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Global and China Lithium Battery Anode Materials Industry Report, 2016-2020

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Abstracts

Lithium battery is primarily composed of cathode materials, anode materials, separator, and electrolyte. Anode materials, one of vital raw materials, make up 5%-15% of lithium battery cost.

In 2015, global lithium battery anode materials sales amounted to 112,700 tons, mainly produced in China and Japan. As new energy vehicle sales climb year after year, global lithium battery anode materials sales is expected to maintain a growth rate of over 25% over the next five years.

Global lithium battery anode materials are still dominated by natural graphite and artificial graphite, together accounting for roughly 83% in 2015. However, as the demand for power battery rises, novel materials like mesocarbon microbeads (MCMB), lithium titanate (LTO), silicon carbon (Si/C), hard/soft carbon, and other anode materials see rapid growth in output.

In recent years, thanks to explosive growth of the Chinese new energy vehicle market, anode materials sales has burgeoned in China, significantly faster than the global average. China's anode materials sales reached 72,800 tons in 2015, a year-on-year surge of 42.7%, and are expected to record a CAGR of more than 30% over the next five years.

Global anode materials market is occupied mainly by Japanese and Chinese enterprises, with the former leading the way technologically, and the latter having advantage of low production cost because of rich graphite mineral resources in the country.

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In 2015, global top6 anode materials companies (by sales volume) were BTR, Hitachi Chemical, Shanghai Shanshan, MitshubishiChem, Nippon Carbon, and JFE, together holding nearly 70% market share. Hitachi Chemical, Shanghai Shanshan, Nippon Carbon, and JFE focus on artificial graphite, and BTR and Hitachi Chemical specialize in natural graphite.

There had been more than 50 lithium battery anode materials producers in China by the end of 2015, mostly new entrants after 2010. The companies boasting anode materials capacity of over 10,000 tons included BTR (30,000t/a), Shanghai Shanshan Tech (15,000t/a), Jiangxi Zichen Technology (10,000t/a), and Hunan Shinzoom Technology (10,000t/a). As Chinese companies continue to boost anode materials capacity and improve technologies, the domestic market share of anode materials produced by local players will continue to rise over the next couple of years.

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

Global lithium battery anode materials industry (market size and forecast, competitive pattern, development of new anode materials, etc.);

China's lithium battery anode materials industry (policies, market size & forecast, competitive pattern, price trend, etc.);

Global and China's raw materials industry (graphite, silicon carbide, LTO, graphene) of anode materials (market size, competitive pattern, import & export, price trend, etc.);

Global and China's lithium battery industry (market size, competitive pattern, demand for anode materials and forecast, etc.);

15 Global and Chinese anode materials producers (profile, anode materials business, operation, etc.);

3 Global and Chinese lithium titanate producers (profile, lithium titanate business, operation, etc.).

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SELECTED CHARTS

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