

ASEAN Nickel Resource Industry Research Report 2026-2030

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Abstracts

Nickel is an important strategic metal resource and a crucial basic material for modern industry, new energy industry, and defense industry.

With the global energy transition, the rapid development of the electric vehicle industry, and the continued growth in demand for stainless steel and high-temperature alloys, nickel has become a critical global mineral resource.

The nickel resource industry chain primarily comprises five stages: resource exploration and mining, ore beneficiation, smelting and processing, refined product manufacturing, and end-use applications.

ASEAN is a major regional cooperation organization in Southeast Asia, established in 1967. It currently encompasses the region's key economies and stands as one of the world's emerging regions characterized by a large population and rapid economic growth.

According to CRI's analysis, the stainless steel industry remains the primary driver of nickel demand in ASEAN, accounting for approximately 60% to 70% of the region's nickel consumption. The demand for new energy battery materials is increasing rapidly, accounting for about 20% of the market, and is expected to continue to rise in the coming years.

ASEAN is the world's most important region for nickel supply, with Indonesia and the Philippines forming the core of global laterite nickel ore supply.

According to CRI's analysis, as competition in the global new energy vehicle industry

has intensified in recent years, international mining companies, battery manufacturers, and automakers have increasingly stepped up strategic investments in nickel resources within ASEAN.

CRI predicts that competition in the ASEAN nickel industry will further extend towards supply chain integration, with closer collaborative development among mining, smelting and processing, battery materials, power batteries, and new energy vehicle manufacturing.

CRI recommends that global mineral miner, nickel smelter, mineral resource investor, private equity (PE) funds and venture capital (VC) firms conduct timely market research on the ASEAN region to prepare for their strategic entry into the ASEAN Nickel market.

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