



China Lithium Battery Equipment Industry Report, 2016-2020

Oct. 2016

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

In 2015, the Chinese lithium battery equipment market ushered in a high-speed development period, with the full-year market size surging 150.83% to RMB12.2 billion, of which China-made equipment accounted for 68.3%. It is expected that during 2016-2020 China's lithium battery equipment market will grow at an average annual rate of 33%, to RMB54.4 billion till 2020, which would be mainly propelled by the rapid growth of lithium battery, especially of power lithium battery.

Fueled by a surge in the output of new energy vehicles, the demand for power lithium battery in China grew 169.8% year on year to 15.9Gwh in 2015. We project that the demand will keep an AAGR of 46% to 118.3GWh by 2020.

At present, lithium battery equipment is mainly used to manufacture power lithium batteries and lithium batteries for consumer electronics and energy storage. Specifically, the power lithium battery equipment boasts the largest market size, at RMB7 billion in 2015, occupying 55.9%. And this proportion is expected to rise to 78% by 2020.

By technological process, lithium battery equipment mainly falls into front-end equipment and back-end equipment. In 2015, front-end equipment accounted for a 53% market share and back-end equipment 47%. As the key equipment for manufacturing lithium batteries, coating machine (a kind of front-end equipment) had a market size of RMB3.8 billion in 2015, making up 31.1% of the lithium battery equipment market in China. It is anticipated that by 2020 this figure will be likely to climb to RMB15.2 billion.

In terms of competitive landscape, the Chinese lithium battery equipment industry is so scattered that enterprises have low concentration. In 2015, the top 5 Chinese lithium battery equipment manufacturers, namely Wuxi Lead Intelligent Equipment, Yinghe Technology, Shenzhen New Katop Automation Technology, Areconn Precision Machinery, and Shenzhen Xinyuren Technology, held a combined market share of just 16.3%. Among them, Wuxi Lead Intelligent Equipment seized the largest share of 4.3%, followed by Yinghe Technology 3.9%.

In the future, with a boom in the downstream demand, large Chinese producers of lithium battery equipment will bring the integration of production lines into reality through M&A and industry chain extension. In contrast, small and medium-sized enterprises will focus on industry segments and realize specialized production by strengthening technical development to improve product performance. Also driven by the strategic initiative INDUSTRIE 4.0 and the policies for, say, intelligentization, the trend developing towards intelligence and full automation of lithium battery equipment has become increasingly apparent.

Distribution of Major Lithium Battery Equipment Manufacturers in China by Product, 2016

Company	Blender	Coater	Roller Press	Slitting Machine	Pelletier	Die-Cutter	Winder	Laminating Machine	Welding Equipment	Infusing Machine	Detection Equipment	PACK Equipment
Yinghe Technology		√	√	√	√	√	√	√	√	√	√	√
Wuxi Lead Intelligent Equipment				√	√		√	√	√	√		
Zhuhai Higrand Technology					√		√					
Shenzhen Haoneng Technology		√	√	√	√		√					
Zhengye Technology											√	
Beijing Sevenstar Electronics	√	√	√	√								
Areconn Precision Machinery		√		√	√		√					
ONARISEIMITSU											√	√
Shenzhen New Katop Automation Technology		√										
Shenzhen Greensun Automation Technology					√	√	√	√	√	√	√	√
RePower Technology											√	√
Xingchengjie Precise Equipment					√	√	√				√	√
Greensun Technology						√		√				
Dongguan ALI System					√			√				
HYNN Technologies											√	√
HOMBO Technology		√		√		√		√	√	√	√	√

The report mainly deals with the following:

- ⇒ Policy environment, market size, product mix, competitive landscape, and development trends of lithium battery equipment in China;
- ⇒ Development of lithium battery equipment product segments in China (including coater, laminating machine, winding machine, and Pack equipment);
- ⇒ Corporate competition and development of global and Chinese lithium battery market;
- ⇒ Development of lithium batteries for consumer electronics, energy storage and power battery as well as demand for lithium battery equipment in China;
- ⇒ Operation and development in China of 4 global lithium battery equipment companies;
- ⇒ Operation, development strategies, etc. of 15 Chinese lithium battery equipment enterprises.

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