

Global and China Permanent Magnet Industry Report, 2012

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Abstracts

Global and China Permanent Magnet Industry Report, 2012 of ResearchInChina chiefly covers the followings:

Overview of the rare earth industry

The market of ferrite permanent magnet

The industry of NdFeB magnet

Market analysis of NdFeB magnet

The study of 13 main permanent magnet enterprises

Permanent magnet is mainly divided into two categories, that is, ferrite and rare earth magnet. Rare earth magnet mainly includes NdFeB. Due to the acute fluctuation of rare earth prices in 2011, NdFeB price correspondingly experienced wide fluctuations. The average price of NdFeB was RMB 106 / kg in January 2011, then rose sharply to RMB 615 / kg in July, but slumped to RMB 215 / kg in December. The average price in the third quarter of 2012 was RMB 173 / kg.

In 2011, some NdFeB-applied products exited the market due to drastic volatility of rare earth prices. Taking nuclear magnetic resonance imaging equipment as an example, the unit price of equipment is about RMB 3-4 million, but with the skyrocketing of the rare earth prices by 7-8 times, the material costs increased from originally RMB 1 million to above RMB 2 million, correspondingly, manufacturers have to replace NdFeB with

superconductor.

Same happens to wind power generation equipment. When the cost of material increased from RMB 600,000~700,000 / ton to RMB 1.5 million / ton, wind power generation equipment manufacturers have to abandon the excellent NdFeB, and pick up the old method of transforming electricity to magnet. Once quitted, it is very difficult for NdFeB to get into the market again, because a product has a certain life cycle, and changing design is not easy.

The price hike in 2011 made downstream enterprises purchase part of NdFeB in advance. In 2012, the NdFeB industry is meeting with unprecedented dilemma. What is worse, nearly the whole downstream market of NdFeB is on the decline, especially wind power. As the world's largest wind power country, China has seen its newly-added installed capacity drop by 10% in 2012.

The market prospects of HDD and ODD, which are the most important application fields of bonded NdFeB, look gloomy. Popular electronic products, such as tablet PC which is gradually occupying traditional PC market, don't use HDD and ODD. Traditional PC is HDD and ODD's main market, and the market may decline continually.

HDD shipment was about 620.652 million in 2011, but was only 442.32 million in the first three quarters of 2012, and is predicted to be only 582.31 million in 2012, down 6.2% year-on-year. The HDD shipment is estimated to decline to 536.82 million in 2015, down 14% compared with 2011. The ODD shipment was about 495 million in 2011, and it is expected to decline to 425 million in 2015.

Other areas, such as frequency conversion air conditioner, e-bike and loudspeaker, are facing decline too. These areas are more sensitive to price, ferrite is competent in these areas too, and the cost is much lower.

But NdFeB is applied widely in automobile market, especially EPS. It is estimated global EPS motor shipment will reach 33.9 million in 2012, and run up to 42.6 million in 2014, up 25.7%. The application scope of EPS is stretching from high-end to low-end vehicles, so the market prospect is very good. But most EPS motors are produced by Japanese companies, who will purchase local magnet with priority.

The high price of NdFeB in 2011 propelled numerous Chinese companies involve in this industry. About 90% NdFeB magnet was produced in China in 2012. The production capacity of Tianjin, Shanxi, Zhejiang, and Baotou had exceeded 300,000 tons in mid

2012, while the actual demand was less than 100,000 tons, so the production capacity was seriously excessive. Although some people believe that high-end NdFeB production capacity is not surplus, the most important application market of high-end NdFeB is HDD and ODD, whose market prospects don't look good in the long run.

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