

Global and China Lead-acid Battery Industry Report, 2015-2018

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Abstracts

Lead-acid battery industry is a typical one of high energy consumption and heavy pollution. A large amount of electricity is consumed and pollutants such as lead dust/fume, acidic leached wastewater, acid fog, and waste residues are discharged during the process of production. The center of global lead-acid battery production continues to transfer from developed countries to developing nations. As China's share of global lead-acid battery output has risen from 35% in 2010 to 42% in 2014, the country's development of lead-acid battery industry is of great significance to the world. Americas, primarily United States, made up 27% of global lead-acid battery output in 2014.

Global lead-acid battery demand amounted to 478.09 million KVAh in 2014, up 5.7% from a year ago, with China contributing a good portion of increase and the rest of the world maintaining average growth rate of around 2%. With enhanced efforts by the Chinese government to regulate lead-acid battery industry in the aspect of environmental protection since 2015 and the effect of lithium battery replacing lead-acid battery, global lead-acid battery demand growth is expected to fall along with that in China in the future, stabilizing at 2%-3%.

China's demand for lead-acid battery grew by 12.4% to 213.50 million KVAh and lead-acid battery revenue went up 11.2% to RMB129 billion in 2014. The demand for the lead-acid battery for electric bicycle increased by -0.8%, the lead-acid battery for automotive starting 12.8%, the lead-acid battery for electric tricycle and low-speed electric vehicle both over 40%, and the lead-acid battery for communications around 14%.

Since 2015, affected by the effect of lithium battery substitution, the demand for the lead-

acid battery for electric bicycle has dropped quickly; sluggish demand from upstream sectors resulted in significantly slower growth in demand for the lead-acid battery for automotive starting and electric tricycle. In addition, as the year 2015 is the deadline for cleaning up excess capacity and the capacity causing severe pollution, a large number of small lead-acid battery producers can't get access permits, and have to stop production for rectification or produce secretly, leading to further slower apparent growth rate.

Johnson Controls is the world's largest lead-acid battery producer with a 15.7% market share in 2014. In spite of this, the company is suffering a sustained decline in market share from as high as 26% in 2010. As companies continue to expand capacity, the advantage of market leader is waning. Meanwhile, as China pursues the elimination of outdated capacity, the market space for small companies keeps narrowing. Attracted by emerging markets (lithium battery and PV), some companies (like Panasonic) reduces investment in lead-acid battery.

Lead-acid battery finds wide applications in transportation, communications, power, and railway industries. Starting battery (automobile, motorcycle), power battery (electric bicycle, electric tricycle, low-speed electric vehicle, ATV/special-purpose electric vehicle), and communications back-up power hold a combined 90% share of total lead-acid battery consumption.

Over the next couple years, the demand for the automotive start-stop battery and Pb-C energy storage battery is expected to present a CAGR of 30%-40%, the battery for low-speed electric vehicle 25%-30%, the battery for electric tricycle and ATV/special-purpose electric vehicle around 10%-15%, and automotive starting battery within 9%.

For now, the lead-acid battery for communications back-up power, energy storage, and electric bicycle will be hardest hit by lithium battery in the short term. It is expected the application of lead-acid battery in communications back-up power will shrink slightly and the demand for the lead-acid battery for electric bicycle will see a negative annual growth of above 15% over the next few years.

Global and China Lead-acid Battery Industry Report, 2015-2018 by ResearchInChina focuses on the followings:

Global and China's lead-acid battery industry (status quo of development, industrial policies, orientation of technological development);

Global and China's lead-acid battery industry (industry size, demand, import & export, competition pattern, demand forecast for the next few years);

Competitive products (lithium battery, NI-MH battery, Pb-C battery) faced by lead-acid battery (comparison of technologies, applications, costs, shipments & trends, and major market participants);

Application industries of lead-acid battery, covering automobile, back-up power & energy storage, electric bicycle, electric tricycle, low-speed electric vehicle, and ATV/special-purpose electric vehicle (status quo of development, demand for lead-acid battery, and market share of major lead-acid battery participants in the segments);

5 global lead-acid battery players (operation, technologies, customers, development planning, and output & sales);

10 Chinese lead-acid battery companies (operation, technologies, customers, development planning, and output & sales).

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