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World Batteries

Industry Study with Forecasts for **2016 & 2021**

Study #2939 | October 2012 | \$6500 | 560 pages

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China will remain the largest market, bolstered by 12+ percent annual gains through 2016 as consumer electronics, electric bicycle, and motor vehicle output and use continue to climb.

World demand to rise 8.1% annually through 2016

World demand for primary and secondary batteries is forecast to rise 8.1 percent per year to \$132 billion in 2016. China will remain the largest national market for batteries, bolstered by an over 12 percent annual increase in product sales through 2016 as consumer electronics, electric bicycle, and motor vehicle output and use continue to climb. Battery demand in India will expand faster than in any other nation, as the nation's manufacturing base and personal incomes grow further. South Korea will also record strong market advances, driven by expanding motor vehicle and electronics output. Battery demand in Japan, the US, and Western Europe will rise at a rate below the world average through 2016, but suppliers in these markets will benefit from revitalized manufacturing industries and higher consumer spending.

Industrial & other market to be fastest growing

Battery sales to industrial and other markets will post the fastest gains of any market through 2016. Advances will be stimulated by increasing gross fixed investment, expanding global manufacturing output, and ongoing industrialization activity in developing nations. The automotive battery market will also record strong increases based on expanded output and use of conventional and hybrid motor vehicles. Consumer battery sales advances will

World Battery Demand, 2016 (\$132 billion)



also be strong. Rising incomes in developing nations will drive greater use of basic battery powered devices, while increased use of portable, high-drain electronics will fuel growth in the consumer market worldwide.

Secondary batteries to outpace primary types

Demand for secondary batteries is expected to rise at a faster rate than demand for primary types. Many common electronic devices (e.g., mobile phones, portable computers) utilize secondary batteries. In addition, use of grid storage systems to regulate electrical generation system output is expected to increase quickly, further bolstering secondary battery sales. Many of these

applications favor lithium or nickel-metal hydride battery types. Lithium-based secondary batteries are expected to register the fastest demand gains of any type of battery due to their high performance characteristics. Primary battery suppliers will see a shift away from low-cost, low-performing battery types toward higher output, more expensive primary batteries, which will contribute to value growth through 2016. Demand for these batteries will be spurred by greater use of devices traditionally powered by primary types (e.g., flashlights, electronic lanterns, clocks, radios) as income levels climb in developing nations. Increased utilization of other battery powered technologies, such as RFID tags, will also drive global sales growth.

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Sample Text, Table & Chart

ASIA/PACIFIC

In 1997, the South Korean government initiated an investment program designed to build a world-leading lithium ion battery in the nation. Investment by both government and private enterprise increased rapidly since the beginning of the program, and has led to growth in South Korea's battery output. The nation is a major exporter of secondary batteries, but does not have a large manufacturing base for primary batteries, and runs a small trade deficit in primary batteries. The local battery industry serves the country's large electronics manufacturing industry, along with its rapidly expanding automotive industry, leading to the emphasis on secondary battery production. Suppliers of primary batteries to South Korea include China, Indonesia, Thailand, and the US. Important trade partners for secondary batteries include Australia, China, Japan, and the US, as well as the nation's other regional neighbors, and several African and Eastern nations.

Demand for batteries in South Korea is projected to grow at a slower than the 2006-2011 and regional average rate. The South Korean battery market will exceed the regional market in terms of per capita battery demand for personal consumption electronics, many of which are replaced frequently, and the number of motor vehicles replaced, boosting the overall number of replacements needed for the South Korean motor vehicle park. Conversely, automotive manufacturers based in South Korea are flourishing, but are building new manufacturing production capacity in nations that are driving sales, such as the US. As a result, motor vehicle output gains will slow down between 2011 and 2016, reducing increases in battery demand from motor vehicle OEMs. The rate at which the electrical and electronics manufacturing industry expanded from 2006 to 2011 will not be going forward, further slowing gains.

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**SAMPLE
TEXT**

TABLE VII-12

SOUTH KOREA: SECONDARY BATTERY DEMAND (million dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)	45				
vehicles/000 persons					
Motor Vehicles in Use (million)	1				
Gross Fixed Investment (bil 2010\$)					
\$ automotive batteries/vehicle	1				
\$ consumer batteries/capita					
\$ indus & other batteries/mil \$ GFI					
Secondary Battery Demand					
By Type:					
Lead-Acid					
Lithium-Based					
Nickel-Based					
Other					
By Market:					
Automotive					
Consumer					
Industrial & Other					
% secondary	7				
South Korea Battery Demand	800	1,100	2,000	2,000	2,100

**SAMPLE
TABLE**

CHART IX-3

WORLD LEAD-ACID BATTERY MARKET SHARE, 2011 (\$37.3 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VII-11
SOUTH KOREA: PRIMARY BATTERY DEMAND
 (million dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)	45	46	47	48	49
Gross Fixed Investment (bil 2010\$)	15	16	17	18	19
\$ consumer batteries/capita	1	1	1	1	1
\$ indus & other batteries/mil \$ GFI	0	0	0	0	0
Primary Battery Demand					
By Type:					
Alkaline					
Zinc-Carbon/Zinc-Chloride					
Lithium					
Other					
By Market:					
Consumer					
Industrial & Other					
% primary					
South Korea Battery Demand					



COMPANY PROFILES

Acumuladores Moura SA

Rua Diário de Pernambuco, 195
 Tancredo Neves, Belo Jardim 55150
 Brazil
 55-81-3411-10
<http://www.moura.com.br>



Annual Sales:
 Employment:

Key Products: and stationary batteries

Acumuladores Moura produces lead acid automotive, traction, marine, and stationary batteries. The Company is privately held.

The Company's automotive batteries are available under the LOG DIESEL and INTELLIGENT BATTERY brand names. INTELLIGENT BATTERY products are designed to offer a 50 percent longer service life than conventional automotive batteries and feature a silver tin alloy in the positive plates to prevent corrosion. Acumuladores Moura's LOG DIESEL batteries, which are engineered to offer vibration resistance, can be employed in commercial trucks, buses, farming and earth moving machinery, power generation units, and diesel powered equipment, among other applications.

Traction batteries from Acumuladores Moura are sold under the MOURA LOG HDP brand name. Applications for these batteries include electric forklifts, pallet movers, and towing vehicles. The Company's MOURA BOAT marine batteries, which are used in boats for both starting and service applications, feature thick plates with dual

"Demand for primary batteries in South Korea is projected to grow at a 6.9 percent yearly pace to \$830 million in 2016, slowing from the gains posted in the 2006-2011 period, but about the same as gains in the region as a whole. The market will be driven by continuing improvement in per capita incomes, stimulating sales of devices such as personal electronics and toys. Also aiding in growth, battery consumers ..."

--Section VII, pg. 256

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OTHER STUDIES

World Lighting: Lamps & LEDs

World demand for lighting is projected to climb more than 12 percent annually through 2016 to \$78.3 billion. Market gains in developing countries will outpace sales in the US, Western Europe, and Japan. LED (or solid state) lighting devices will record by far the fastest global market gains. This study analyzes the \$43.9 billion global industry for lamps and LEDs used in lighting applications, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2979January 2013 \$6200

World Robots

Global robot demand will rise 10.5 percent annually through 2016 to \$20.2 billion. Five countries -- the US, Japan, Germany, China, and South Korea -- will continue to dominate demand, with the US remaining the largest national market. Smaller, less expensive service robots will outpace more sophisticated, high-value industrial and medical robots. This study analyzes the \$12.3 billion world robot industry, with forecasts for 2016 and 2021 by type, market, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2950December 2012 \$6100

Security Products

The US market for security products and systems is expected to increase 6.3 percent annually to \$19.9 billion in 2016. Electronic access control systems such as smart cards and biometrics, as well as mechanical and electromechanical locks, will post the fastest gains as new construction rebounds. The most rapid market growth will occur in the office and lodging segment. This study analyzes the \$14.6 billion US security product industry, forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2917 August 2012 \$5100

Batteries

US sales of primary and secondary batteries are expected to rise 4.8 percent annually through 2015. Secondary batteries will remain the dominant type and grow the fastest, led by rechargeable lithium batteries such as those used in hybrid and electric vehicles. Primary batteries will be driven by the dominant alkaline segment and by primary lithium batteries. This study analyzes the \$13.2 billion US battery industry, with forecasts for 2015 and 2020 by battery type and market. The study also evaluates company market share and profiles industry players.

#2781 September 2011 \$5100

World Fuel Cells

Global commercial fuel cell product and service demand will more than triple by 2015, and claim nearly half of all fuel cell spending (including R&D funding and investment) by 2020. Electric power generation will remain the largest application through 2015, while portable electronics and other uses will grow the fastest. This study analyzes the \$780 million world fuel cell industry, with forecasts for 2015 and 2020 by product, chemistry, application, world region and for 15 countries. The study also evaluates company market share and profiles major players.

#2769June 2011 \$6100

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