



**Global and China Lithium-ion Battery
Anode Material Industry Report, 2017-2020**

Mar.2017

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

Lithium battery is primarily composed of cathode materials, anode materials, separator, and electrolyte. Anode materials, one of vital raw materials, make up 5%-15% of lithium battery cost.

Currently, global lithium battery anode materials industry is concentrated in China and Japan, which occupy more than 95% of anode materials sales worldwide. Japanese enterprises are in a leading position technologically while China boasts obvious cost advantages in anode materials production because of abundant graphite mineral resources.

China produced 122.5 kilotons of anode materials in 2016, up 68.3% year on year. Driven by new energy vehicle demand, China's production of anode materials is expected to register a high CAGR of 30-35% in upcoming years, and then reach 295 kilotons in 2020.

In 2016, BTR, Hitachi Chemical, Shanshan, Mitsubishi Chemical, Nippon Carbon and JFE Chemical took top six positions in global anode materials market share ranking (by sales volume), claiming a combined 71.1% share, with Hitachi Chemical, Shanshan, Nippon Carbon and JFE Chemical specializing in artificial graphite, BTR and Mitsubishi Chemical in natural graphite.

So far, China has established a relatively complete industrial chain for anode materials, with three regions i.e. Pearl River Delta, Yangtze River Delta, and Central China (Hunan and Henan) formed. With a high regional concentration, the number of anode materials production enterprises in the three regions accounts for over 80% of the national total.

As concerns competitive landscape of key players, Shenzhen BTR New Energy Materials, Shanshan Technology and Jiangxi Zichen Technology still occupy the top three slots despite a gradually narrowing gap in market share, especially in output value between Jiangxi Zichen Technology and Shanshan Technology. Second-tier manufactures such as Shenzhen Sinuo Industrial Development, Huzhou Chuangya Power Battery Materials, Hunan Shinzoom Technology, Jiangxi Zhengtuo New Energy Sc. & Tech. and Fujian XFH New Energy Materials (formerly Shenzhen XFH Technology) driven by the power battery market keep rapid growth in output value, e.g. XFH benefiting from BYD, Guangzhou Great Power Energy & Technology and other power battery companies.

Global Shipments of Lithium Battery Anode Materials, 2010-2020E



Source: ResearchInChina

The report highlights the following:

- ◆ Market size and forecast, competitive landscape, new anode materials development, etc. of global lithium-ion battery anode materials industry;
- ◆ Policies, market size and forecast, competitive landscape, price trend, etc. of China's lithium-ion battery anode materials industry;
- ◆ Market size, competitive landscape, imports & exports, price trend, etc. of global and China's raw material industries (graphite, silicon carbide, lithium titanate, graphene, etc.) of anode materials;
- ◆ Market size, competitive landscape, analysis and forecast for the demand for anode materials, etc. of global and China's lithium battery industries;
- ◆ Profile, anode materials business, operation, etc. of 15 global and Chinese anode materials manufacturers;
- ◆ Profile, lithium titanate materials business, operation, etc. of 3 global and Chinese lithium titanate materials producers.

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