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World Magnets

Industry Study with Forecasts for **2019 & 2024**

Study #3328 | October 2015 | \$6300 | 349 pages

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Gains will be driven by increases in durable goods output as economies improve, by rising applications for magnets overall, and by the end of magnet raw material controls by the Chinese government.

World demand to rise 7.3% annually through 2019

Global demand for permanent magnets is forecast to climb 7.3 percent annually through 2019 to \$16.2 billion. In volume terms, world magnet sales will expand 4.6 percent per year to 1.2 million metric tons. Gains will be driven by increases in durable goods output as economic conditions improve and the overall number of applications for magnets rises. The elimination of rare earth export quotas and taxes by the Chinese government in 2015 will also support growth by helping to ensure that adequate raw material supplies are available on a global basis and by further easing pricing pressures following a period during which neodymium and samarium cobalt magnet costs unexpectedly spiked.

Magnet sales to grow fastest in developing areas

The Asia/Pacific region accounts for over two-thirds of world magnet demand in value terms. China is the largest national market by a substantial margin, due in part to the huge size of its electronics industry. In a continuation of a long term trend, magnet sales growth in the Africa/Mideast region, developing parts of Asia, Eastern Europe, and Central and South America will outpace demand in Japan, South Korea, the US, and Western Europe through 2019. China alone will account for half of all additional magnet sales worldwide.

World Magnet Demand, 2019 (\$16.2 billion)



Neodymium magnets to offer best opportunities

Ferrite and neodymium are the two most important magnet types commercially. Neodymium, the strongest type currently available, dominates dollar sales, while ferrite magnets, the least expensive on a per kilogram basis, account for the largest share of demand in metric tons. Neodymium magnets are expected to post the fastest market gains in value terms of any product type through 2019, driven by the superior performance they can provide. In large markets such as electronics and motor vehicles, ongoing efforts to minimize product size and/or weight while adding new features will also contribute to demand increases.

Automotive market to grow the fastest

Electronics is the largest market for magnets, followed by industrial and automotive applications. In China and a number of other Asian countries the electronics market dominates magnet demand. However, automotive-related magnet demand will grow the fastest worldwide through 2019, spurred by increases in motor vehicle output and the number of magnet-using devices in the average vehicle. Expanding production of full and plug-in hybrids and electric vehicles, which utilize more magnetic materials than conventional vehicles, will also support market gains.

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Sample Text, Table & Chart

WESTERN EUROPE

Germany: Magnet Supply & Demand

Demand for magnets in Germany was \$540 million in 2014, making it more than three times the size of the next largest West European market and the fourth largest national market in the world behind Japan, and the US. Product sales in volume terms totaled 190,000 metric tons in that year. The German market for magnetic materials grew at a modest 2.0 percent annual pace between 2004 and 2009 in volume terms, while volume demand fell, negatively affected by declines in automotive and motor vehicle output during the 2009 global economic recession. However, production of these and other durable goods has rebounded since then, and magnet sales in the country more than doubled in volume terms between 2009 and 2014, outperforming the region as a whole.

Germany's magnet shipments totaled \$360 million in 2014, representing 45 percent of all West European output. Neodymium magnets account for the largest share of industry production, although ferrite, samarium cobalt, and hybrid ferrite/neodymium magnets are also manufactured locally. After declining during the 2004-2009 period, the nation's magnet output rose at a double-digit annual rate between 2009 and 2014, supported in part by industry investment activity. For example, in November 2013 Kolektor Magnet Technology opened a new magnet manufacturing facility in Essen. However, imports climbed at an even faster pace during this span, and in 2014 Germany had a trade deficit equivalent to one-third of the domestic market total. China is by far the largest external source of magnet supply. Other sizable foreign suppliers include Japan, South Korea, Switzerland, and the Czech Republic.

Several new magnet facilities in Germany are forecast to come on line, which will help to curb the decline in magnet production. Investment in magnet production is expected to rise to \$1.1 billion in 2019, moderating the decline in magnet production. The magnet industry output in the West European region is expected to be fueled by generally favorable economic conditions.

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SAMPLE
TEXT

TABLE VI-4

CHINA: MAGNET DEMAND BY PRODUCT & MARKET
(million dollars)

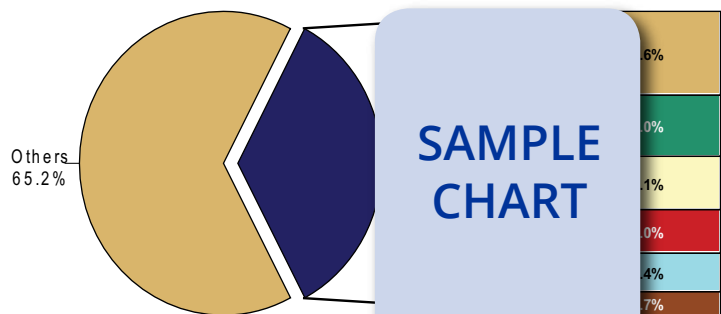
Item	2004	2009	2014	2019	2024
Magnet Demand (000 metric tons) \$/kilogram					
Magnet Demand By Product:					
Neodymium					
Ferrite					
Samarium Cobalt					
Alnico & Other					
By Market:					
Electronics					
Industrial					
Automotive					
Other					
Electric Bicycles & Motorcycles					
All Other					
% China					
Asia/Pacific Magnet Demand					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD MAGNET MARKET SHARE, 2014
(\$11.4 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Magnum Magnetics Corporation

801 Masonic Park Road
 Marietta, OH
 740-373-7770
<http://www.m>

Annual Sales:
 Employment:

Key Products

Magnum Magnetics is a manufacturer of flexible ferrite permanent magnets in sheet, strip, extruded profile, and other forms. The Company is privately held.

The Company's flexible ferrite permanent magnets are produced under a range of brand names for use in printing, signage, and other applications. Among the Company's flexible ferrite permanent magnet sheet products are DIGIMAXX, DIGIMAG, MESSAGEMAG, MUSCLEMAG, LABELMAG, and NATUREMAG offerings. DIGIMAXX super-wide printable magnetic sheet is designed for use on wide-format printing presses. The DIGIMAG portfolio includes printable magnetic sheet, DIGIMAG PAPER inkjet printable magnetic sheet, DIGIMAG PLUS printable magnetic sheet for digital presses, DIGIMAG PLUS 2 printable magnetic sheet for digital and offset presses, and DIGIMAG XTRA premium printable magnetic sheet for digital presses.

Magnum Magnetics' MESSAGEMAG thin magnetic sheeting is a high-performance, customizable product for use in offset and flexographic printing applications. MUSCLEMAG high-energy magnetic sheeting is intended for usage in producing automotive signs, while

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SAMPLE PROFILE

TABLE VII-5

RUSSIA: MAGNET SUPPLY & DEMAND
 (million dollars)

Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013\$)					
% durable goods MVA					
Durable Goods Mfg Value Added (bil 2013\$)					
Electric Motor Shipments (mil \$)					
Motor Vehicle Production (000 units)					
Electronic Equipment MVA (bil 2013\$)					
\$ magnets/000\$ durable goods					
\$ magnets/000\$ electric motors					
Magnet Demand					
net exports					
Magnet Shipments					
% Russia					
Eastern Europe Magnet Shipments					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

STUDY COVERAGE

World Magnets is a Freedonia industry study that presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by product and market, in six regions and 19 countries. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 41 global industry players.

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Related Studies

World Rare Earths

Global demand for rare earths is forecast to increase 3.5 percent per year to 149,500 metric tons in 2019, valued at \$4.5 billion. Battery alloys, permanent magnets, and autocatalysts will be the fastest growing end use markets. China will remain the dominant geographic market, while India will grow the fastest. This study analyzes the 125,900 metric ton world rare earths industry, with forecasts for 2019 and 2024 by product and market for six world regions and 13 major countries. The study also evaluates company market share and profiles industry players.

#3349..... November 2015.....\$6300

World Gears

Worldwide demand for gears will grow 6.0 percent per annum through 2019 to \$221 billion. Gear demand will expand the fastest in China and other industrializing nations, where the production of motor vehicles, motorcycles, and other durable goods will be the strongest. More use of higher tech gears will boost value gains. This study analyzes the \$165 billion world gear industry, with forecasts for 2019 and 2024 by product and market for six world regions and 19 major countries. The study also evaluates company market share and profiles industry participants.

#3320..... October 2015.....\$6300

Insulated Wire & Cable

US insulated wire and cable demand will rise 6.0 percent annually to \$27 billion in 2019. Building wire and cable will remain the largest product segment and will be by far the fastest growing, followed by magnet and power wire and cable. Construction will be the fastest growing market, surpassing electrical equipment to become the largest segment. This study analyzes the \$20.3 billion US insulated wire and cable industry, with forecasts for 2019 and 2024 by material, product, and market. The study also evaluates company market share and profiles industry players.

#3260..... May 2015.....\$5300

World Material Handling Products

Global material handling product demand will rise 5.0 percent annually through 2018 to \$142 billion. India and China will grow the fastest as material handling products supply growing manufacturing and distribution activity. Automated storage and retrieval systems and automated guided vehicles will grow the fastest. This study analyzes the \$111 billion world material handling product industry, with forecasts for 2018 and 2023 by product, market, world region, and for 29 countries. This study also evaluates company market share and profiles industry participants.

#3196..... September 2014.....\$6400

World Hybrid & Electric Vehicles

World hybrid and electric vehicle (H/EV) sales will more than double through 2018, accounting for nearly one-quarter of all new motor vehicles sold. Gains will be led by micro and mild hybrids, which are conventional vehicles equipped with relatively low-cost systems (e.g., start-stop, regenerative braking) that reduce fuel use and vehicle emissions. This study analyzes the 10.1 million unit world H/EV industry, with forecasts for 2018 and 2023 by type, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry players.

#3155..... June 2014.....\$6100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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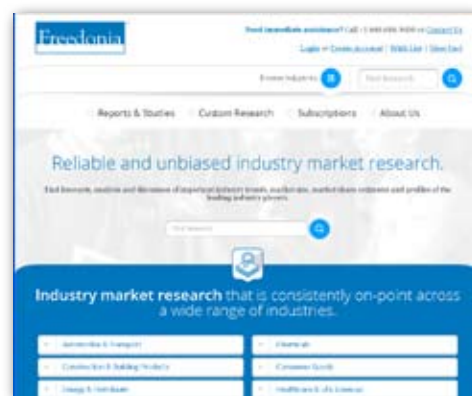
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