Global and China Lithium Battery Electrolyte Industry Report, 2016-2020

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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

Driven by emerging application markets such as new energy vehicles and industrial energy storage, the global lithium battery electrolyte market has been growing steadily. In 2015, the sales volume jumped by 42.1% year on year to 117,000 tons; and it is expected to exceed 600,000 tons in 2020.

As the world's largest consumer of lithium battery electrolyte, China sold 63,000 tons of lithium battery electrolyte in 2015, up 48.9% year on year; the output value amounted to RMB2.86 billion, a year-on-year surge of 52.2%. The output value grew faster than the sales volume mainly because: First, functional electrolyte which is expensive than conventional electrolytic accounted for a rising proportion of the sales volume. Second, the soaring raw material prices pushed up the electrolyte price from RMB90,000/ton in early 2015 to over RMB200,000/ton at the end of the year. The uptrend is expected to continue in 2016.

By applications, electric vehicle and energy storage will become major growth engines of lithium batteries. The global shipment of electric vehicle power lithium battery surged beyond 110% year on year to 20.8GWh in 2015, and will grow at the CAGR of above 50% in 2016-2020. However, the shipment of small lithium batteries used for consumer electronics represented by smart phones and tablet PCs will see sharp slowdown with an expected growth rate of 5% -10% in the future.

Concerning the development trend, high voltage and temperature-resistant electrolyte will be the focus, mainly because: First, high voltage electrolyte (above 4.35V) makes up about 70% in the consumer electronics field, and the proportion will rise further in future. Second, high-voltage cathode materials are developing rapidly in the field of power and energy storage batteries, but the high-voltage resistant electrolyte is relatively backward now; only a small number of Japanese and American companies master high-voltage 5V electrolyte production technology, and the majority of Chinese enterprises have embarked on R & D of high-voltage electrolyte, but lagging behind the international level.

In terms of competitive landscape, the global lithium battery electrolyte market is highly concentrated. In 2015, the world's top ten electrolyte companies seized the combined market share of approximately 62.2%. Capchem replaced Panax-Etec to become the world's largest manufacturer of lithium battery electrolyte with the market share of 9.2%, and Panax-Etec ranked second with 8.8%. Over the same period, China's top ten electrolyte manufacturers occupied the combined market share of over 85%.

Panax-Etec sells 55% of its products to its biggest lithium electrolyte client -- Samsung SDI. In addition, the company shares some of its electrolyte patents with Samsung SDI.

Being optimistic about Chinese new energy vehicle market, **Mitsubishi Chemical** has set up lithium battery electrolyte production base (Changshu city) and anode material production base (Qingdao city) in China, with the lithium battery electrolyte capacity of 10,000 t/a.

Lithium Battery Electrolyte Market Share and Accounts of Global Main Manufacturers

Manufacturers	Market Share	Key Accounts									
		SDI	Panasonic	Sony	LGC	BYD	AESC	ATL	BAK	Lishen	Guoxuan High-Tech
		√	√	√		√		√	√	√	
		√			√	√		√	√	√	
		√	√		√			√		√	√
			√	√	√		√				
				√		√		√			√
		√		√					√	√	
LG Chem					√						

Source: *Global and China Lithium Battery Electrolyte Industry Report, 2016-2020*, ResearchInChina

Capchem acquired 76% stake in Zhangjiagang Hicomer Chemical Co., Ltd. (a producer of lithium battery additives) in 2014 to get involved in the upstream electrolyte industry chain. In 2015, it raised the lithium battery electrolyte capacity to 20,000 t/a, but its capacity utilization desired to be improved.

Guotai Huarong put its 5,000 t/a lithium battery electrolyte project into operation formally in 2015, so that the company's lithium battery electrolyte capacity was expanded to 10,000 t/a. In addition, the company has also established South Korea Guotai Huarong to cooperate with South Korean customers in R & D of lithium battery electrolyte.

Global and China Lithium Battery Electrolyte Industry Report, 2016-2020 by ResearchInChina highlights the followings:

- Development history, market size, competition pattern, development trend, etc. of lithium battery electrolyte worldwide;
- Market size, market price, competitive landscape, etc. of lithium battery electrolyte industry in China;
- Market size, competition, etc. of main upstream and downstream lithium battery electrolyte industries;
- Operation, customers, production, marketing, etc. of six foreign and ten Chinese lithium battery electrolyte manufacturers.

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