

Global LIB Market Status and Forecast for IT Application

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Abstracts

The total shipment of IT LIB reached 5,054 million cells in 2013 from 4,911 million cells in 2012. The year on year growth slowed to 2.9% in 2013 from 8.5% in 2012. The reason for the slow growth was the market saturation of smartphones which started during 2013.

The IT LIB market was slow in general in 2013, however the two key factors are expected to have a big impact on the industry. The first is the TESLA Effect and the second is the continuous growth of Tablet PC (including low cost White Box in China). TESLA is expected to sell 21,000 vehicles in 2013 and the amount of cylindrical battery which Panasonic of Japan supplied is expected to reach 180 million cells. Supporting a positive market view, 110,500 vehicles of Model S and Model X are expected to be sold in 2015 and 834 million cells of battery are to be supplied.

In 2013, ATL and LISHEN increased their supply of small IT batteries to Apple. BYD together with LISHEN also increased their supply to Samsung Mobile. As smartphone companies of China such as Lenovo, Huawei, ZTE, CoolPad and Xiami continue their growth, battery companies which were previously Tier 2 are becoming Tier 1. Coslight is a good example of such company. The White Box market in China is affecting the Tablet PC market and providing the foundation for the local battery companies of China to grow.

SONY of Japan is showing signs of recovery. The company has increased their battery supply to Apple and also to SONY. Panasonic which ranked the third in market share for small-size IT battery following LG Chemical has supplied 180 million battery cells to TESLA in 2013 and in the next year is expected to increase their total supply to a minimum of 3~4 hundred million cells. The company is to change from deficit to surplus

in 3Q of 2014 for small-size IT battery.

As a conclusion, in 2013, Samsung and LG Chemical of Korea showed good performance for customer acquisition, shipment and operating profit and Panasonic and SONY of Japan showed clear signs of recovery for cylindrical battery and polymer battery respectively.

ATL and LISHEN which continued growth from 2010 to 2012 have increased their shipment slightly but the operating profits are expected to decrease below 3.5%. Coslight which started as a 2nd tier grew annually by 50% and became a 1st tier company. The company is expected to continue to grow in 2014. More than 20 2nd tier companies with similar potential are located in Guangdong province of China.

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