Co., Ltd., 2012-2014

Number of Employees of Broad-Ocean Motor, 2009-2013

Revenue and Net Income of Broad-Ocean Motor, 2009-2014

Revenue Structure of Broad-Ocean Motor (by Product), 2013-2014

Revenue Structure of Broad-Ocean Motor (by Region), 2009-2014

Gross Margin of Broad-Ocean Motor (by Product), 2009-2014

Main Economic Indicators of Ningbo Co-star Material Technology Co., Ltd., 2012-2014

Revenue and Net Income of Galaxy Magnets, 2008-2014

Revenue Structure of Galaxy Magnets (by Product), 2012-2013

Revenue Structure of Galaxy Magnets (by Region), 2011-2014

NdFeB Revenue and Growth Rate of Galaxy Magnets, 2009-2014

NdFeB Revenue Structure of Galaxy Magnets (by Product), 2013-2014

Main R & D Projects of Galaxy Magnets, 2014

Global and Chinese NdFeB Output Growth Rate, 2009-2018E

Global and Chinese High-performance NdFeB Output Growth Rate, 2009-2014

Revenue Growth Rate of Major Global NdFeB Manufacturers, 2009-2014

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