

Global and China Electric Vehicle Li-ion Battery Industry Report, 2008-2009



Hybrid Electric Vehicle is the development trend of automobile industry, to which the auto Li-ion-power battery is the key. HEV battery can be supplied by third-party manufacturers, but electrical control system and power transmission system can not depend on the third party. At present, only Toyota can produce high-class HEV relying on such advanced technologies as CVT technology.

Except Toyota Prius, the other HEV are mild hybrids, whose engines displacement is no more than 1.1 liters, most ordinary in China. Its oil-saving efficiency is only 15%; in contrast, Toyota Prius' can reach 40%.

It is predicted that the HEV can reach 6 million sets till 2020. However, China HEV market is backward due to its high price. Since Toyota Prius launched into Chinese market in Jan 2006, just 2,500 sets sold out in two years, and only 558 sets sold in 2008. Up to Jan 2009, Toyota HEV sales have exceeded 1.7 million sets around the globe, of which more than a half sold in the USA. According to Honda's report, its sales in the USA hit 32, 575 sets in 2008.

Shareholding Ratio of World's Key Vehicle Power Battery Companies

Battery Company	Shareholding Ratio
Panasonic EV Energy(PEVE)	Toyota 60% Panasonic 40%
AESC	Nissan Motors 51%, NEC Co. 42% , NEC-Tokin7%
Lithium Energy Japan	GS Yuasa 51%, Mitsubishi 34%, Mitsubishi Motors 15%
LG Chem.	LG Holdings 30.1%
Hitachi Vehicle Energy	Hitachi 64.9%, Hitachi Maxell 10%
Johnson Controls-Saft Advanced Power Solutions	Cont. 51% , Saft 49%
BYD	MidAmerican Energy 39.6%
EnerDel	Ener1, 100%
SB Limotive	Samsung SDI 50%, BOSCH 50%
Blue Energy	GS-YUASA 51%, HONDA 49%

Global HEV to be launched during 2010-2015

Automaker	Battery type	Model	Type	Forecasted launch date
Toyota	Li-ion	Mini Van	HEV	2010
		Lexus600h	HEV	2012
		Prius III	HEV	2013
		Sedan	PHEV	2009
		n/a	BEV	2013
Hino	NiMH		HEV	
Ford	Li-ion	Escape	HEV	2012
		Edge(SUV)	HEV	2012
		Fusion	HEV	2013
Mercury(Ford)		Mariner(SUV)	HEV	2012
		Milan	HEV	2013
Lincoln		MKZ	HEV	2013
Volkswagen	Li-ion	Touareg(SUV)	HEV	2011
		Golf Touran	HEV	2012
Porsche		Cayenne	HEV	2011
Audi		A7	HEV	2011
Tesla	Li-ion	Roadstar	PHEV	2011
		Sedan		2011
Daimler	Li-ion	Smart ED	PHEV	2011
Honda	NiMH	Civic	HEV	2010
Nissan	Li-ion	Sedan(FR)	HEV	2010
	(NCM Type)	X-Trail(SUV)	HEV	2012
		Sedan	HEV	2012
		n/a	HEV	2015
		Sedan	PHEV	2015
		Compact Sedan	BEV	2010
		n/a	BEV	2015

Table of Contents

- **1. Global Automobile Market**
 - 1.1 Global Automobile Market
 - 1.2 Status Quo of Key Automobile Markets in 2008
 - 1.2.1 USA
 - 1.2.2 Germany
 - 1.2.3 Japan
 - 1.2.4 UK
 - 1.2.5 Italy
 - 1.2.6 Korea
 - 1.2.7 France
 - 1.2.8 Brazil
 - 1.2.9 Spain
 - 1.2.10 Russia
- **2. Global Automobile Industry**
 - 2.1 Rank of Global Automakers
 - 2.2 Global Automobile Industry by Region
 - 2.2.1 Europe
 - 2.2.2 Japan & Korea
 - 2.2.3 EMEA
 - 2.2.4 North America
 - 2.2.5 Latin America
- **3. China Automobile Market**
 - 3.1 Overview
 - 3.2 Passenger Car Market Structure
 - 3.3 Passenger Car Emissions
 - 3.4 Commercial Vehicle
- **4. China Automobile Industry**
 - 4.1 Sales of Key Automakers in China in 2008
 - 4.2 Output and Forecast of Key Automakers in China, 2008-2015E
 - 4.3 Financial Results of Key Automakers in China
- **5. Li-ion battery Industry and Market**
 - 5.1 Brief Introduction
 - 5.2 Li-ion Battery Market
 - 5.3 Li-ion Battery Upstream Sector
 - 5.4 Supply & Demand of Li-ion Battery Resources

- 5.5 Status Quo of Li-ion Battery Industry
- **6. Introduction of HEV by Taking Toyota Prius as an Example**
- 6.1 Combination Ways of Hybrid Electric System
- 6.2 Working Analysis
- 6.3 Prius Electric System
- 6.3.1 Motor System
- 6.3.2 Motor Control System
- 6.3.3 Battery System
- 6.3.4 Power Transmission System
- **7. Status Quo & Prospect of HEV**
- 7.1 Brief Introduction
- 7.2 Mild Hybrids
- 7.2.1 Composition
- 7.2.2 Functions
- 7.2.3 Control Strategy
- 7.2.4 Typical Models
- 7.3 PHEV
- 7.4 Plug-in Hybrid
- 7.4.1 Demand for Plug-in Hybrid
- 7.4.2 Working State of PHEV
- 7.5 Comparison of Mild Hybrids and PHEV
- 7.6 Status Quo & Prospect of HEV Market
- 7.6.1 Status Quo
- 7.6.2 US HEV Market
- 7.6.3 Prospect
- 7.6.4 Market Forecast
- 7.6.5 Forecast of China HEV Market
- 7.7 Carbons Dioxide Emissions and Subsidies of Governments to HEV
- 7.7.1 Kyoto Protocol
- 7.7.2 Carbons Dioxide Emissions of Autos
- 7.7.3 Subsidy of Japan to HEV
- 7.7.4 Subsidy of EU to HEV
- 7.7.5 Subsidy of USA to HEV
- 7.8 Subsidy of China to HEV
- 7.9 China HEV Industry Policies
- 7.10 Status Quo of China HEV Industry
- 7.10.1 China's HEV in May 2009 Shanghai Auto Show
- **8. Status Quo & Prospect of HEV Power Battery**
- 8.1 Demand on Power Battery
- 8.2 Classification and Comparison
- 8.2.1 Storage Battery

- 8.2.2 Fuel cell
- 8.2.3 Ni-MH battery
- 8.3 Li-ion Power Battery
 - 8.3.1 Key Anode Materials
 - 8.3.2 Lithium Iron Phosphate
 - 8.3.3 Lithium Iron Phosphate Battery
 - 8.3.4 Introduction of Lithium Iron Phosphate Battery Materials Industry
- 8.4 Cooperation between Li-ion Power Battery Companies and Auto Makers
- 8.5 Supply & Demand of Li-ion Power Battery
- 8.6 Charging Station

- **9. Auto Power Battery Companies**
 - 9.1 SB LIMOTIVE
 - 9.2 BYD
 - 9.3 A123 SYSTEMS
 - 9.4 JCS
 - 9.5 ASEC
 - 9.6 PEVE
 - 9.7 COBASYS
 - 9.8 VARTA
 - 9.9 LITHIUM ENERGY JAPAN
 - 9.10 BLUE ENERGY
 - 9.11 SANYO Energy
 - 9.12 Hitachi Vehicle Energy
 - 9.13 DEUTSCHE ACCUMOTIVE
 - 9.14 ENERDEL
 - 9.15 GAIA
 - 9.16 LGChem

Selected Charts

- Global Demand for Light Vehicles by Region, 2006-2015E
- Global Auto Sales by Region, 2007-2010E
- Auto Output in North America, 2008-2015E
- Auto Output in Latin America, 2008-2015E
- Auto Sales in China, 1998-2008
- Sales of Passenger Car by Model in China, 2005-Feb 2009
- Sales Growth Rates of Passenger Car Models in China, 2005-Feb 2009
- Sales of Passenger Car by Emission in China, 2004-Feb 2009
- Growth Rate of Passenger Car by Emission in China, 2004-Feb 2009
- Sales of Truck by Load in China, 2005-Feb 2009
- Sales of Heavy-duty Truck in China, 2005-Feb 2009
- Sales of Passenger Car by Load in China, 2005-Feb 2009
- Gross Profit Margin & Pre-tax Profit Margin of China Auto Makers, 1999-Feb 2009
- Gross Profit Margin & Pre-tax Profit Margin of China Auto Parts Companies, 1999-Feb 2009
- Growth Rates of Operating Revenue & Profit of China Auto Makers, 1999-Feb 2009
- Growth Rates of Operating Revenue & Profit of China Auto Parts Companies, 1999-Feb 2009
- Three Expenses of China Automakers, 2003-Feb 2009
- Three Expenses of China Auto Makers, 1999-Feb 2009
- Three Expenses of China Auto Parts Companies, 1999-Feb 2009

- Battery Classification System
- Working Principle of Li-ion Battery
- Properties of Lead-acid, Ni-Cd, Ni-Mn, Li-ion and Li-ion Polymer Rechargeable Battery
- Inner Framework of Cylindrical Li-ion Battery
- Inner Framework of Square Li-ion Battery
- Inner Framework of Li-ion Polymer Battery
- Production Flow of Cylindrical Li-ion Battery
- Global Demand for Rechargeable Battery by Technology, 2003-2018E
- Downstream Demand of Li-ion Battery, 2007Q1-2009Q4E
- Layout of Downstream Demand for Li-ion Battery, 2003-2018E
- Li-ion Battery Value Chain
- Global Distribution of EVAN Lithium Ore Resources
- Global Distribution of THAIL Lithium Ore Resources
- Global Reserves of THAIL Lithium Ore Resources
- Global Distribution of Lithium Ore Resources
- Global Lithium Supply & Demand, 2002-2020E
- Global Lithium Terminal Consumption, 2002-2020E
- Global Lithium Supply & Demand Gap, 2007-2020E
- Global Chemical Lithium Supply & Demand, 2002-2020E
- Production Capacity of Global Key Li-ion Battery Producers, 2002-2007
- Operating Profit Margin of World's Top Five Li-ion Battery Producers, 2007-2010E
- Market Share of World's Top Five Li-ion Battery Producers, 2008
- SHEV System

- PHEV System
- Series-parallel HEV System
- Global HEV Shipment, 2008-2020E
- Global HEV Distribution by Region, 2008, 2010' 2015 E and 2020E
- Carbon Dioxide Emissions Per Kilometer Of Various Types Of Vehicles
- Global Li-ion Battery Cathode Material Suppliers and Their Supply Proportions
- Forecast of HEV Demand for Li-ion Battery, 2009-2017
- Smart Grid Structure
- Vehicle Grid Infrastructure Diagram
- Distribution of US Charging Station, April 2009
- Revenue and Operating Profit Margin of Samsung SDI, 2005-2011E
- Revenue and Sales of Samsung SDI Battery Division, 2007Q1-2009Q1
- Revenue and Gross Profit Margin of BYD, 2004-2008
- Product Structure of BYD, 2007-2008
- BYD Revenue by Region, 2007-2008
- Global Presence of A123
- Battery Examples of A123
- SAFT Revenue and EBITDA, 2004-2008
- SAFT Revenue by Product, 2008
- PEVE Product Application Examples
- Sales of Global Top 14 Automakers, 2007-2008
- Output Statistics and Forecast of All European Automakers, 2008-2015E
- Output Statistics and Forecast of All Japanese and Korean Automakers, 2008-2015E

- Output Statistics and Forecast of All EMEA Automakers, 2008-2015E
- Sales Growth Rate of Various Types of Commercial Vehicle in China, 2005-Feb 2009
- Sales of China's Key Automakers, 2008
- Output Statistics and Forecast of China's Key Automakers, 2008-2015E
- Lithium Carbonate Output of Key Mines in the World, 2006-2010E
- Reserves of Global key Lithium-rich Salt Lake
- Reserves of Global Lithium Mines
- Global Distribution of Lithium Carbonate Production Capacity
- Production Capacity of Global Top Five Li-ion Battery Producers, 2008Q1-2010Q4
- Sales Value of Global Key Li-ion battery Producers, 2005-2008
- Comparison of Series, Parallel and Series-parallel System
- Rank of US HEV Sales and the Total Sales, 2008
- Subsidy Standard for China's Public Passenger Car and Light Commercial Vehicle
- Subsidy Standard for City Bus (above 10 meters)
- Participants of National 863 Plan
- Material Structure of Global Li-ion Power Battery Suppliers
- Performance Comparison of Various Anode Materials for Li-ion Battery
- Demand of Global HEV and PHEV Manufacturers for Li-ion Battery, 2007-2017E
- Operating Profit margin and Gross Profit Margin of Samsung SDI. 2007Q4-2009Q1

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