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# World Batteries

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Industry Study with Forecasts for **2012 & 2017**

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Study #2375 | October 2008 | \$6100 | 502 pages

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**The Freedonia Group**

767 Beta Drive

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Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

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*Growth in battery demand will be supported by a continued healthy market for battery-powered electronic products, ongoing industrialization efforts and strong growth in motor vehicle production.*

## Global demand to increase 4.8% yearly through 2012

Worldwide primary and secondary battery demand will increase 4.8 percent annually to almost \$90 billion in 2012. China will record the largest gains of any national market and will account for more than half of the total global increase in battery demand through 2012. Demand for batteries in China will rise 13.3 percent annually and surpass the US to become the largest market in the world. Growth will be supported by continued strong demand for battery-powered electronic products, ongoing industrialization efforts and strong growth in motor vehicle production. Increases are also expected to be particularly strong in India, with above average growth in Indonesia, Mexico, Poland and South Korea. In contrast, demand in the US, Western Europe and Japan will rise much less rapidly through 2012. Still, aggregate battery demand in these Triad countries will increase a total of nearly \$3 billion, presenting significant opportunities for battery manufacturers.

## Consumer battery market to be fastest growing

Consumer battery demand will outperform the battery market as a whole, supported by generally favorable global economic conditions and by rising personal income levels in developing areas. Demand for batteries used in industrial and other applications will rise strongly, stimulated by solid though

Asia/Pacific  
40%

North America  
24%

Western Europe  
21%

Other Regions  
15%

## World Battery Demand, 2007 (\$70.9 billion)



moderating increases in fixed investment spending and total manufacturing output, particularly in developing areas. Automotive battery demand will rise less rapidly, restrained by a high degree of maturity in most developed nations and price competition among major suppliers. Still, the development of hybrid and electric vehicles will provide opportunities in this market.

## Non-lead-acid secondary batteries to lead gains

Non-lead-acid secondary battery market gains will outpace demand for primary and lead-acid secondary batteries through 2012. Sales of lithium ion and lithium polymer batteries and, to a lesser

extent, nickel-metal hydride batteries will be spurred by the immense popularity of electronic devices such as cell phones and portable digital audio players. The rapid growth in hybrid vehicle production will also support demand for these batteries. Primary battery demand will benefit from increased use of electrical and electronic products traditionally powered by these batteries and the ongoing conversion from basic, lower-cost zinc-carbon and zinc-chloride dry cells to more advanced, higher-priced alkaline and lithium types, especially in developing regions. In contrast, lead-acid batteries will see only modest growth, constrained by competition from nickel-metal hydride and lithium-based batteries in a number of applications.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Primary Battery Outlook & Suppliers --

primary batteries in India will grow 10% in 2012, slowing from the 2009 growth of 15%. Both the regional and global average will be boosted by additional increases in average income as efforts continue, bolstering sales of mobile devices and related primary batteries. There is strong growth in more expensive alkaline and lithium batteries which will boost value gains. However, inexpensive zinc-carbon and zinc-chloride cells will continue to account for the vast majority of primary battery demand in India, given the price consciousness of most battery consumers. In fact, growth for zinc-carbon and zinc-chloride batteries, while well below overall primary battery demand, will be among the fastest for any region of the world. Because they are so inexpensive, solid increases will prevent even faster gains in the primary battery market as a whole.

**SAMPLE  
TEXT**

Eveready Industries India, which is not affiliated with Energizer of the US, is the leading producer of primary batteries in India and supplies nearly half of the total Indian market for primary batteries. The company sells batteries through approximately 15 sales offices in India and through a network of about 4,000 distributors. Reflecting the importance of zinc-carbon and zinc-chloride batteries in the country, Eveready Industries India is one of the world's leading producers of these batteries, manufacturing more than one billion zinc-carbon batteries annually. Japan's Matsushita is also active in the Indian primary battery market through its Panasonic Battery India and Nippo Battery subsidiaries, which produce manganese batteries.

255

Copyright 2008

TABLE VI-14

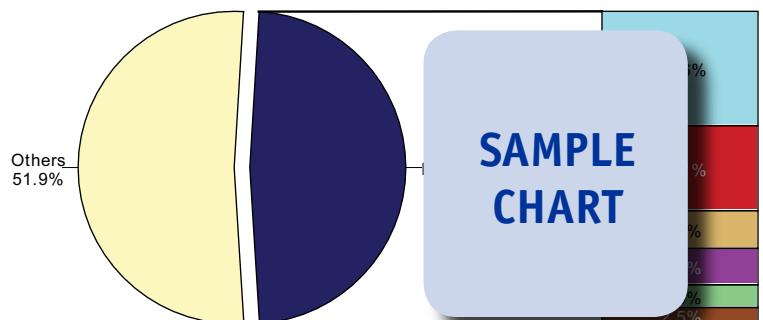
### INDIA PRIMARY BATTERY DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Population (million persons)					
Gross Fixed Investment (bil 2006\$)					
\$ consumer batteries/capita					
\$ industrial & other bat/000\$ GFI					
Primary Battery Demand					
By Market:					
Consumer					
Industrial & Other					
By Type:					
Alkaline					
Zinc-Carbon/Zinc-Chloride					
Lithium					
Other					
% primary	41.3	37.8	31.8	30.0	26.7

**SAMPLE  
TABLE**

CHART VIII-3

### WORLD LEAD-ACID BATTERY MARKET SHARE BY COMPANY, 2007 (\$27.5 billion)



## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Eveready Industries India Limited

Jeevan Deep Building  
 One Middleton Street  
 Kolkata, West Bengal 700 071  
 India  
 91-33-2288 2050  
 http://www

Sales: \$  
 Geograph  
 Countries  
 Employe

Key Pro... batteries, and recharge-  
 able nick... batteries

Eveready Industries India is a manufacturer of batteries, flashlights, mosquito repellents and packet tea. The Company is owned by Williamson Magor Group (India).

The Company is one of the world's largest producers of zinc-carbon batteries, producing over one billion units per year. In addition to zinc-carbon batteries, Eveready produces and markets rechargeable nickel-metal hydride (Ni-MH) and nickel-cadmium (Ni-Cad) batteries. The Company's EVEREADY zinc-carbon batteries are available in D, C, AA and AAA sizes in heavy-duty, multipurpose, super heavy-duty and alkaline varieties. These dry cell batteries are suitable for use in flashlights, tape recorders, radios, toys, personal stereos and other items. Eveready's rechargeable batteries, which are sold under the EVEREADY RECHARGE brand name, can be recharged up to 1,000 times. Batteries in this range include Ni-MH AA and AAA models. A representative series of Ni-MH rechargeable batteries is the 2100

**SAMPLE  
PROFILE**

TABLE VI-13

### INDIA BATTERY SUPPLY & DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2006\$)	1				40
\$ GDP/capita	1				40
Population (million persons)					35
\$ batteries/000\$ GDP	0				52
\$ batteries/capita					8
Battery Demand					30
Primary					70
Secondary					50
net exports					40
primary					50
secondary					90
Battery Shipments					20
Primary	207	295	450	550	820
Secondary	297	482	970	1370	2270

**SAMPLE  
TABLE**

"The market for rechargeable batteries in India is projected to increase 9.1 percent annually to \$1.6 billion in 2012, ahead of regional secondary battery demand and well above the global pace over the period. Secondary battery demand will be strong on virtually an across-the-board basis, fueled by rising consumer demand for high-drain electronic products like cell phones, climbing motor vehicle output and ownership rates, and increased manufacturing activity in general. In addition, rising production of all-electric city cars by local producer REVA Motors will provide opportunities for more advanced batteries in automotive applications. However, ..."  
 --Section VI, pg. 256-7

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**OTHER STUDIES**

**World Turbines**

Global turbine demand will rise 4.9% yearly through 2012. Gains in the large Chinese market will slow yet remain well above the average rate, with smaller developing markets growing even faster. Developed regions will also offer good opportunities. Aircraft engines will outpace the larger electric power generation market. This study analyzes the \$83.6 billion world turbine industry, with forecasts for 2012 and 2017 by product, application, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2315 ..... 06/2008..... \$5500

**Fuel Cells**

US commercial fuel cell demand will expand nearly sixfold through 2012 to \$975 million. Electric power generation will remain the largest market and grow 41% annually, bolstered by ongoing interest in less energy pollution and foreign dependency. Portable electronics will be the fastest growing market and benefit direct methanol fuel cells. This study analyzes the US fuel cell industry, with forecasts for 2012 and 2017 by product and market. It also reviews technology, evaluates market share and profiles major players.

#2328 ..... 04/2008..... \$4500

**World Biofuels**

Global demand for biofuels will grow 20% annually through 2011, despite concerns about their impact on the environment and food supplies. Bioethanol and biodiesel will lead gains. North America will remain dominant while the Asia/Pacific region and Western Europe grow faster. This study analyzes the 37.7 million metric ton world biofuel industry, with demand and production forecasts for 2011 and 2016 by fuel, world region and for 16 countries. It also evaluates market share and profiles major players.

#2287 ..... 03/2008..... \$5500

**Battery & Fuel Cell Materials**

US demand for battery and fuel cell materials will rise 4.4% per year through 2011. Growth will be driven by rising production of high-performance batteries (e.g., lithium, Ni-MH) and a nearly fivefold jump in fuel cell demand. Metals will stay the leading material while polymers and carbon/graphite lead gains. This study analyzes the US battery and fuel cell material industry, with forecasts for 2011 and 2016 by type, function and application. It also details company market share and profiles major players.

#2244 ..... 10/2007..... \$4400

**World Fuel Cells**

Global fuel cell spending (R&D, investment, sales) will grow 15% yearly through 2011. Portable electronics will be the fastest growing commercial use while electric power generation will stay the largest. Proton-exchange membrane fuel cells will remain dominant over other chemistries. This study analyzes the \$5.2 billion world fuel cell industry to 2011 and 2016 by product, chemistry, application, world region and for 14 countries. It also reviews technology, evaluates market share and profiles major players.

#2194 ..... 05/2007..... \$5500

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