

# China Li-ion Battery E-News 2105

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## Abstracts

China Li-ion Battery E-News provides you with real-time intelligence on China's lithium-ion battery market.

It is a monthly published newsletter, which can be downloaded in PDF format. The subscription period is yearly, grants the subscriber 12 issues in total.

China's Li-ion battery market has developed at breakneck pace in recent years, fuelled by the rise of the mobile phone, the tablet, and more lately the electric vehicle and energy storage industries.

Up to this point, Chinese manufacturers have used cost advantages to grab market share from their competitors in Japan, Korea and the US, but their long-term future is still uncertain as they struggle to close the R&D gap between themselves and their international competitors. Industry consolidation is also sure to accelerate over the next few years.

China Li-ion Battery E-News will help you stay ahead of the game in this fast-changing market with real-time reporting on the entire Li-ion battery industry chain, from lithium ore and brine markets through anode and cathode materials and electrolyte to the downstream consumer electronics, EV and energy storage markets. This includes:

Breaking news from China and abroad

The latest market data, including price information for raw materials, intermediates and end products, import/export data, production, consumption, operating rates, etc.

In-depth analysis of market trends, Chinese government policy, the performance

of leading Chinese producers, M&A, new technologies, and more

Expert commentary from industry insiders, including regular guest articles and interviews with insiders at leading Chinese manufacturers, associations and government organizations

## HEADLINE

The current high price of LiPF<sub>6</sub> has raised concerns about whether it will go through a sharp plunge. Yang Zhixuan, chief financial officer of Tonze, said that a serious plunge in the price of LiPF<sub>6</sub> is unlikely to occur. Since the start of 2021, China's li-ion battery industry has seen a good development and li-ion battery enterprises have been under cost pressure due to soaring prices of key materials.

Yongxing Materials signed a long-term cooperation agreement with Yifeng Hua Lithium Mining to ensure the supply of raw materials for its lithium carbonate project.

Ganfeng Lithium agreed on its wholly-owned subsidiary Ganfeng International's offering to acquire the remaining shares of Bacanora. After the transaction is completed, the Sonora project will all become part of the assets of Ganfeng Lithium.

Chengxin Lithium will divest its rare earth business and focus on producing new energy materials. Yahua Group announced that it has decided to expand the production capacity of battery-grade lithium hydroxide of the original investment project from 20,000 t/a to 50,000 t/a in order to continuously meet the demand of downstream customers.

GHTECH plans to build a new project in its established plant to efficiently reuse waste li-ion batteries and promote high-performance battery materials.

China's installed capacity of power battery in April registered 8.40 GWh, up 134% YoY. CCM collected the prices of cathode materials throughout May and concluded that the price of LiFePO<sub>4</sub> would keep on the upward trend.

In May, the price of anode materials remained steady; the price of electrolytes was under severe pressure; and the price of separators remained steady.

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### Headline

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### Market Dynamics

Price of LiPF<sub>6</sub> less likely to plummet

Li-ion battery enterprises under cost pressure

NDRC conducts regulatory talks with key commodities enterprises

### Company dynamics

Yongxing Materials signs cooperation agreement with Yifeng Hua Lithium Mining

Ganfeng Lithium to acquire clay lithium extraction project

Chengxin Lithium to focus on producing new energy materials

Yahua Group to build 50,000 t/a battery-grade lithium hydroxide project

Huayou Cobalt plans to acquire Tianjin B&M

Progress of CNNC TD's LFP project

Tinci with mass production technology of sodium hexafluorophosphate

### Upstream Dynamics

GHTECH to build a recycling project of waste LiFePO<sub>4</sub>

CNGR to build 35,000 t/a precursor material project

Three parties to produce high-nickel ternary cathode materials in joint venture

Yongxing Materials to raise capital to support lithium carbonate and other projects

Sinomine's battery-grade lithium hydroxide to go into production in H2 2021

### Downstream Dynamics

Installed capacity of power batteries achieves YoY growth in April

DFD to build 20GWh li-ion battery project

### Import and Export

Import and export of major Li-ion battery materials and Li-ion batteries in China in April 2021

### Price Update

Prices of major Li-ion battery materials in China in May 2021

Price of LiFePO<sub>4</sub> keeps rising

Prices of anode materials remain steady

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