

Current State of Chinese Secondary Battery Industry (2012~2015)

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Abstracts

The size of the Chinese secondary battery industry in 2015 was 265.3 billion yuan (RMB), which is equivalent to 50 trillion won. It grew 16.2% year-on-year and the average annual growth rate is 6.5% in the last four years. In the center of the growth are lithium ion secondary batteries, especially the growth of cells for electric vehicles. The size of the Chinese lithium ion secondary battery market in 2015 was 98.5 billion yuan (RMB), which grew 1.5 times compared to the year before.?

Power batteries for electric vehicles grew to take up around one third of the whole lithium ion secondary battery market. BYD is number one in market share in terms of shipments, followed by CATL and Lishen. It is predicted that the Chinese lithium ion battery industry will continuously grow, and the main factor is the expansion of new energy vehicle distribution by the Chinese government. The Chinese government is targeting accumulated distribution of 5 million new energy vehicles until 2020, and for that they are supporting all related industries such as materials, batteries, and automobiles. Other than that, demand will continuously increase due to solar power-linked ESS for generation, communication ESS built for high speed broadband networks, expansion of the smartphone market, application of lithium ion batteries on e-bikes, and expansion of the low-speed electric vehicle market.?

Especially the market for EV power batteries grew more than twice the volume in 2014 in 2015, it is also expected to grow more than two times in 2016.?

This report has researched supply volume in the Chinese secondary battery market per type of battery, and has especially researched and analyzed in detail the supply volume of power batteries for EV among lithium ion batteries with standing out growths. We have analyzed each producer's supply volume, production capacity, and supply



volumes per type of anode material and per type of EV linked to EV production volume. Then, we have analyzed demand of batteries along with the policy direction of the Chinese government.



Contents

1. CURRENT STATE OF CHINESE SECONDARY BATTERY SUPPLY

- 1.1 Current State of the Chinese Battery Market (Yearly Sales per Battery Type, 2012~2015)
- 1.2 Current State of the Chinese Battery Market (Yearly Sales Volume per Battery Type, 2012~2015)
- 1.3 Size of the Chinese Lithium Battery Market (2015)
- 1.4 Size of the Chinese Lithium Battery Market for Electric Vehicles (2015)
- 1.5 Supply Volume of Power Batteries for Electric Vehicles per Producer (2015)
- 1.6 Supply Volume of Power Batteries for Electric Vehicles per Producer (Comparison of 2014 and 2015)
- 1.7 Current State of Power Battery Producers (Number of Producers, Regions)
- 1.8 Power Battery Production Capacity (GWh)
- 1.9 Plans for Production Increase of Power Batteries (~2020)
- 1.10 Current Battery Supply per Cathode Material (2015)
- 1.11 Current Battery Supply per Cathode Material and per EV Type (2015)
- 1.12 Current Performances of Chinese Lithium Ion Secondary Battery Producers (Sales, 2013~2015)
- 1.13 Current Performances of Top Chinese Lithium Ion Secondary Battery Producers (Market Share in terms of Sales, 2015)
- 1.14 Current Performances of Top Chinese Lithium Ion Secondary Battery Producers (Sales, 2013~2015)
- 1.15 Current Performances of Producers of Lithium Ion Secondary Power Batteries for Electric Vehicles (Number of Vehicles, 2015)
- 1.16 Current Performances of Top Producers of Lithium Ion Secondary Power Batteries for Electric Vehicles (Number of Vehicles, 2015)
- 1.17 Current Performances of Top Producers of Lithium Ion Secondary Power Batteries for Electric Vehicles (Number of Vehicles, 2015)
- 1.18 Current Performances of Top Producers of Lithium Ion Secondary Power Batteries for Electric Vehicles (Number of Vehicles, 2015)
- 1.19 Application Rate of Ternary Lithium Ion Secondary Power Batteries (Number of Passenger Cars, 2015)
- 1.20 Application Rate of LFP Lithium Ion Secondary Power Batteries (Number of Passenger Cars, 2015)

2. CURRENT STATE OF CHINESE SECONDARY BATTERY DEMAND



- 2.1 Expansion of Distribution of New Energy Vehicles
- 2.2 Distribution Volume of New Energy Vehicles in 2015
- 2.3 Monthly Production of Electric Vehicles (2015)
- 2.4 Reasons for Distribution of New Energy Vehicles
- 2.5 Environmental Pollution
- 2.6 Import of Energy
- 2.7 Plans for Development of the New Energy Vehicle Industry
- 2.8 Increase in Vehicle Production and Distribution
- 2.9 Demand for Power Batteries for Electric Vehicles
- 2.10 ESS for Power Generation Linked to New and Renewable Energy Generation
- 2.11 Demand for ESS for Communications due to Construction of High Speed Broadband Networks
- 2.12 Expansion of the Smartphone Market
- 2.13 Acceleration of Replacement of Lead Storage Batteries for E-Bikes with Lithium Ion Batteries
- 2.14 Potential of the Low Speed Electric Vehicle Market

3. ANALYSIS OF THE CHINESE LITHIUM ION SECONDARY BATTERY INDUSTRY

- 3.1 Main Challenging Factors of the Chinese Secondary Battery Industry
- 3.2 Improvement Directions in Manufacturing
- 3.3 Improvement Directions in Technology
- 3.4 Financial Support Policies for New Energy Vehicle Distribution (Central Government)
- 3.5 Financial Support Policies for New Energy Vehicle Distribution (Regional Governments)
- 3.6 Test GB/T Power Batteries Need to Pass
- 3.7 List of Model Producers of Secondary Batteries in the First Half of 2016
- 3.8 Policy Directions for the Chinese Secondary Battery Industry

4. CURRENT STATE OF CHINESE LITHIUM ION SECONDARY PRODUCERS (2014)

- 4.1 Current Performances of Chinese Lithium Ion Secondary Battery Packages
- 4.2 Current Productions of Chinese Lithium Ion Secondary Battery Materials
- 4.3 Sales of Chinese Lithium Ion Secondary Battery Cathode Materials
- 4.4 Current Performances of Chinese Lithium Ion Secondary Battery Cathode Material Producers
- 4.5 Current Performances of Top Chinese Lithium Ion Secondary Battery Anode Material Producers



- 4.6 Current Performances of Chinese Lithium Ion Secondary Battery Electrolyte Producers
- 4.7 Current Performances of Chinese Lithium Ion Secondary Battery Separator Producers
- 4.8 Current Performances of Chinese Lithium Ion Secondary Battery Equipment Producers

5. CURRENT STATE OF PRODUCERS OF OTHER SECONDARY BATTERIES IN CHINA (2014)

- 5.1. Current Performances of Chinese Lead Storage Battery Producers
- 5.2. Current Performances of Chinese Nickel Battery Producers
- 5.3. Current Performances of Chinese Lithium Primary Battery Producers
- 5.4. Current Performances of Chinese Zinc, Manganese, and Alkali Battery Producers



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