

# LIBs for IT applications;global market analysis and forecast

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## Abstracts

### China outstripping Korea in 1Q-2013 Shipments

2012 LiB shipments in the IT sector totaled 4,922 million cells, up 8.5% compared with 4,525 million cells of 2011. It is expected that LiB shipments will increase by 4.7% compared with 2012, reaching 5,141 million cells in 2013 and reach 7,270 million cells in 2018.

In the first quarter 2013, worldwide LiB shipments in the IT sector totaled 1,153 million cells, up 1.2% from the same period a year ago and down 7.3% compared with the previous quarter - the fourth quarter 2012. Major applications excluding mobile phones, power tools, and camcorders showed declines; especially with an over 15% decrease in laptop sales, the actual shipments were 10% less than 1,278 million cells estimated by SNE Research in 2012.

On a country-by-country basis, China ranked top in shipments in the first quarter of 2013, totaling 462 million cells with a 40% market share, and surpassed Korea, which shipped 417 million cells. Korea ranked No. 2 with a 36.1% market share, followed by Japan with total of 275 million cells, resulting in a 23.8% market share. This suggests that the growth in the Chinese IT market is fueling the growth of the secondary battery industry, although the Korean companies, Samsung SDI and LG Chem (LGC) have maintained the No.1 and 2 ranking in the market share.

### Coslight to join China's Top 5

In addition to China's Big 4 companies -ATL, BYD, BAK, LISHEN- Coslight as one of Tier 2 companies shipped 36 million polymer batteries in the first half of 2013 by

increasing its supply to global IT companies, such as HP, ASUS, and Lenovo, and to other Chinese IT companies, such as Huawei, ZTE, and CoolPAD. In this report, analysis of 10 companies -five Chinese companies including Coslight (from the first quarter of 2013), two Korean companies, and three Japanese companies- is provided.

As for LiB shipments by type, prismatic battery shipments totaled 462 million, accounting for 40.1%, cylindrical batteries accounted for a 31.8 market share with the total of 366 million cells. Polymer batteries hit 234 million cells with a 28.1% market share.

In the second of 2013, the total LiB shipments are expected to reach 1,250 million cells with an 8.4% increase as the sales of new applications such as mobile phones, tablets, and ultra PCs. Especially, keen competition is expected in the tablet segment.

#### Estimated Global Demand in IT Sector

In 2012, LiB shipments in the IT sector increased to 4,911 million cells, representing an 8.5% increase compared with 4,525 million cells of 2011. The market is estimated to reach 5,141 million cells with a 4.7% increase compared to 2013, eventually reaching 7,270 million cells in 2018.

By applications, it is forecasted that LiB shipments in the mobile phone segment will total 2,151 million cells, accounting for 41.8%, the notebook segment 22.2%, the tablet segment 13.6%, and the power tool segment 9.1%. Explosive growth is expected in the tablet segment. LiB shipments in the tablet segment are expected to account for 20.1% in 2015, exceeding 19.7% of the notebook segment, 27% in 2018.

As for LiB shipments by type in the 4 major applications -mobile phones, notebooks, tablets, and power tool, 1,728 million prismatic batteries (41.5%) were shipped, 1,483 million cylindrical batteries (35.6%), and 958 million polymer batteries (23.0%) in 2012. Considering the current trend in shipments by type, polymer batteries are expected to increase their portion gradually alongside the rapid growth in the tablet market and product diversification of ultra PCs, hybrid PCs (tablet+notebook), and smart phones; their market share will surpass that of cylindrical batteries in 2013 and expected to reach up to 64.1% by 2018.

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