Global and China Lithium Battery Separator Industry Report, 2014-2016

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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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

The lithium battery cell is composed of cathode material, anode material, electrolyte and separator, of which, lithium battery separator as a high value-added material with the highest technical barrier among lithium battery materials accounts for about 15-20% of the battery cost. The main role of the separator is to separate the positive and negative electrodes of the lithium-ion battery, thus preventing two neighboring contacts from a short circuit.

In 2013, the global and Chinese lithium battery separator mainly presented the following characteristics:

First, the global capacity was expanded by a large margin, and prices continued to fall.

According to ResearchInChina, the global mainstream suppliers of separator (other than China) had put 1.018-billion-m2 capacity into production as of 2013, of which, the wet process held a dominant position by attaining 848 million m2; the dry process contributed 170 million m2, which came mainly from U.S.-based Celgard and Japan-based UBE Industries, with 180-million-m2 dry process capacity under construction.

The global shipment of lithium battery separator increased from 273 million m2 in 2008 to 843 million m2 in 2013, so did the overall capacity from 362 million m2 to 1.9 billion m2, the capacity expansion grew much faster than demand. The global capacity utilization then fell to 44% in 2013.

Boosted by the huge market demand for separator, the global capacity will continue to be released. It is expected that the global lithium battery separator market will be featured with quantity increases and price collapses, with the average price falling from USD1.73 / m2 in 2013 to USD1.48 / m2 in 2016.

Second, the lithium battery separator market concentration continued to decline.

As the Chinese lithium battery separator capacity was put into production in large quantities, the global separator market concentration suffered decline. In 2013, Japan-based Asahi Kasei, U.S.-based Celgard, South Korea-based SKI and Japan-based Toray Tonen occupied a 56.8% share of the global market, showing a sharp decline as opposed to the market concentration in 2008, when Asahi Kasei, Celgard, Toray Tonen and UBE Industries as the top four companies accounted for 82.8%.

In 2013, China's domestic separator shipment reached 265 million m2, showing a year-on-year increase of 61%, the proportion (in global shipment) rose from 17% in 2010 to 31% in 2013, so did the localization rate from 28% to 52%. The same year, the three biggest suppliers of separator in China - Xinxiang Zhongke Science and Technology (GREEN) Co., Ltd, Shenzhen Senior Technology Material Co., LTD and Foshan Jinhui Hi-tech Optoelectronic Material Co., Ltd hit 52.4% market share.

Third, the high-performance separator will become the main demand growth point for the future lithium battery separator market.

In 2013, the global shipment of lithium battery separator attained 843 million m2, up 33.2% YoY; the compound growth rate was 22.6% in 2007-2013. In view of the strong demand from electric vehicles, energy storage devices, etc. for power lithium battery, the global demand for lithium battery separator will come to 1.99 billion m2 in 2016, at a compound growth rate as high as 33% in 2013-2016.

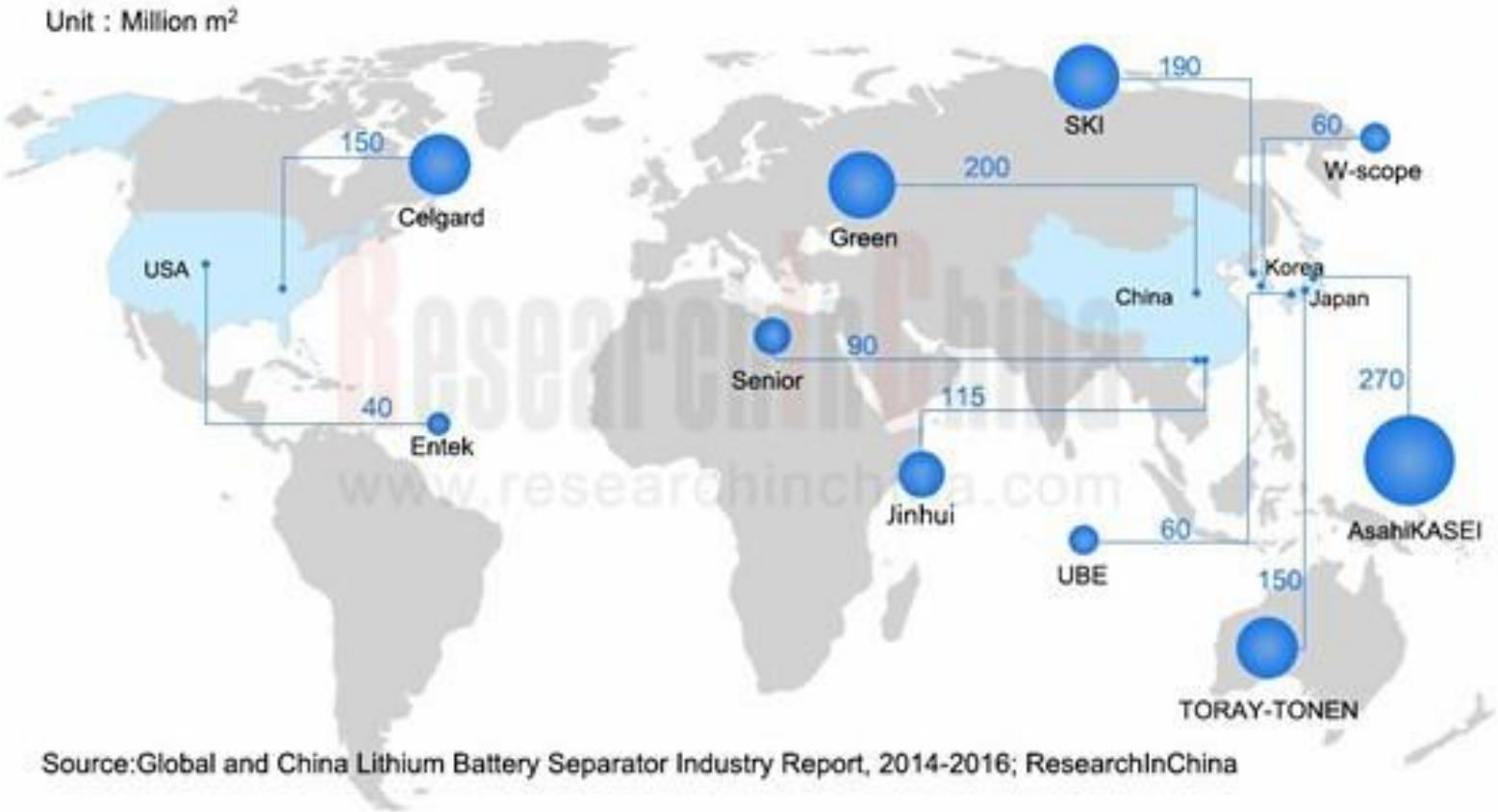
The global shipment of ordinary lithium battery separator used for 3C electronic products reached 633 million m2 in 2013, expected to grow at a compound rate of only 11% in 2013-2016, to 1.135 billion m2 by 2016. This is due to the slowdown in global demand for notebook, smartphone, tablet PC and other digital products since 2014.

In 2013, the global shipment of high-performance separator used for electric vehicles and energy storage devices realized 210 million m2, accounting for 25% of the demand; by 2016, the shipment will hit 1.135 billion m2 (at a compound growth rate of 75% in 2013-2016), with a demand proportion of 57%. Thus, the high-performance separator will become the main demand growth point for the lithium battery separator market in the future.

Global and China Lithium Battery Separator Industry Report, 2014-2016 by ResearchInChina mainly covers the followings:

- ※ Production preparation process, key technical performance and technology development direction of lithium battery separator;
- ※ Shipment, import volume, market size, price, etc. of the global and Chinese lithium battery separator industry;
- ※ Market share, manufacturing technique, capacity, supply relationship, etc. of global and Chinese lithium battery separator companies;
- ※ Shipment, market size, cell vendors of global and Chinese ordinary lithium batteries and power batteries.
- ※ Operation, technology, market, production & marketing of ten lithium battery separator companies in China;
- ※ Operation, technology, market, production & marketing of nine lithium battery separator companies in the world.

Capacity of Major Lithium Battery Separator Enterprises, 2013



Source:Global and China Lithium Battery Separator Industry Report, 2014-2016; ResearchInChina

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Table of contents

1 Introduction to Lithium Battery Separator
1.1 Properties and Application
1.2 Classification

2 Lithium Battery Separator Production Preparation and Technical Performance
2.1 Base Material
2.1.1 Polyolefin
2.1.2 Non-woven Fabrics
2.1.3 Ceramic Coating
2.2 Production Technique
2.2.1 Wet Process
2.2.2 Dry Process
2.2.3 Comparison of Production Techniques
2.3 Key Technical Indices
2.3.1 Porosity
2.3.2 Air Permeability
2.3.3 Electrolyte Uptake
2.3.4 Aperture Size and Distribution
2.3.5 Mechanical Property
2.3.6 Automatic Shutdown Protection Performance
2.3.7 Thermal Shrinkage
2.3.8 Comparison of Key Technical Indices
2.4 Development Orientation of Technology

3 Global Lithium Battery Separator Industry
3.1 Global Lithium Battery Separator Market
3.1.1 Market Demand
3.1.2 Market Size
3.1.3 Product Price
3.2 Global Lithium Battery Separator Companies
3.2.1 Market Share
3.2.2 Technique and Capacity
3.2.3 Supply Relationship

4 China Lithium Battery Separator Industry
4.1 China Lithium Battery Separator Market
4.1.1 Market Demand
4.1.2 Homemade/Imported Separator
4.1.3 Market Size
4.1.4 Product Price
4.2 Chinese Lithium Battery Separator Companies
4.2.1 Market Share
4.2.2 Technique and Capacity
4.2.3 Supply Relationship

5 Global and China Lithium Battery Industry
5.1 Global Demand for Lithium Battery
5.1.1 Demand for Ordinary 3C Lithium Battery
5.1.2 Demand for Power Lithium Battery
5.1.3 Lithium Battery Shipment
5.1.4 Lithium Battery Market Size
5.2 China's Demand for Lithium Battery
5.2.1 Demand for Power Lithium Battery
5.2.2 Lithium Battery Shipment
5.2.3 Lithium Battery Market Size
5.3 Major Lithium Battery Manufacturers
5.3.1 Market Share
5.3.2 Power Battery Manufacturers

6 Global Li-ion Battery Separator Manufacturers
6.1 Asahi Kasei
6.1.1 Profile
6.1.2 Technology & Technique
6.1.3 Layout in China
6.1.4 Production and Marketing Network
6.1.5 Capacity and Output
6.2 Celgard
6.2.1 Profile
6.2.2 Technology & Technique
6.2.3 Layout in China
6.2.4 Production and Marketing Network
6.2.5 Capacity and Output
6.2.6 Investment Plan
6.3 Toray Tonen
6.4 UBE
6.4.1 Profile
6.4.2 Technology & Technique
6.4.3 Production and Marketing Network
6.4.4 Capacity and Output
6.5 SKI
6.5.1 Profile
6.5.2 Technology & Technique
6.5.3 Capacity and Output
6.5.4 Customers
6.6 Entek
6.7 Mitsubishi Chemical
6.7.1 Profile
6.7.2 Technology & Technique
6.8 Sumitomo Chemical
6.9 Evonik Industries
6.10 W-Scope
6.10.1 Profile
6.10.2 Operation
6.10.3 Gross Margin
6.10.4 Capacity and Output

7 Chinese Li-ion Battery Separator Manufacturers
7.1 Xinxiang Zhongke Science and Technology (GREEN) Co., Ltd
7.2 Shenzhen Senior Technology Material Co., Ltd
7.3 Foshan Jinhui Hi-tech Optoelectronic Material Co., Ltd
7.4 Cangzhou Mingzhu Plastic Co., Ltd
7.5 Jiangxi Xian Cai Nanofibers Technology Co., Ltd
7.6 Sinoma Science & Technology Co., Ltd
7.7 Zhejiang Great Southeast Co., Ltd
7.8 Jiangsu Jiujiujiu Technology Co., Ltd
7.9 Nantong Tianfeng New Electronic Materials Co., Ltd

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Selected Charts

- Working Principles of Li-ion Battery
- Polyolefin Separator Structure and Features
- Characteristics of Non-woven Fabric Separator Technology and Typical Companies
- Improvement of High Temperature Resistance of Ceramic Coated Separator
- Micrograph of Wet Process PE Separator
- Micrograph of Dry Process PP Separator
- Structure and Features of Lithium Battery Separator with Varied Production Techniques
- Comparison: Investment Costs of Wet Process and Dry Process in China
- Comparison: Air Permeability of Different Separators
- Aperture Distribution of Separators with Different Preparation Methods
- Comparison: Tensile Strength of Different Separators
- Comparison: Puncture Strength of Different Separators
- Comparison: Automatic Shutdown Performance of Different Separators
- Comparison: Thermal Shrinkage of Different Separators
- Key Technical Indices of Separators with Different Base Materials
- Common Electronics and Automobiles' Consumption of Lithium Battery Separator
- Global Shipment of Lithium Battery Separator, 2007-2016E
- Global Shipment of Ordinary and High-performance Lithium Battery Separator, 2008-2016E
- Global Lithium Battery Separator Market Size, 2008-2016E
- Average Price of Global Lithium Battery Separator, 2008-2016E
- Market Share of World's Lithium Battery Separator Enterprises by Shipment, 2013
- Market Share of World's Lithium Battery Separator Enterprises by Shipment, 2008
- Techniques and Production Capacities of International Lithium Battery Separator Manufacturers at the End of 2013
- Supply Relationship of International Lithium Battery Separator Manufacturers, 2013
- Supply Relationship of International Power Lithium Battery Separator Manufacturers, 2013
- China's Shipment of Lithium Battery Separator, 2009-2016E
- China's Shipment of Ordinary and High-performance Lithium Battery Separator, 2009-2016E

Selected Charts

- Proportion of China's Shipment of High-performance Lithium Battery Separator in Global Total, 2010-2016E
- Shipment of China-made Lithium Battery Separator, 2009-2016E
- Shipment of China-made Lithium Battery Separator and % in Global Total, 2009-2016E
- China-made and Imported Lithium Battery Separator Volume and Import Dependency, 2010-2016E
- Import Volume and Value of Polyolefin Lithium Battery Separator in China, 2009-2016E
- Import Sources of Polyolefin Lithium Battery Separator in China, 2013
- China Lithium Battery Separator Market Size, 2009-2016E
- Market Size of Home-made and Imported Lithium Battery Separators in China, 2009-2016E
- Average Price of Home-made and Imported Separators in China, 2009-2016E
- Market Share of Chinese Lithium Battery Separator Enterprises by Shipment, 2013
- Market Share of Chinese Lithium Battery Separator Enterprises by Sales Value, 2013
- Techniques and Production Capacities of Chinese Lithium Battery Separator Manufacturers at the End of 2013
- Supply Relationship of Chinese Lithium Battery Separator Manufacturers, 2013
- Applications of Li-ion Battery
- Global Shipment of Notebook PC, Tablet Computer and Mobile Phone, 2012-2016E
- Global Shipment of Lithium Battery for Notebook PC, Tablet Computer and Mobile Phone, 2012-2016E
- Global Sales Volume of Electric Vehicle, 2008-2016E
- Battery Capacity and Cruising Ability of Global Key Electric Vehicles
- Single-vehicle Battery Capacity of Global Electric Vehicle, 2008-2016E
- Power Battery Demand of Global Electric Vehicle, 2008-2016E
- Global Shipment of Lithium Battery, 2008-2016E
- Structure (%) of Global Demand for Lithium Battery, 2012-2016E
- Global Shipment of Lithium Battery by Demand, 2008-2016E
- Global Lithium Battery Industry Scale, 2008-2016E
- Electric Vehicle Sales Volume in China, 2008-2016E
- Proportion of China's Sales Volume of Electric Vehicle in Global Total, 2008-2016E
- China's Shipment of Lithium Battery, 2008-2016E

Selected Charts

- Proportion of China's Shipment of Lithium Battery in Global Total, 2008-2016E
- China Lithium Battery Industry Scale, 2008-2016E
- Proportion of China's Lithium Battery Industry Scale in Global Total, 2008-2016E
- China Power Lithium Battery Industry Scale and Its Proportion in the World, 2010-2016E
- Proportions of China's, Japan's and South Korea's Shipment of Lithium Battery, 2012-2013
- Market Share of World's Small Lithium Battery Firms, 2013
- Market Share of World's Power Lithium Battery Enterprises, 2013
- The Joint-stock Suppliers of Power Lithium Battery in the World
- Battery Technologies and Sales Value of Chinese Power Lithium Battery Enterprises, 2013
- Operating Revenue Structure of Asahi Kasei, FY2013/14
- Battery Separator Micrograph of Asahi Kasei
- Lithium Battery Separator (Asia Excluding Japan) Production Bases of Asahi Kasei
- Administrative Organization of Asahi Kasei (China)
- Lithium Battery Separator (Japan) Production Bases of Asahi Kasei
- Lithium Battery Separator Capacity Release of Asahi Kasei, 2004-2013
- Contact Means of Battery Separator Marketing Division of Asahi Kasei
- Battery Separator Output, Capacity and Capacity Utilization of Asahi Kasei, 2008-2013
- Celgard's Branches Worldwide
- Technical Parameters of Celgard's Battery Separator
- Administrative Organization of Celgard (China)
- Global Production Bases and Marketing Network of Celgard's Lithium Battery Separator
- Battery Separator Output, Capacity and Capacity Utilization of Celgard, 2008-2013
- Battery Separator Investment Plan of Celgard
- Equity Structure of Toray Tonen
- Battery Separator Output, Capacity and Capacity Utilization of Toray Tonen, 2008-2013
- Business Performance of UBE, Sep.2008-FY2013/14
- Operating Revenue Structure of UBE, FY2013/14

Selected Charts

- Business Performance of UBE, Sep.2008-FY2013/14
- Operating Revenue Structure of UBE, FY2013/14
- Contact Means of Battery Separator Business Division of UBE
- Battery Separator (Japan) Production Bases of UBE
- Battery Separator Output, Capacity and Capacity Utilization of UBE, 2008-2013
- Key Subsidiaries under SKI
- Battery Separator Output, Capacity and Capacity Utilization of SKI, 2009-2013
- Contact Means of Battery Separator Business Division of Entek
- Technical Parameters of Entek's Battery Separator
- Operating Revenue Structure of Mitsubishi Chemical, FY2013/14
- Global Branches of Mitsubishi Chemical
- Lithium Battery Separator Manufacturing Techniques of Mitsubishi Chemical
- Operating Revenue Structure of Mitsubishi Chemical, FY2013/14
- Technical Performance of Lithium Battery Separator of Mitsubishi Chemical
- Global Branches of Mitsubishi Chemical's Electronic Materials Division
- Business Performance of W-Scope, 2010-2014
- Battery Separator Marketing Regions of W-Scope, 2013
- Gross Margin of W-Scope's Battery Separator, 2009-2013
- Battery Separator Output, Capacity and Capacity Utilization of W-Scope, 2009-2013
- Technical Parameters of GRE-P Series Separator of Xinxiang Zhongke Science and Technology (GREEN)
- Technical Parameters of GRE-T Series Separator of Xinxiang Zhongke Science and Technology (GREEN)
- Technical Parameters of GRE-H Series Separator of Xinxiang Zhongke Science and Technology (GREEN)
- Lithium Battery Separator Output, Capacity and Capacity Utilization of Xinxiang Zhongke Science and Technology (GREEN), 2007-2013
- Major Customers for Lithium Battery Cell of Shenzhen Senior Technology Material
- Global Marketing Network of Shenzhen Senior Technology Material
- Wet Process and Dry Process Lithium Battery Separator Micrograph of Shenzhen Senior Technology Material
- Special Lithium Battery Separator Micrograph of Shenzhen Senior Technology Material

Selected Charts

- Lithium Battery Separator Investment and Production Expansion Scheme of Shenzhen Senior Technology Material
- Lithium Battery Separator Output, Capacity and Capacity Utilization of Shenzhen Senior Technology Material, 2007-2013
- Changes in Equity Structure of Foshan Jinhui Hi-tech Optoelectronic Material
- Business Performance of Foshan Jinhui Hi-tech Optoelectronic Material, 2009-2013
- Technical Parameters of Ordinary Lithium Battery Separator of Foshan Jinhui Hi-tech Optoelectronic Material
- Technical Parameters of Strengthened Lithium Battery Separator of Foshan Jinhui Hi-tech Optoelectronic Material
- Lithium Battery Separator Investment and Production Expansion Plan of Foshan Jinhui Hi-tech Optoelectronic Material
- Lithium Battery Separator Output, Capacity and Capacity Utilization of Foshan Jinhui Hi-tech Optoelectronic Material, 2008-2013
- Business Performance of Cangzhou Mingzhu Plastic, 2009-2014Q1
- Operating Revenue Structure of Cangzhou Mingzhu Plastic, 2007-2013
- Gross Margin of Main Business of Cangzhou Mingzhu Plastic,2007-2013
- Technical Parameters of Lithium Battery Separator of Cangzhou Mingzhu Plastic
- Lithium Battery Separator Production & Sales and Revenue of Cangzhou Mingzhu Plastic, 2012-2013
- Lithium Battery Separator Investment and Production Expansion Scheme of Cangzhou Mingzhu Plastic
- Lithium Battery Separator Output, Capacity and Capacity Utilization of Cangzhou Mingzhu Plastic, 2012-2016
- Electric Vehicle Sales Volume of BYD, 2013-Mar.2014
- Lithium Battery Capacity and Separator Demand of BYD Electric Vehicle
- Power Lithium Battery and Separator Demand of BYD, 2012-2016E
- Lithium Battery Separator Revenue and Net Income of Cangzhou Mingzhu Plastic, 2012-2016
- Equity Structure of Jiangxi Xian Cai Nanofibers Technology
- Operation of Jiangxi Xian Cai Nanofibers Technology, 2012-2013
- Technical Parameters of Polyimide (PI) Nano Battery Separator of Jiangxi Xian Cai Nanofibers Technology
- Polyimide (PI) Nano Battery Separator Investment Plan of Jiangxi Xian Cai Nanofibers Technology
- Lithium Battery Separator Investment Plan of Sinoma Science & Technology
- Lithium Battery Separator Investment Plan of Zhejiang Great Southeast
- Lithium Battery Separator Investment Plan of Jiangsu Jiujiujiu Technology
- Technical Parameters of Lithium Battery Separator Technology of Nantong Tianfeng New Electronic Materials
- Development Trend of Li-ion Battery

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