Research Report on China's Li-ion Power Battery Industry, 2018-2022

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Abstracts

Description

Driven by the support of government policies and the demand of downstream markets, the production and sales volume of new energy vehicles (all electric vehicles) are growing rapidly in China in recent years. In 2017, the sales volume of new energy vehicles totaled 777,000, increasing by 53.3% YOY and accounting for 2.7% of the total vehicle sales in China. In 2017, the sales volume of battery electric vehicles and plug-in hybrid vehicles reached 652,000 and 125,000 respectively.

The boom in the electric vehicle industry will lead to the substantial growth of lithium batteries and relevant industries. In 2017, China, Japan and South Korea became the power battery production centers in the world. Chinese enterprises took six places of the top 10 power battery manufacturers and three places of the top 5. China has grown into a significant li-ion power battery manufacturer. From the perspective of li-ion power battery shipments, the industry is highly concentrated with the CR10 reaching approximately 80% in 2017. The top li-ion power battery enterprises include Contemporary Amperex Technology Co., Ltd., BYD Company Limited, OptimumNano Energy Co., Ltd., Hefei Guoxuan High-Tech Power Energy Co., Ltd., Shenzhen BAK Battery Co., Ltd. and Farasis Energy (Ganzhou) Co., Ltd. It is noteworthy that the CR5 of the Li-ion power battery industry was up to 67.86% in 2016. In recent years, top li-ion power battery manufacturers expanded production capacity one after another, and formed alliances with downstream automakers (for example, CATL + SAIC and Guoxuan + BAIC) to gain scale advantage when seizing customers.

There are clear expectations for new energy vehicles with the government's great policy support and the upcoming "Measures on Parallel Administration of Passenger Car

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Enterprise Average Fuel Consumption and New-Energy Vehicle Credits". Moreover, no disruptive technology will appear in the power battery industry for the time being. Over the coming 3-5 years, it will be difficult to change the industry structure dominated by ternary batteries and supplemented by lithium iron phosphate batteries. At present, the industry focuses are placed on expanding production capacity for scale advantage and cooperating with automakers for market advantage. The development of new energy vehicles is an important driving force for the development of China's li-ion power battery industry in which the policy environment and economic environment also play an important role. It is expected that li-ion power battery production in China will exceed 150GWh in 2022. There is still a large growth potential for China's li-ion power battery market.

Topics Covered:

- Development environment of the li-ion power battery industry
- Li-ion power battery supply and demand in China
- Competition in the li-ion power battery industry
- Analysis on major li-ion power battery manufacturers
- Costs and price trend of li-ion power batteries
- Driving forces and market opportunities for China's li-ion power battery industry, 2018-2022
- Prospect of China's li-ion power battery industry, 2018-2022

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SELECTED CHARTS

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