

Global and China Automotive Lithium Battery Industry Report, 2011-2012

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Abstracts

The report highlights the followings:

Introduction to lithium battery, HEV, PHEV and EV

Market and industry pattern of automotive lithium battery

Lithium battery cathode industry

15 lithium battery cathode vendors

Lithium battery anode industry

3 lithium battery anode vendors

Lithium battery separator industry

8 lithium battery separator vendors

Lithium battery electrolyte industry

7 lithium battery electrolyte vendors

9 automotive lithium battery vendors

Three categories of automotive lithium battery are hybrid electric vehicle (HEV), plug-in

hybrid electric vehicle (PHEV) and electric vehicle (EV), of which EV is also called battery electric vehicle (BEV) and derives all its power from battery packs. Toyota Prius is a typical HEV and occupies roughly 70% HEV market share. It is the only full hybrid electric vehicle and features exceedingly high technical barriers, and other companies can only develop micro hybrid or mild hybrid electric vehicles. In 2011, the sales volume of Toyota Prius hit 630,000 units.

The market size of automotive lithium battery approximated USD1.3 billion in 2011 and is expected to reach USD1.8 billion in 2012, USD2.8 billion in 2013 and USD4.4 billion in 2015. In 2011, the sales volume of HEVs and EVs got to around 900,000 units and 437,000 units respectively. However, EV serves as the largest consumer of automotive lithium battery. For instance, 78% of the demand for automotive lithium battery was from EVs in 2011. It is expected that EVs will be the largest market for automotive lithium battery from now until 2018.

In the EV market, Nissan Leaf and Mitsubishi i-MiEV are the shining ones. AESC is the sole supplier of lithium battery for Leaf, as well as for Renault's Fulgence and Kangoo. Now GS Yuasa's LEJ acts as the sole supplier of lithium battery for i-MiEV and French PSA.

The PHEVs include GM's Chevrolet Volt, Toyota's Prius PHV and BYD's F3DM. LG Chem supplies lithium battery for Chevrolet Volt, Ford's EV Focus, Hyundai's HEV and Volvo which is held by Geely. PEV supplies lithium battery for Toyota, VW's Q5 HEV and JETTA HEV. Hitachi Vehicle Energy provides lithium battery for GM's 2012 Buick LaCrosse, 2012 Buick Regal and 2013 Chevrolet Malibu Eco. And Toshiba will provide lithium battery for Honda's EV Fit.

Wanxiang Group acquired 80% equities in A123 Systems which provides lithium battery for BMW's HEV. A123 Systems suffered a huge loss and ran out of cash in Q2 2012, so it had to sell its shares for cash to maintain operation, and Wanxiang Group should make preparations for long-term losses. Ener1, which was once heavily subsidized by the U.S. government, was delisted from Nasdaq in January 2012 and once maintained cooperative relationship with Wanxiang Group. After seven consecutive years of huge losses, it has filed for bankruptcy protection.

SB LiMotive is a joint venture between Samsung SDI and Bosch, but their cooperation came to an end in July 2012. Bosch will partner with the world's chemical giant BASF to establish lithium battery production lines, while Samsung SDI will acquire the shares held by Bosch. In 2011, SB LiMotive realized revenue of KRW29.5 billion, but made a

loss of KRW175.5 billion.

In addition to LG Chem, Japanese companies are absolutely the overlord in the automotive lithium battery industry and exercise total control over the upstream raw materials and downstream vehicle markets. Except for Toshiba that invents special SCiB, other producers including LG Chem tend to choose LMO for cathode materials, which means that LFP will be completely eliminated.

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