Global and China Consumer Electronic Lithium Battery Industry Report, 2011-2012

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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 China Battery Industry Association, National Bureau of Statistics of China and WIND Database etc.

Abstract

This report covers the followings:

- Lithium Battery and Industry Chain
- Lithium Battery Market
- Lithium Battery Cathode Market
- 15 Lithium Battery Anode Companies
- Lithium Battery Anode Market
- 3 Lithium Battery Anode Companies
- Lithium Battery Separator Market
- 8 Lithium Battery Separator Companies
- Lithium Battery Electrolyte Market
- 7 Lithium Battery Electrolyte Companies
- 14 Lithium battery Companies

Because of the great variance between the consumer electronic lithium battery industry and the automotive lithium battery industry, this report only analyzes lithium battery for consumer electronics, while the other is dealt with in another report.

In 2011, the global shipment of lithium battery cell for consumer electronics reached 4,309 million units; in 2012, the figure will be 4,758 million units. In 2011, the global consumer electronic lithium battery cell market valued USD 8,499 million; in 2012, the value will rise to USD9, 627 million.

The global consumer electronic lithium battery industry was pioneered by Japanese manufacturers. In 2005, with the emergence of Chinese companies represented by BYD, China, Japan and South Korea divided up the global market. Since 2010, Chinese companies has recessed, while South Korean peers has been speeding up their pace, with whom Japanese companies can compete by dint of its superiority in technology.

Major Lithium Battery Companies and Their Revenue, 2010-2011 (USD mln)

	2010	2011
BAK	215	214
BYD	323	328
LISHEN	259	393
PANASONIC	3,396	3,528
ATL (TDK)	526	578
SONY	1,128	1,078
SAMSUNG SDI	1,929	2,485
LG Chemical	1,315	1,713
Simplo	1,163	1,642
Dynapack	539	798
Celexpert	269	159
DESAY BATTERY	78	170
SUNWODA	87	130
SUCD	226	244

(The last six are packaging companies.)

In 2011, the most conspicuous change in the market rested with the substantial increase in the shipment of lithium polymer battery. Lithium polymer battery is ultra-thin, and the thinner is, the easier production becomes; but, its demerit is the lower energy density. For Tablet PC and Ultrabook, lithium polymer battery is the only choice. For mobile phone manufacturers, if the energy density of lithium polymer battery can be further improved, they will use the battery more often. However, all of Apple's MacBook, iPhone, iPad and iPod adopt lithium polymer battery for thin shape and light weight. Lithium polymer battery must be customized, as usual imbedded in products and irreplaceable.

Sony is the inventor of lithium polymer battery, but its price is more expensive and it is unpopular in the market, mainly used in Sony's own products and high-end Ultrabook. ATL of Japan's TDK also has the most advanced lithium polymer battery technology like Sony. ATL’s production base is located in Dongguan, and it offers competitive price and therefore becomes the main supplier of Apple.

As investors foresee the bright future of the lithium battery industry, the investment in the field of lithium battery materials throve in 2010, featuring fierce market competition. Particularly for cathode materials, the average price of lithium cobalt oxide fell by 16% year on year in 2011. The cathode material revenue of Ningbo Shanshan Co., Ltd which is the largest cathode material producer declined by more than 30% and made a loss of RMB4.21 million in 2011.

The anode material industry features high maturity and low gross profit, and there are few new entrants in this field. In 2011, cathode material manufacturers made remarkable performance. As for separator, although with a quite high gross margin, the industry has a high threshold for entry; and many businesses endeavors to access into the separator industry, but seldom of them succeeded. Accordingly, the market structure remained essentially unchanged.

In respect of electrolyte, South Korean manufacturers emerged, Japanese counterparts shrank, and Chinese players performed well.

Table of contents

1 Overview of Lithium Battery Industry
1.1 Brief Introduction to Lithium Battery
1.2 Lithium Battery Manufacturing Process
1.3 Global Lithium Battery Market Size
1.4 Geographical Pattern of Global Lithium Battery Industry
1.5 China Lithium Battery Industry
1.5.1 Overview of China Lithium Battery Industry
1.5.2 Export of Rechargeable Lithium Battery
1.6 Ranking in Global Lithium Battery Industry
1.7 Lithium Battery Industry Chain
1.7.1 Cost Structure
1.7.2 Industry Chain
1.7.3 Lithium Carbonate
1.8 Lithium Polymer Battery

2 Lithium Battery Market
2.1 Mobile Phone Market
2.2 Global Mobile Phone Industry
2.3 Mobile Phone Battery Market Share
2.4 Laptop Market
2.5 Tablet PC Battery and Ultrabook Battery

3 Lithium Battery Cathode
3.1 Brief Introduction
3.3 Market Trend
3.4 Global Pattern
3.5 Chinese Pattern
3.6 Manufacturers
3.6.1 Umicore
3.6.2 SHANSHAN
3.6.3 Easpring
3.6.4 Hunan Reshine New Material
3.6.5 Ningbo Jinhe New Material
3.6.6 Citic Guoan Mengguli (CITIC GUOAN MGL) New Energy Technology
3.6.7 Tianjin B&M Science and Technology
3.6.8 Pulead Technology Industry
3.6.9 ShenZhen TianJiao Technology Development
3.6.10 Nichia
3.6.11 L&F
3.6.12 Tanaka-chem
3.6.13 TODA KOGYO
3.6.14 Tianjin STL Energy Technology
3.6.15 Yunnan Huilong

4 Lithium Battery Anode
4.1 Brief Introduction
4.2 Industry Structure
4.3 Chinese Pattern
4.4 Manufacturers
4.4.1 Shenzhen BTR Electronic Material
4.4.2 Morgan Hairong New Material
4.4.3 Hitachi Chemical

5 Lithium Battery Separator
5.1 Brief Introduction
5.2 Global Pattern
5.3 Manufacturers
5.3.1 Asahi Kasei
5.3.2 TONEN
5.3.3 Celgard
5.3.4 Shenzhen Senior Technology Material
5.3.5 Foshan Jinhui Hi-Tech
5.3.6 Xinxiang Green New Energy
5.3.7 ENTEK
5.3.8 SK Energy

6 Lithium Battery Electrolyte
6.1 Brief Introduction
6.2 LiPF6
6.3 Industry Structure
6.4 Chinese Pattern
6.5 Manufacturers
6.5.1 CAPCHEM
6.5.2 Zhangjiagang Guotaihuarong Chemical
6.5.3 Cheil Industries (PanaxeTec)
6.5.4 UBE
6.5.5 Mitsuibishi Chemical
6.5.6 Soulbrain
6.5.7 Foosung

7 Lithium Battery Companies
7.1 BAK
7.2 BYD
7.3 SUCD
7.4 Tianjin Lishen
7.5 ATL
7.6 SONY
7.7 SDI (Samsung SDI)
7.7.1 Tianjin Samsung SDI
7.8 LG chemical
7.9 Simplo
7.10 Dynapack
7.11 Clexpert
7.12 Desay Battery
7.13 SUNWODA
7.14 Panasonic

Selected Charts

- Global Lithium Battery Shipment, 2005-2014
- Global Lithium Battery Market Size, 2005-2014
- Global Lithium Battery ASP, 2005-2014
- Downstream Distribution of Global Lithium Battery Market, 2009-2015
- Global Lithium Battery Shipment by Form, 2009-2015
- Global Lithium Battery Market by Form, 2009-2015
- Global Lithium Battery Industry by Region (by Value), 2005-2012
- Revenue of Top 10 Rechargeable Lithium Battery Enterprises in China, 2011
- China's Rechargeable Lithium Battery Output by Region, H1 2012
- Rechargeable Lithium Battery Export Volume and Value in China, 2007-2011
- Export Value of Major Rechargeable Lithium Battery Companies in China, 2007-2011
- Top 10 Export Destinations of China's Rechargeable Lithium Battery, 2010
- Top 10 Export Destinations of China's Rechargeable Lithium Battery, 2011
- Shipment of Major Global Lithium Battery Companies, 2005-2012
- Ranking of Major Global Lithium Battery Companies by Revenue, 2009-2012
- Cost Structure of Lithium Cobalt Oxide Battery
- Lithium Battery Industry Chain
- Global Lithium Ore Supply by Region
- Distribution of Global Lithium Ore Manufacturers
- Quarterly Shipment of Major Global Lithium Polymer Battery Companies, Q1 2010-Q4 2012
- Demand for Lithium Polymer Battery, Q1 2006-Q4 2012
- Global Mobile Phone Shipment, 2007-2014
- 3G/4G Mobile Phone Shipment by Region, 2010-2012
- Shipment of Major Global Mobile Phone Manufacturers, Q1 2012-Q2 2012
- Market Share of Major Global Smart Phone Manufacturers, Q2 2012

Selected Charts

- Shipment of Major Global Mobile Phone Manufacturers, 2010-2011
- Market Share of Major Mobile Phone Battery Companies, 2010-2011
- Relationship between Mobile Phone and Battery
- Mobile Phone Battery Suppliers of Nokia by Proportion, 2012
- Mobile Phone Battery Suppliers of Samsung by Proportion, 2012
- Mobile Phone Battery Suppliers of Apple by Proportion, 2012
- Global Laptop Shipment, Q1 2010-Q4 2012
- Laptop Battery Suppliers of HP by Proportion, 2012
- Laptop Battery Suppliers of Dell by Proportion, 2012
- Laptop Battery Suppliers of Acer by Proportion, 2012
- Laptop Battery Suppliers of Lenovo by Proportion, 2012
- Laptop Battery Suppliers of Toshiba by Proportion, 2012
- Laptop Battery Suppliers of ASUS by Proportion, 2012
- Market Share of Major Tablet PC Battery Manufacturers, 2012
- Comparison of Main Anode Material Technologies
- Global Lithium Battery Cathode Material Shipment by Technology, 2009-2014
- Market Share of Major Lithium Battery Cathode Material Manufacturers, 2010
- Market Share of Major Lithium Battery Cathode Material Manufacturers, 2011
- Global Lithium Battery Cathode Material Shipment by Type, 2011
- Relationship between Lithium Cobalt Oxide Manufacturers and Battery Manufacturers
- Ranking of Major Lithium Battery Cathode Manufacturers in the World by Revenue, 2010-2012
- Ranking of Major Lithium Battery Cathode Manufacturers in China by Revenue, 2010-2011
- Lithium Iron Phosphate Suppliers in China, 2010
- Umicore’s Organizational Structure
- Umicore’s Revenue and EBIT Rate, 2005-2012

Selected Charts

- Umicore’s Energy Material Revenue and EBIT, 2008-2011
- Umicore's Battery Material Bases
- Umicore's Organizational Structure in China
- Umicore's Distribution in China
- Umicore’s Revenue in China by Product
- Shanshan’s Revenue and Gross Margin, 2007-2012
- Shanshan’s Revenue and Operating Margin, 2007-2012
- Shanshan’s Revenue by Product, 2007-2011
- Easpring's Subsidiaries
- Easpring's Customer Distribution, 2007-2009
- Easpring’s Cost Distribution, 2009
- Easpring’s Revenue and Operating Margin, 2007-2012
- Easpring’s Revenue by Client, 2011
- Organizational Structure of Hunan Reshine New Material
- Revenue of Tianjin B&M Science and Technology by Product, 2007-2009
- Capacity and Output of Tianjin B&M Science and Technology, 2007-2009
- Sales Volume of Tianjin B&M Science and Technology, 2007-2009
- Top 5 Clients of Tianjin B&M Science and Technology, 2009
- Top 5 Suppliers of Tianjin B&M Science and Technology, 2007-2009
- Organizational Structure of Pulead Technology Industry
- Nichia’s Revenue and Operating Margin, 2003-2012
- Revenue and Operating Margin of Nichia’s Material Division, 2007-2012
- L&F’s Revenue and Operating Profit, 2006-2012
- L&F’s Revenue and % of Battery Material Revenue, 2006-2011
- Tanaka-chem’s Revenue and Operating Profit, FY2006-FY2013

Selected Charts

- Tanaka-chem's Shipment , FY2009-FY2012
- Tanaka-chem's Revenue by Application, FY2010-FY2012
- Revenue and Operating Profit of TODA KOGYO, FY2006-FY2013
- Battery Anode Material Revenue of TODA KOGYO, FY2006-FY2012
- Global Distribution of Battery Material Production Bases of TODA KOGYO
- Comparison between Main Anode Material Technologies
- Global Lithium Battery Anode Material Shipment by Type, 2011
- Relationship between Lithium Battery Anode Manufacturers and Battery Manufacturers
- Market Share of Major Lithium Battery Anode Material Manufacturers, 2010
- Market Share of Major Lithium Battery Anode Material Manufacturers, 2011
- Market Share of Major Lithium Battery Anode Material Manufacturers, 2012
- Organizational Structure of Shenzhen BTR
- Financial Performance of Shenzhen BTR, 2008-2011
- Revenue and Operating Margin of Hitachi Chemical, FY2004-FY2011
- Revenue by Division of Hitachi Chemical, FY2004-FY2010
- Market Share of Major Lithium Battery Separator Manufacturers, 2010
- Market Share of Major Lithium Battery Separator Manufacturers, 2011
- Market Share of Major Lithium Battery Separator Manufacturers, 2012
- Main Clients of Major Lithium Battery Separator Manufacturers, 2010
- Revenue and Operating Profit of Asahi Kasei, FY2005-FY2011
- Revenue of Asahi Kasei by Product, FY2009-FY2011
- Operating Profit of Asahi Kasei by Product, FY2009-FY2011
- Organizational Structure of Asahi Kasei
- Organizational Structure of Electronic Material Division of Asahi Kasei
- Polypore's Revenue and Operating Margin, 2005-2012

Selected Charts

- Polypore's Revenue by Product, 2005-2011
- Lithium Hexafluoroarsenate Capacity and Growth Rate of Japan Morita
- Market Share of Major Lithium Battery Electrolyte Manufacturers, 2010
- Market Share of Major Lithium Battery Electrolyte Manufacturers, 2011
- Market Share of Major Lithium Battery Electrolyte Manufacturers, 2012
- Market Share of Major Lithium-ion Battery Electrolyte Manufacturers in China, 2012
- UBE's Revenue by Division, FY2007-FY2010
- UBE's Operating Profit by Division, FY2007-2010
- Soulbrain's Revenue and Operating Margin, 2006-2012
- Soulbrain's Revenue by Business, 2009-2012
- Foosung's Revenue and Operating Profit, 2008-2012
- Foosung's Revenue by Product, 2008-2012
- Foosung's Lithium Hexafluoroarsenate Output, 2007-2012
- BAK's Organizational Structure
- BAK's Battery Development Course
- BAK's Battery Revenue and Operating Margin, FY2003-FY2012
- BAK's Revenue and Gross Margin, Q1 FY2010-Q2 FY2012
- BAK's Battery Revenue by Product, FY2004-FY2011
- BAK's Battery Revenue by Region , FY2004-FY2011
- BAK's Major Battery Clients
- BAK's Revenue by Application, Q3 2011
- BAK's Battery Capacity Utilization, Jan & Dec 2009
- BYD's Revenue and Operating Margin, 2004-2012
- BYD's Revenue by Product, 2005-2012
- BYD's Battery Revenue by Product, 2003-2015

Selected Charts

- BYD's Rechargeable Battery Gross Margin and Capacity Utilization, 2008-2015
- BYD's Battery Gross Margin, 2008-2015
- BYD's Average Battery Sales Price, 2006-2010
- BYD's Battery Shipment, 2006-2011
- BYD's Battery Revenue by Product, 2008-2010
- BYD's Battery Capacity, Output, Sales Volume and ASP, 2008-2010
- SUCD's Revenue and Pretax Profit Margin, 2003-2012
- SUCD's Revenue by Product, 2009
- SUCD's Revenue by Product, 2010
- SUCD's Battery Sales Volume, 2005-2010
- SUCD's Revenue by Product, 2011
- Lishen's Revenue and Shipment , 2004-2011
- Lishen's Revenue and Operating Margin, 2004-2010
- Revenue and Operating Margin of Samsung SDI, 2003-2012
- Battery Revenue and Operating Profit of Samsung SDI, 2007-2012
- Battery Shipment and Average Selling Price of Samsung SDI, 2005-2012
- Revenue and EBITDA of LG CHEM, 2004-2012
- Battery Revenue of LG CHEM, Q1 2009-Q2 2012
- Simplo's Revenue and Gross Margin, 2000-2012
- Simplo's Monthly Revenue, Jul. 2010-Jul. 2012
- Simplo's Shipment and ASP, 2004-2012
- Simplo's Laptop Battery Market Share, 2004-2012
- Dynapack's Revenue and Gross Margin, 2002-2012
- Dynapack's Monthly Revenue, Jul. 2010-Jul. 2012
- Celexpert's Revenue and Gross Margin, 2006-2012

Selected Charts

- Celexpert's Monthly Revenue and YoY Growth Rate, Jul. 2010-Jul. 2012
- SUNWODA's Revenue by Product, 2008-2011
- SUNWODA's Gross Margin by Product, 2008-2011

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