

China Li-ion Battery E-News 2010 (12 issues per year)

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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

Data shows that China's cumulative export volume of ternary material precursors from Jan. to Aug. 2020 stood at 55,521 tonnes, up by 36.10% YoY.

Since Sept., there has been a growing demand for lithium hexafluorophosphate, and the price of the product has also risen, bringing an increase in the price of electrolyte.

Altura's bankruptcy and reorganisation will not lead to the shortage of domestic lithium concentrate supply for the time being; the strong domestic downstream demand may lead to short-term supply shortage of lithium carbonate. It is expected that the price of lithium carbonate will remain stable in Q4, or will rise slightly driven by demand.

On 26 Oct., Yinghe Technology announced that it had won the bid for CATL's USD212.40 million (RMB1.44 billion) lithium battery equipment order.

Weihua Group plans to construct a 30,000 t/a lithium hydroxide project in Shehong City through its wholly-owned subsidiary Suining Shengxin Lithium.

In mid-Oct., Tianqi Lithium, Ganfeng Lithium and Yahua Industrial Group released their reports or forecasts on Q1–Q3 performance.

In Oct., 'Yunshan green mine for graphite ore and graphite deep processing project' was in steady progress, with a daily output of 30,000 tonnes of graphite ore.

In Sept. 2020, the installed capacity of power battery in China was about 6.57 GWh, with a YoY growth of 66.10%, achieving a YoY increase for three consecutive months.

In Oct., the price of cathode materials stayed basically stable. It is expected that the terminal market for batteries will continue to show upward trend before the end of the year, and the price of cathode materials will remain stable.

In Oct., the price of anode materials remained stable; the price of electrolyte rose slightly; and that of separators remained stable. It is expected that the prices of anode materials and other materials will fluctuate slightly, but will basically remain stable.

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Headline

Editor's Note

Market Dynamics

Export demand for ternary precursors increases

Rise of lithium hexafluorophosphate price drives up electrolyte price

Company Dynamics

Australian lithium concentrate producer Altura goes bankruptcy and reorganisation

Yinghe Technology wins bid for CATL's order

Weihua Group plans to build 30,000 t/a lithium hydroxide project

Several lithium salt enterprises release reports or forecasts on Q1–Q3 performance

LG Chem's performance reaches new high in Q3

Corun plans to build li-ion battery base in Yiyang Hunan

Ganfeng Lithium's second-tier subsidiary plans to build li-ion battery base

First Phase of 50,000 t/a LFP project of Shanxi Energy Technology goes into trial production

Upstream Dynamics

Yunshan graphite project in steady progress

New reserves of spodumene ore found in Yelonggou

South Huiton suspends li-ion battery separator project

Sichuan Jintaneng's anode material project to be settled in Tianquan County

Lopal Tech plans to build li-ion battery material project in Pengxi

Downstream Dynamics

Installed capacity sees YoY increase in Sept.

CATL ranks second globally in EV battery installed capacity

Import and Export

Import and export of major Li-ion battery materials and Li-ion batteries in China in Aug. 2020

Price Update

Prices of major Li-ion battery materials in China in Oct. 2020

Price of cathode materials remains stable

Price of anode materials stays stable

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