

Global and China Lithium Carbonate Industry Report, 2016-2020



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Driven by a surge in sales volume of new energy vehicles in China, the upstream material- lithium carbonate was in short supply in the fourth quarter of 2015 with soaring prices. Global lithium carbonate output increased by 12.3% year on year to 202,800 tons in 2015 and is expected to arrive at 244,200 tons in 2016, 288,900 tons in 2017, and 341,000 tons in 2018, a rise of 20.4%, 18.3%, and 18.4% from a year ago, respectively.

The booming sales of new energy vehicles worldwide will boost lithium carbonate consumption significantly. According to estimates, every 100,000 new energy vehicles (electric bus (40%), electric sedan (20%), hybrid bus (25%), and hybrid sedan (15%)) will create a demand of 5,000 tons to 8,000 tons of battery-grade lithium carbonate, about a rise of 5%-8% in global demand for battery-grade lithium carbonate.

The price of lithium carbonate in China has been going straight up since Oct 2015 with that of industrial-grade and battery-grade lithium carbonate rising substantially (to RMB120,000/t and RMB150,000/t in Jan 2016, respectively, when battery-grade lithium hydroxide was quoted at RMB140,000/t, compared with the bottom price of lithium carbonate standing at RMB50,000/t). It is expected that global demand for lithium carbonate will outpace supply during 2016-2017, leading to a continued price rise during this period. As new lithium carbonate capacities are gradually released after 2017, the price will tend to stabilize.

Global lithium resources are primarily concentrated in Chile and China. However, as the Chinese lithium carbonate manufacturers are restrained by production technology, the supply of capacity is limited and Chile and Australia hold the lion's share of global capacity. The world's top3 players- SQM, FMC, and Rockwood together seize more than 56% market share, which give them a strong bargaining power over downstream companies and powerful pricing power and allow them to adjust prices according to market supply & demand and changes in production costs. Global lithium carbonate companies have successively expanded capacity so as to meet ever-increasing market demand in recent years. Meanwhile, a large number of newcomers outside the industry build new capacity and get involved in lithium carbonate business, thus reducing the concentration of the industry.

Chinese lithium carbonate suppliers can be principally divided into two categories: salt lake providers represented by Tibet Urban Development and Investment, spodumene providers represented by Sichuan Tianqi Lithium Industries and Galaxy Resources. The exploitation of salt lakes in China is still in its infancy with small capacity, while spodumene providers represented by Sichuan Tianqi Lithium Industries are relatively competitive.

In 2014, China produced 43,000 tons of lithium carbonate, a year-on-year rise of 16.5%, 23,000 tons of lithium hydroxide monohydrate, up 4.5% over the previous year and mainly concentrated in Sichuan, and 2,600 tons of lithium metal, an increase of 13% from a year ago, compared with global output of around 4,000 tons. An output of 49,000 tons and apparent consumption of 74,000 tons caused a supply gap of 25,000 tons in 2015, and the gap is expected to reach 31,400 tons in 2020, creating brisk demand for imports.

We believe that as the Chinese government scales up its support for new energy vehicles, the demand for

battery-grade lithium carbonate will be a tipping point. China's demand for battery-grade lithium carbonate was about 27,800 tons in 2015 and is expected to exceed 100,000 tons in 2020. The country's total demand for lithium carbonate will increase at annual rate of 20% over the next couple years, higher than the global average and approximating 167,000 tons in 2020.

Global and China Lithium Carbonate Industry Report, 2016-2020 by ResearchInChina highlights the followings:

- Global and China's lithium carbonate supply and demand, supply gap, the demand for lithium carbonate from downstream sectors, especially new energy vehicles, energy storage, and consumer electronics;
- Global and China's competitive landscape, including market share of foreign and domestic companies, capacity planning, market pattern, etc.;
- China's lithium carbonate imports and exports, covering import/export value, prices, sources, destinations, etc.;
- China's production costs of lithium carbonate with lithium extracted from ores and from salt lake brine, price trends, etc.;
- China's lithium battery industry, including shipments, technology routes, market pattern, etc.;
- Operation, technology, development planning, and output & sales of 8 lithium carbonate players in the United States, Chile, Australia, etc.;
- Operation, technology, development planning, and output & sales of 14 Chinese lithium carbonate companies.

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