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China Lead-acid Battery Industry Report, 2011-2012

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Abstracts

At present, China is the world's largest lead-acid battery producer and exporter, with its lead-acid battery output sharing about 1/3 of global total. In 2011, China's output of lead-acid battery hit 142 million KVAH, down 1.3% from a year earlier, while the export value reached US$1.879 billion, up 6.5% year-on-year.

China lead-acid battery industry is now featured as follows:

Raw material price is highly sensitive. 76% of lead-acid battery raw material costs come from refined lead. Impacted by the rising lead prices in recent years, the gross profit of the lead-acid battery industry has dropped from 20% to less than 15%.

Policies affect supply and demand. From 2006-2010, China’s lead-acid battery output and demand grew stably; the market saw a slight oversupply. In 2011, China rectified the industry, which caused a large number of enterprises to close down; the reversal of supply and demand brought about the gap of 13.6 million KVAH.

New energy storage batteries become a hot spot for investment. Chinese government supports the new energy industry vigorously, which stipulates the growing demand for new energy storage batteries. From 2006 to 2011, the demand for new energy storage batteries grew at the CAGR of 88.3%.

Corporate profitability has close bearing on product types. Among lead-acid battery manufacturers, Fengfan Co., Ltd focuses on vehicle starter battery; yet the downstream sector features high market concentration, and downstream

players are comparatively stronger, which makes Fengfan's bargaining ability weak and gross margin low. In 2011, Fengfan’s gross margin was just 12.7%. Chaowei Power and Tianneng Power give priority to bicycle power battery; downstream sector is characterized by low market concentration, therefore, both of them have powerful bargaining ability and they gain high gross margin. In 2011, Tianneng Power realized the gross margin of 28.2%, and Chaowei Power 32.1%.In addition, Coslight Group lays emphasis on communication-use batteries, with the three major domestic telecom operators from the downstream. The profitability of Coslight Group is influenced by the growth rate of telecom investment, and its gross margin fluctuates violently. From 2009 to 2011, the gross margin of Coslight Group fell from 26.6% to 17.1%.

Extension of industrial chains becomes a key development strategy for enterprises. To ease the cost pressure of raw materials, some companies have begun to expand the industrial chain towards the upstream and the downstream. Coslight Group acquired a lead-zinc mine in Russia's Primorsky Territory in 2006 to enter the lead-acid battery upstream and reduce the pressure caused by rising lead prices. Camel Group develops secondary lead to get involved in the downstream industry chain.

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