



Global and China Lithium Carbonate Industry Report, 2011-2012

Jul. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China, China Customs and USGS etc .

Abstract

After 2010, lithium carbonate industry gradually recovered from the impact of global financial crisis and entered a new stage of rapid development. Global demand for lithium carbonate reached 135 kilotons in 2011, a YoY rise of 33.5%. Among lithium carbonate products, battery grade lithium carbonate becomes a hot investment product in the industry with the fastest growth rate in demand.

Global Lithium Carbonate Demand, 2006-2012 (Unit: kiloton)



Source: ResearchInChina, < Global and China Lithium Carbonate Industry Report, 2011-2012 >

In 2011, global lithium carbonate supply still remained under the control of three giants SQM, FMC and Chemetall (Rockwood Lithium) in the industry; however, they saw limited growth rate in lithium carbonate output; and there was a supply gap of 11 kilotons in global lithium carbonate market. Under such background, more and more new entrants (dominated by lithium ore enterprises) got involved in lithium carbonate industry. Being advantageous in raw material cost due to abundant lithium ore resources and being optimistic about the development prospect of lithium battery industry in the future as well as relatively low cost superiority in the production of battery-grade lithium carbonate from lithium based on ore extraction, the enterprises started to build lithium carbonate production capacity; and their products were dominated by battery-grade lithium carbonate.

In the same period, Chinese lithium carbonate market also saw robust demand; particularly, the increased demand on lithium battery in China stimulated the ever rising demand for lithium carbonate after the rectification of lead-acid battery industry. Among China's lithium carbonate producers, brine-based lithium extracting enterprises were fatigue to release production capacity under the impact of weather, technology and production halt for overhaul etc. Affected by this, Chinese lithium carbonate market is in tight supply, and the supply gap hit 3 kilotons throughout 2011. The tight supply of lithium carbonate in China is expected to be eased in 2012 under the influence that ore-based lithium extracting enterprises gradually expanded their production capacity; particularly, Zhangjiagang project of Galaxy Resources was gradually put into production.

At present, lithium ores of China's ore-based lithium extracting enterprises are mainly imported from Australia. They are highly dependent on imported ores owing to scarce ore resources. Australian mining enterprises like Talison have started to set foot in lithium carbonate business in recent years, and its ores are mainly supplied to self-owned lithium carbonate producers. In the long term, it will influence the raw material supply of China's ore-based lithium extractors so as to depress China's lithium carbonate output.

Besides the development of global and Chinese lithium carbonate industries, this report also focuses on the development of lithium carbonate businesses in 10 foreign companies like SQM, FMC, Rockwood, WLC Sentient, Simbol, Orocobre, Nordic Mining, Talison Lithium and Galaxy etc. and 13 Chinese counterparts such as Sichuan Tianqi Lithium Industries Inc., Jiangxi Ganfeng Lithium Co., Ltd., CITIC Guoan Group and Tibet Mineral Development Co., Ltd. etc.

As the largest brine-based lithium extracting enterprise in China, CITIC Guoan Group's actual lithium carbonate production capacity has been far below than the designed capacity all the time owing to technical limitation. In 2011, CITIC Guoan Group saw decline in both brine yield and raw ore output affected by the floodwaters in the previous two years; coupled with the production halt for overhaul, its lithium carbonate output increased slightly and continued to maintain about 5 kilotons.

Sichuan Tianqi Lithium Industries Inc. is the biggest ore-based lithium extractor at home. Its lithium carbonate production capacity reached 8 kilotons (up 45.5% YoY) in 2011 as the newly-built lithium carbonate project was completed and put into production. The company's total output and sales volume of lithium carbonate registered 7,957.93 tons and 8,731.62 tons respectively throughout 2011, with the YoY growth rates of 38.7% and 58.1% separately.

As the largest metallic lithium provider in the world, the lithium carbonate business of Jiangxi Ganfeng Lithium Co., Ltd has witnessed rapid development in recent years, with the annual production capacity increasing from 500 tons in 2008 to 3,000 tons in 2011.

1 Overview of lithium carbonate Industry

- 1.1 Definition of Lithium
- 1.2 Applications and Product Types of Lithium Carbonate
- 1.3 Lithium Carbonate Industry Chain
- 1.4 Lithium Carbonate Technologies

2 Development of Global Lithium Carbonate Industry

- 2.1 Distribution of Lithium Resources
- 2.2 Supply
- 2.3 Demand
- 2.4 Market Pattern

3 Development of China Lithium Carbonate Industry

- 3.1 Distribution of Lithium Resources
- 3.2 Production
- 3.3 Demand
 - 3.3.1 Apparent Consumption
 - 3.3.2 Major Growth Points
- 3.4 Industry Development
- 3.5 Production of Manufacturers

4 Import and Export of Lithium Carbonate In China

- 4.1 Import
- 4.2 Export
- 4.3 Import & Export Distribution

5 Casts and Prices of Lithium Carbonate

- 5.1 Coats of Lithium Carbonate
 - 5.5.1 Extraction from Ore
 - 5.5.2 Extraction from Salt Lake Brine
- 5.2 Price Trend of Lithium Carbonate

6 Lithium Battery Industry Development

- 6.1 Status Quo
- 6.2 Lithium Battery Materials
 - 6.2.1 Lithium Cobalt Dioxide
 - 6.2.2 Lithium Manganese Dioxide
 - 6.2.3 Complex Lithium Cobalt Nickel Oxide
 - 6.2.4 Lithium Iron Phosphate
- 6.3 Production Process of Li-ion Battery
 - 6.3.1 Wet Process
 - 6.3.2 One-way Stretching Dry Process
 - 6.3.3 Two-way Stretching Dry Process
- 6.4 Key Li-ion Battery Types
 - 6.4.1 Liquid Electrolyte Lithium-ion Battery
 - 6.4.2 Polymer Lithium-ion Battery
 - 6.4.3 Li-ion Battery in the Future – Lithium Metal Rechargeable Battery
- 6.5 Application of Lithium Battery in New Energy Automobiles
- 6.6 Global Lithium-ion Battery Development Trends

7 Key Enterprises Worldwide

- 7.1 SQM
- 7.2 FMC
- 7.3 Rockwood Lithium
- 7.4 Western Lithium
- 7.5 Talison Lithium
- 7.6 Nordic Mining
- 7.7 Galaxy Resources
- 7.8 Sentient
- 7.9 Orocobre
- 7.10 Simbol mining

8 Key Enterprises In China

- 8.1 CITIC Guoan Information Industry Co., Ltd
- 8.2 Tibet Mineral Development Co., Ltd
- 8.3 Qinghai Salt Lake Industry (Group) Co., Ltd
- 8.4 Western Mining Co., Ltd
- 8.5 Sichuan Tianqi Lithium Industries, Inc.
- 8.6 Foshan Electrical and Lighting Co., Ltd
- 8.7 Sichuan Western Resources Holding Co., Ltd
- 8.8 Jiangxi Ganfeng Lithium Co., Ltd
- 8.9 Others
 - 8.9.1 Xinjiang Lithium Salt Plant
 - 8.9.2 Sichuan N&Co Guorun New Materials Co., Ltd
 - 8.9.3 Sichuan JiXiang Lithium Technology Corporation Limited
 - 8.9.4 ABA Guangsheng Lithium Co., Ltd
 - 8.9.5 Shanghai China Lithium Industrial Co.,Ltd

- 
- Main Applications and Product Types of Lithium Carbonate
 - Product Chain of Lithium Carbonate Industry
 - Characteristics of Lithium Carbonate Manufacturing Process
 - Lithium Carbonate Production Technology Roadmap
 - Proven Lithium Resource Reserves and Distribution Worldwide, 2011
 - Global Lithium Resource Reserves Structure, 2011
 - Lithium-bearing Brine Resources Abroad,2011
 - Lithium Ore Resources Abroad,2011
 - Design Production Capacity and Actual Production Capacity of key Lithium Carbonate Manufacturers worldwide,2011
 - New Production Capacity of Global Lithium Carbonate Industry,2012
 - Global Demand for Lithium Carbonate,2006-2012
 - Demand Structure of Lithium Carbonate Worldwide,2011
 - Competition Patterns of Global lithium carbonate Market, 2011
 - Global Demand of Lithium Carbonate,2006-2012
 - Lithium-bearing Brine Resources in China
 - Lithium Ore Resources in China
 - China's Output of Lithium Carbonate, 2006-2012
 - Apparent Consumption of Lithium Carbonate In China,2006-2012
 - Potential Explosive Growth in Lithium Carbonate Downstream Markets
 - Production Capacity of Key Chinese Lithium Carbonate Manufacturers
 - Output and Apparent Consumption of Lithium Carbonate In China,2006-2011
 - Import of Lithium Carbonate In China, 2006-2012
 - Import Value and Average Price of Lithium Carbonate In China,2008-2012
 - Export of Lithium Carbonate In China, 2006-2012
 - Export Value and Average Price of Lithium Carbonate In China,2008-2012

- 
- Import Distribution of Lithium Carbonate In China,2011
 - Export Distribution of Lithium Carbonate In China,2011
 - Import and Export Volume,Value and Average Price In China,2008-2012
 - Mg/Li of Famous Salt Lake Worldwide
 - Casts of Lithium Carbonate Manufacturers Worldwide,2011
 - purities of the direct products of Extraction from Ore and Extraction from Salt Lake Brine
 - Prices of Industrial Grade and Battery Grade Lithium Carbonate In China, 2007-2012
 - Costs of Carbonate Made by Different Processes, 2011
 - Li-ion Battery Industry Chains
 - Different Production Methods of Lithium Battery
 - Material Selection of Key Lithium Battery Manufacturers Worldwide,2011
 - Performance Comparison of Battery with Various Positive Electrode Materials
 - Production Capacity of Lithium Cobalt Dioxide Manufacturers In China,2011
 - Export of Lithium Cobalt Dioxide In China,2007-2011
 - Production Capacity of Lithium Manganese Dioxide Manufacturers In China, 2011
 - Production Capacity of Lithium Iron Phosphate Manufacturers In China, 2011
 - Output and Output and Ownership of Cars In China, 2006-2012
 - China Petroleum Output & Demand,2000-2011
 - Performance Comparison of Various Battery
 - Development of Chinese Hybrid Car Manufacturers
 - Production Capacity of Lithium Iron Phosphate Manufacturers In China, 2011
 - SQM's Lithium Carbonate Manufacturing Process
 - Production Capacity of Lithium Carbonate of SQM, 2006-2011
 - Sales and Market Share In Global Market of Lithium Carbonate Products of SQM, 2006-2011

- 
- Lithium Carbonate Business Revenue and Growth Rate of SQM, 2006-2011
 - Lithium Carbonate Business Revenue Structure of SQM by Regions, 2006-2011
 - Revenue and Net Profit of FMC, 2007-2011
 - Lithium Products Revenue of FMC, 2006-2011
 - Lithium Carbonate Downstream Fields into which FMC Marched, 2011
 - Revenue and Net Profit of Rockwood, 2007-2011
 - Revenue and Net Profit of Rockwood by Businesses, 2007-2011
 - Proven and Probable Ore Reserves and Metal Content of Kings Valley
 - Total Assets, Costs and Net Profit of Western Lithium, FY2009-FY2011
 - Revenue and Net Profit of Talison Lithium, FY2009-FY2012
 - Output, Sales and Average Prices of Lithium Concentrate of Talison Lithium, FY2010-FY2012
 - Revenue and Net Profit of Nordic Mining, 2008-2012
 - Operation of Galaxy Resources on Cattlin Lithium Ore, 2011
 - Lithium Battery Project Plan of Galaxy Resources, 2011
 - Existing and Proposed Production Capacity of Lithium Carbonate Manufacturers Worldwide, 2011
 - Revenue and Net Profit of CITIC Guoan, 2006-2012
 - Revenue and Gross Margin of CITIC Guoan by Products, 2009-2011
 - Production Capacity and Output of Qinghai Guoan, 2007-2012
 - Revenue and Net Profit of Qinghai Guoan, 2006-2011
 - Revenue and Net Profit of Tibet Mineral, 2006-2012
 - Revenue and Net Profit of Tibet Mineral by Products, 2009-2011
 - Reserves and Features of Key Salt Lake with High Lithium Content Worldwide
 - Output and Sales of Tibet Mineral, 2008-2011
 - Lithium Products Sales of Tibet Mineral, 2008-2011

- 
- Lithium Carbonate Project On Construction of Tibet Mineral, 2011
 - Revenue and Net Profit of Salt Lake Group, 2006-2010
 - Lithium Carbonate Production Capacity of Salt Lake Industry, 2010-2012
 - Revenue and Net Profit of Western Mining, 2008-2012
 - Output of Lithium Carbonate of Qinghai Lithium, 2007-2009
 - Revenue and Net Profit of Tianqi Lithium, 2008-2012
 - Revenue of Tianqi Lithium by Products, 2008-2011
 - Revenue of Tianqi Lithium by Regions, 2008-2011
 - Gross Margin of Tianqi Lithium by Products, 2008-2011
 - Lithium Mineral Resources of Tianqi Lithium
 - Output of Lithium Carbonate Products and Derivative Lithium Products of Tianqi Lithium, 2007-2011
 - Sales of Lithium Carbonate Products and Derivative Lithium Products of Tianqi Lithium, 2007-2011
 - R&D Costs and % of Total Revenue of Tianqi Lithium, 2007-2011
 - Key Projects On Construction of Tianqi Lithium, 2011
 - Production Capacity of Tianqi Lithium by Products, 2007-2012
 - Procurement Value of the Top 5 Suppliers of Tianqi Lithium, 2011
 - Revenue and Net Profit of Foshan Electrical and Lighting, 2008-2012
 - Revenue and Net Profit of Western Resources, 2008-2012
 - Revenue and Gross Margin of Lithium Carbonate Business of Western Resources, 2010-2011
 - Production Capacity, Output and Sales of Jiangxi Lithium, 2010-2011
 - Revenue and Net Profit of Ganfeng Lithium, 2008-2012
 - Revenue of Ganfeng Lithium by Products, 2008-2011
 - Gross Margin of Ganfeng Lithium by Products, 2008-2011
 - Production Capacity of Ganfeng Lithium by Products, 2008-2012
 - Production Capacity of Key Products of Xinjiang Lithium Salt Plant, 2011

- 
- Production Capacity of Key Products of N&Co Guorun , 2011
 - Production Capacity of Key Products of JiXiang Lithium , 2011
 - Production Capacity of Key Products of Guangsheng Lithium , 2011
 - Production Capacity of Key Products of China Lithium, 2011
 - Production Capacity of Key Chinese Lithium Carbonate Manufacturers

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Li Chen	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

Hard copy2,300 USD
 PDF (Single user license)2,200 USD
 PDF (Enterprisewide license)..... 3,400 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.