Global and China Lithium-ion Battery

Anode Material Industry Report, 2020-2026

August 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 costeffective 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.

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Abstract

Lithium battery is comprised of cathode material, anode material, separator and electrolyte, of which anode material as a key raw material makes up 5%-15% of lithium battery cost. In 2019, China shipped 265,000 tons of anode materials, a year-on-year upsurge of 38.0%. By one estimate, the robust demand for new energy vehicles will drive up anode materials output to 597,000 tons in 2026, showing CAGR of 12.3% between 2019 and 2026.



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Anode materials fall into three types: carbon materials (graphite-based), metallic oxide materials and alloy materials. In 2019, China shipped 208,000 tons of artificial graphite, or roughly 78.5% of its total anode materials shipment, up 9.2 percentage points versus 2018; the shipment of natural graphite was 49,000 tons, occupying 18.5% or so; other materials were 8,000 tons, with an around 3.0% share.

China and Japan are the key players in global lithium battery anode materials industry, together selling over 95% of the global total anode materials. Japan leads in technology, while China that abounds in graphite mineral resources has a marked cost advantage. Japanese anode material suppliers are typically Hitachi Chemical, JFE, Mitsubishi Chemical, Nippon Carbon and Nippon Steel, among which Hitachi Chemical primarily provides artificial graphite, JFE focuses on mesocarbon microbeads (MCMB) and Mitsubishi Chemical and Nippon Carbon are natural graphite suppliers. In China, suppliers are led by Shenzhen BTR, Ningbo Shanshan, Jiangxi Zichen, Guangdong Kaijin and Shenzhen Xiangfenghua, of which Shenzhen BTR mainly operates natural graphite, with a sideline of artificial graphite, and Jiangxi Zichen, Guangdong Kaijin and Ningbo Shanshan all basically produce artificial graphite. In 2019, the world's top five anode material producers were Shenzhen BTR, Jiangxi Zichen, Ningbo Shanshan, Guangdong Kaijin and Hitachi Chemical, with a combined 69.65% share in the global market.

The report highlights:

- ◆ Lithium-ion battery anode materials (definition, classification, industry chain, etc.);
- Global lithium-ion battery anode material industry (market size & forecast, competitive landscape, development of new anode materials, etc.);
- China lithium-ion battery anode material industry (policies, market size & forecast, competition pattern, price trend, etc.);
- Upstream raw materials like graphite, silicon carbide, lithium titanate, graphene, etc. for anode material (market size, competition pattern, import & export, price trend, etc.);
- Global and China lithium battery market (size, competition, the demand for anode materials and forecasts);
- ◆ 15 global and Chinese anode material manufacturers (profile, operation, anode material business, etc.);
- ◆ 3 global and Chinese lithium titanate manufacturers (profile, operation, lithium titanate business, etc.)

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