

# China Li-ion Battery & Its Raw Materials Market Report, 2008-2009

Feb. 2009



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## **2 Global Pattern of Li-ion Battery Industry**

### **2.1 Global Scale**

In 2002-2008, the global yield of Li-ion battery has kept growth, but the growth rate of production has been stable. In the year of 2008, the global market scale of Li-ion battery reached more than 3.5 billion units. China, Japan and South Korea are as important as one another.

*Market Scale and Growth of Li-ion Battery in the World, 2002-2008*

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Source: ResearchInChina

*Global Li-ion Battery Market Scale Forecast, 2009-2010(USD mln)*

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Source: Founder Securities

Liquid Li-ion Battery output still takes dominating position. Because of the influence of security incidents, the industry has presented the development tendency of polymer battery.

The major enterprises in the R&D of Lithium-ion polymer (LiP) battery are mainly concentrated in Japan (Sanyo, Sony and Toshiba), South Korea (Samsung and SaehanEnertech), the US (Valence), and China (BYD and Tianjin Lishen Battery). Lithium-ion polymer battery is mainly applied in small-power field.

#### 4.2.1 BYD Company Limited

Company	BYD Company Limited
Establishment Date	Feb. 1995
Headquarter	No.3001, Hengping Road, Pingshan, Longgang, Shenzhen, 518118, P.R.China
Main Products	Rechargeable battery (Li-ion battery, Nickel-cadmium battery, Nickel-hydrogen battery), LCD module, keyboard, flexible PCB, camera, charger, automotive molds and auto parts etc.
The Number of Employees	130,000

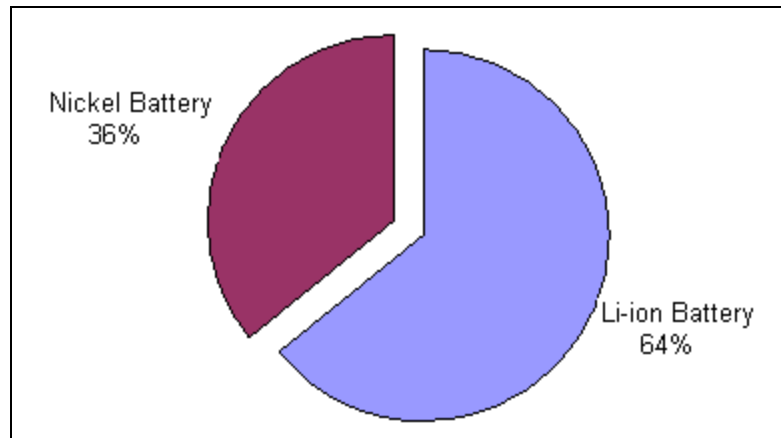
Source: ResearchInChina

In 2008, the sales of BYD's rechargeable battery and related business dropped by 13% year on year to RMB6.208 billion, of which revenue generated by Li-ion battery business remained nearly the same with that of previous year to RMB3.937 billion.

Owing to a much closer strategically cooperative relationship with global leading mobile phone vendors during 2008, the BYD still made a great achievement in Li-ion battery business in the first three quarters of that year. In the fourth quarter, however, its Li-ion battery business saw a sharp decline as global mobile phone demand slowed down and mobile phone vendors reduced their inventory. At present, it makes great efforts to explore new business areas and has gradually started development and application of laptop computer battery, network power and solar cell.

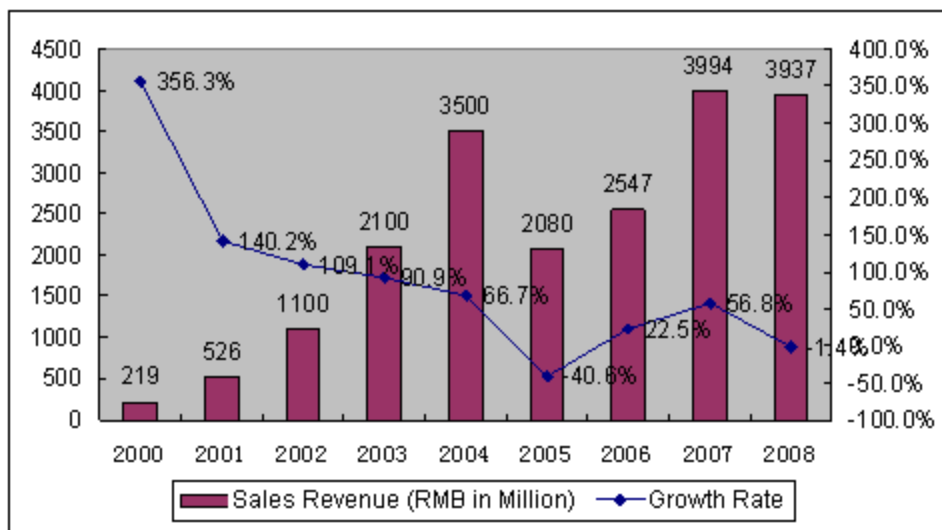
The group's goal is to continue a steady growth against the market environments full of challenges, further increase battery product application portfolio, expand new businesses and strengthen cost control.

Battery Revenue Structure of BYD, 2008



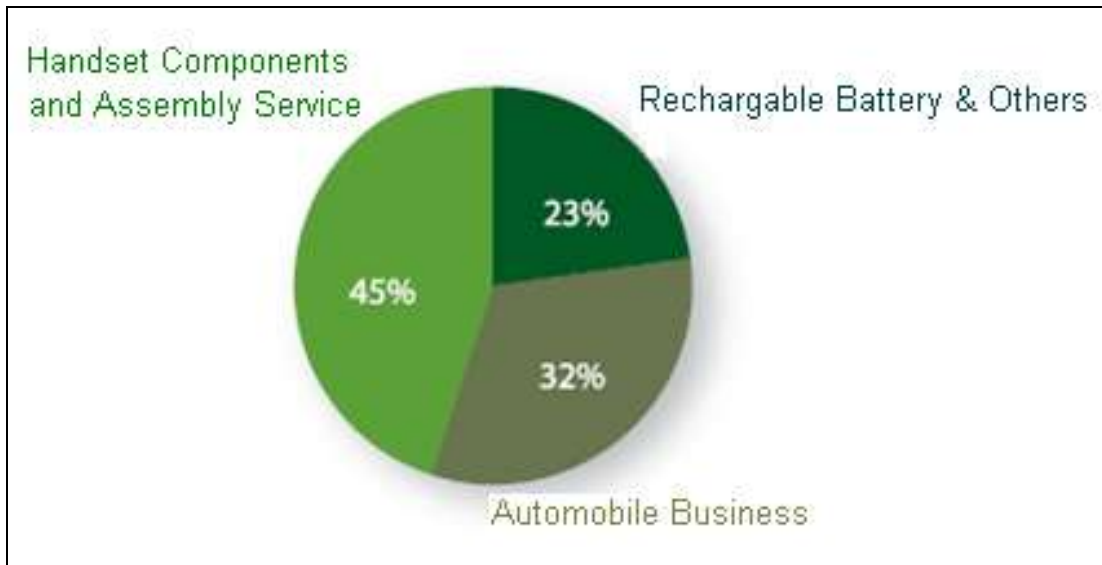
Source: ResearchInChina

Sales Revenue of BYD from Li-ion Battery, 2002-2008



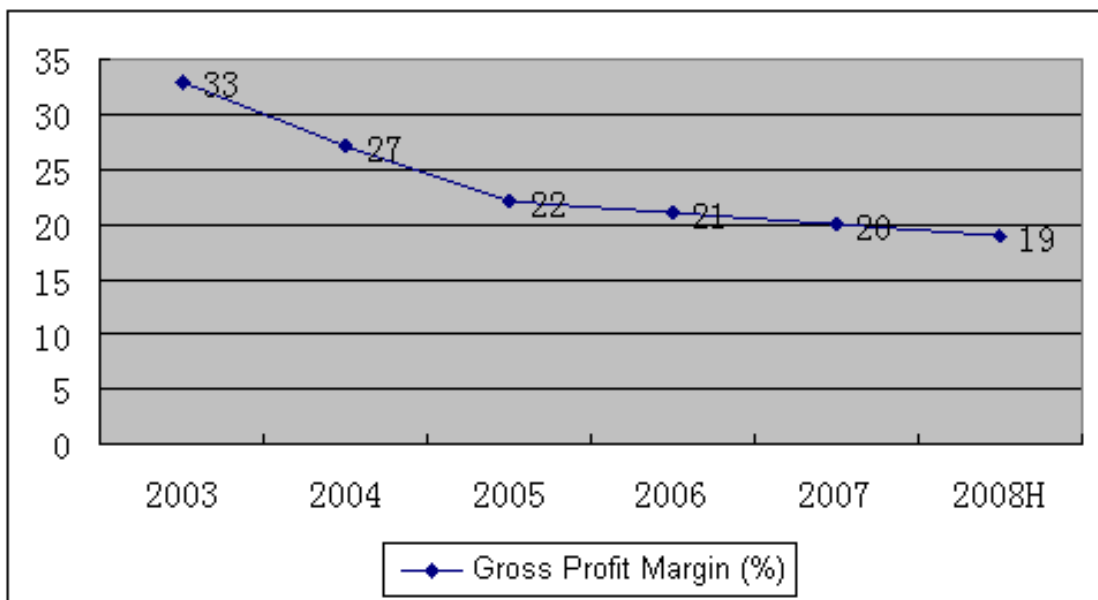
Source: ResearchInChina

*Operating Revenue Structure of BYD, 2008*



Source: BYD

*Sales Gross Profit Margin of BYD, 2003-2008 (Including Automobile and Other Businesses)*



Source: BYD

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