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# Batteries in China

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Industry Study with Forecasts for **2017 & 2022**

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Study #3030 | June 2013 | \$5300 | 267 pages

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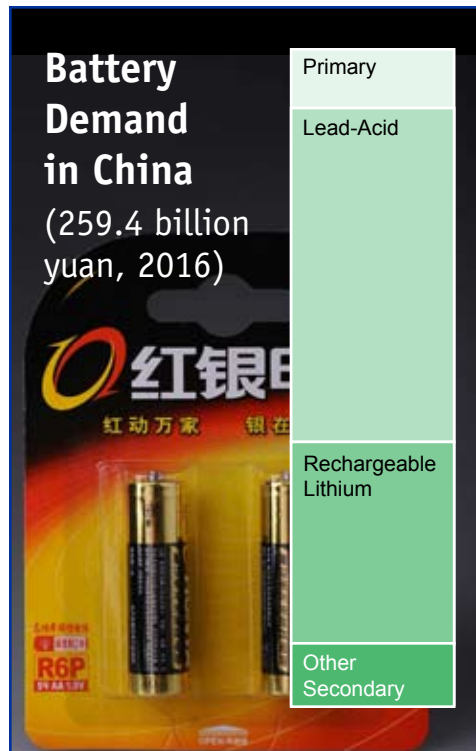
*Growth will be driven by a continuing shift toward higher-value secondary batteries, rising Chinese ownership of high-drain electronics, and expanding motor vehicle and electronics production.*

## Demand in China to rise 13% annually through 2016

Demand for batteries in China is forecast to increase 13.0 percent annually to ¥259.4 billion in 2016. Growth will be driven by a continuing shift in the product mix toward higher-value secondary batteries, rising ownership of high-drain electronic products by Chinese consumers, and expanding production of motor vehicles and electronics. The export of battery containing products -- in particular cellular phones, laptop computers, and other portable devices -- will further spur battery demand in China.

## Secondary batteries to outpace primary types

Demand for secondary batteries in China is projected to rise at a strong double-digit annual rate through 2016. Rechargeable lithium batteries will post the strongest growth, primarily driven by their superior performance attributes -- such as a higher power density ratio and longer product lifespan -- compared to competing chemistries. The expanding range of applications, continuing technological innovation, and decreasing prices will further boost gains. Lead-acid batteries will remain the largest segment, accounting for over half of the secondary battery market total in 2016. The transportation equipment market will be principally responsible for advances in secondary battery demand. Demand in this market will benefit from expanding production and a growing park of electric bicycles, motorcycles, and motor ve-



hicles. The portable devices battery market will increase nearly 12 percent annually through 2016. Gains will be supported by rising consumer electronics production and increasing exports.

## Alkaline batteries to remain key primary type

Sales of primary batteries will increase at a strong but slower annual rate than secondary batteries through 2016. Alkaline batteries will further strengthen their dominance in the primary battery market and continue to post the fastest gains at the expense of zinc-based battery demand growth. Alkaline batteries are favored for their greater power and longer lifespan than zinc-carbon/

chloride batteries. The consumer market will continue to be the dominant outlet for primary battery sales in China in 2016. Demand for primary batteries in the consumer segment will be fueled by increasing production of and domestic demand for home entertainment and portable devices and the introduction of new primary battery-powered portable devices.

## China maintains trade surplus in batteries

China maintains a trade surplus in batteries, with exports accounting for nearly 24 percent of battery shipments in 2011. About 11 percent of demand was satisfied by imports -- down from about 22 percent in 2006 -- highlighting the increasing self-sufficiency of the Chinese battery market. The majority of imported batteries feature more advanced technology, such as rechargeable lithium, while exported batteries generally include lower-cost products such as zinc-carbon/chloride, alkaline, and nickel-based batteries.

## Study Coverage

This industry study, *Batteries in China*, presents historical demand data for 2001, 2006 and 2011, and forecasts for 2016 and 2021 by product and market. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 40 industry participants.

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## Sample Text, Table & Chart

### PRIMARY BATTERY PRODUCTS

#### Primary Lithium

Demand for primary lithium batteries is forecast to rise annually through 2016 to ¥2 billion, a growing segment of all primary batteries. Demand will mainly include Lithium-Thionyl Chloride, Lithium-Iodine, and Lithium-Manganese. Most demand is projected to occur mainly in Li-SOCL<sub>2</sub> batteries used in calculators and gas meters, medical devices, and watches. Demand for Li-Ferrous and Li-Manganese batteries in applications such as calculators and watches -- is projected to see limited

Overall demand for lithium batteries will be fueled by improvements in energy density and longevity, leading to increased product use in a variety of applications such as computer monitors and PDAs. Also, an increase in production of primary lithium batteries in formats once the domain of more conventional battery chemistries such as zinc-carbon/alkaline will add to sales gains. For instance, Energizer's ULTIMATE Lithium batteries, which are used in digital cameras, shavers, instruments, and wireless microphones, can perform about five times longer than alkaline batteries or zinc-carbon/chloride batteries. However, modest increases in primary lithium battery prices, as well as the increasing competition from secondary batteries in applications such as cameras, will prohibit stronger gains.

The construction of primary lithium batteries involves a metal anode and an electrolyte of either organic solvent, inorganic or solid material. Among the common primary lithium batteries are thionyl chloride, sulfur dioxide, manganese dioxide, and state iodine. Primary lithium cells have a nominal voltage of 3.0V, that of zinc-based cells, and a total energy output as much as 10 times higher. Other benefits of primary lithium cells include their

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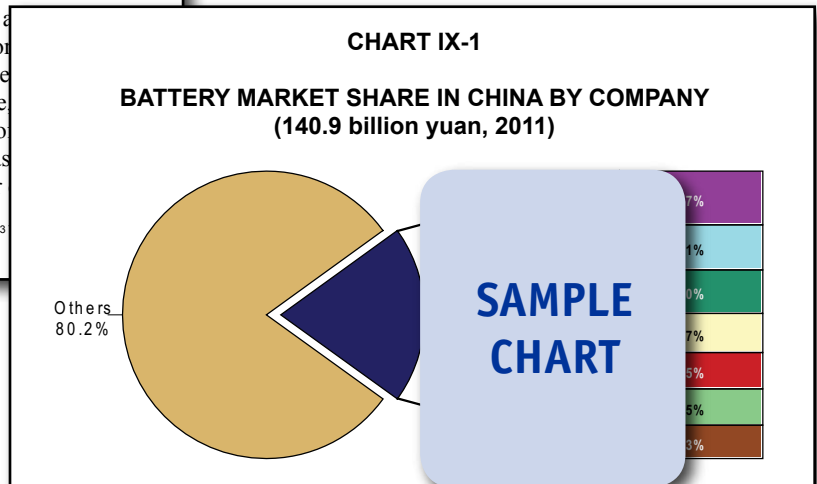
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**SAMPLE  
TEXT**

**TABLE VI-4**  
**GOVERNMENT PRIMARY BATTERY MARKET IN CHINA**  
 (million yuan)

Item	2002	2007	2012	2017	2022
Government Spending & Investment (billion yuan)	20	40	60	80	100
¥ batteries/mil ¥ govt spending	10	20	30	40	50
Government Primary Battery Market	2	4	6	8	10
By Application:					
Nondefense	1	2	3	4	5
Defense	1	2	3	4	5
By Chemistry:					
Alkaline	1	2	3	4	5
Zinc-Carbon/Chloride	1	2	3	4	5
Other Primary	1	2	3	4	5
% government Primary Battery Demand	3	5	7	9	11

**SAMPLE  
TABLE**

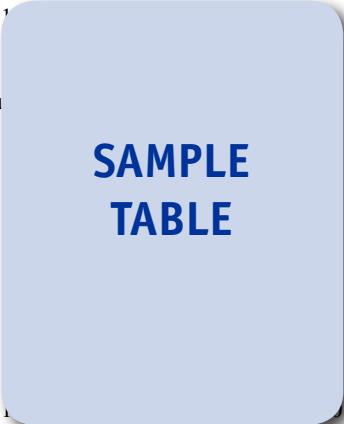


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VII-2**  
**LEAD-ACID BATTERY SUPPLY & DEMAND IN CHINA**  
 (million yuan)

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil 2010¥) / batteries/mil ¥ GDP					
Lead-Acid Battery Demand (million units) / ¥/unit					
Lead-Acid Battery Demand Starting/Lighting/Ignition Non-SLI					
net exports					
Lead-Acid Battery Shipments					
% lead-acid					
Secondary Battery Demand					



**COMPANY PROFILES**

**SCUD Group Limited**  
 No. 39, Kuaian Technology Zone  
 Mawei Economic and Technology Development Zone  
 Mawei, Fuzhou, Fujian 350015  
 China  
 86-591-8...  
 http://ww...

**SAMPLE PROFILE**

Sales: ¥...  
 Employe...  
 Key Pro... packs and lithium bare battery c...

SCUD Group is a manufacturer of rechargeable battery packs and related products for portable electronic products. The Company operates through four segments: Own-Brand Business, OEM Business, Bare Battery Cell Business, and Others.

The Company is involved in the Chinese battery industry through the Own-Brand Business, and Bare Battery Cell Business, and OEM Business segments. Via these segments, SCUD Group manufactures rechargeable lithium ion (Li-Ion) battery packs and lithium bare battery cells.

The Own-Brand Business segment generated 2011 sales of ¥915 million [US\$142 million]. Through this segment, the Company makes rechargeable Li-Ion battery packs, chargers, portable power supply kits, Bluetooth headsets, and related accessories under the CHAOTILONG and SCUD brand names. SCUD Group's SCUD and CHAOTILONG rechargeable Li-Ion battery packs are utilized primarily in mobile phones, but can also be used in notebook computers, digital cameras,

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**OTHER STUDIES**

**Recreational Vehicles**

The US recreational vehicle (RV) market is forecast to increase 4.8 percent annually to \$10.7 billion in 2017. Travel trailers will remain the largest product category, while motor homes and campers and camping trailers will be the fastest growing. The South and West regions will continue to lead sales and account for over three-quarters of all US demand. This study analyzes the \$8.5 billion US RV industry, with forecasts for 2017 and 2022 by product and regional market. The study also evaluates company market share and profiles industry players.

#3046 ..... August 2013 ..... \$4900

**Batteries**

US demand for primary and secondary batteries is expected to grow 4.2 percent per year to \$17.1 billion in 2017. Lithium batteries will offer the best growth opportunities in both the rechargeable and primary battery segments. Secondary batteries will continue to supplant primary batteries as high-drain electronic devices increase in popularity. This study analyzes the \$13.9 billion US battery industry, with forecasts for 2017 and 2022 by product and market. The study also reviews battery technology, evaluates company market share and profiles industry players.

#3075 ..... November 2013 ..... \$5300

**World Motorcycle Components**

World demand for motorcycle components, including those for electric bicycles (e-bikes) and motorcycles (e-cycles), will grow 7.5 percent annually to \$119.5 billion in 2017. Engine and drivetrain parts will remain the largest category, while tires will grow the fastest. The Asia/Pacific region will remain the dominant market. This study analyzes the \$83.2 billion world motorcycle component industry, with forecasts for 2017 and 2022 by market, product, world region, and for 20 countries. The study also evaluates company market share and profiles industry participants.

#3061 ..... August 2013 ..... \$5900

**Batteries in China**

Demand for batteries in China is forecast to increase 13.0 percent annually to 259 billion yuan in 2016. Secondary batteries will outpace primary types, led by the fast-growing rechargeable lithium batteries segment. The primary battery market will remain dominant, supported by the supplantation of zinc-carbon/chloride batteries by alkaline types. This study analyzes the 141 billion yuan battery industry in China, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry participants.

#3030 ..... June 2013 ..... \$5300

**Motorcycles in China**

Demand for motorcycles in China is projected to increase 5.5 percent per annum through 2016 to 57.7 million units. Electric motorcycles will outpace gas motorcycles, with mopeds the most popular electric model because they are faster than electric bicycles and cost less than scooters. This study analyzes the 44.1 million unit motorcycle industry in China, with forecasts for 2016 and 2021 by product, gas engine displacement, electric battery type, market and geographic region. The study also evaluates company market share and profiles industry participants.

#2988 ..... February 2013 ..... \$5400

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