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Battery Industry in China, 2005

Published on June 2005

Report Summary

The battery industry, based on new material technology, is associated with environment-friendly technology, electronics, electric power, communication and information industries. Adapting to the transformation of the consumption concepts like recreation, entertainment and health care, battery is also an industry connected to the implementation of a sustainable development strategy. It's an important part of new energies, and has become a new hotspot of the global economic development.

Presently China's battery industry is almost monopolized by foreign-funded companies. More than 50% of the large-scale enterprises are joint ventures or wholly owned by foreign enterprises (including HK, Macro, and Taiwan-based enterprises). Japanese capital takes the lion's share among foreign capitals in China; some are joint ventures co-invested/co-operated by domestic capital and Japanese capital, and some are Japanese-funded subsidiaries/holding companies or companies co-invested by domestic capitals in Taiwan.

Currently, except the battery separator, still depending on importation, the anode materials, cathode materials and electrolyte of the lithium ion battery can all get supply from the domestic market; the total production of solar battery already ranks in the world top 5, and combined network applications are still in the demonstration stage; fuel cells still can't be independently made in China, and the key materials still rely on importation. The environment-friendly green energies will get more attention in the next few years, and new material batteries will become the main force for developing new energy technology and improving energy production and utility efficiency. The government will also continue to support the R & D of new material batteries, using both policies and capital.

The production and sales of China's battery industry maintained a high-speed growth in 2004. With the recovery of the world economy, the import and export of our battery products has increased, but the international competition in battery market has also become more intense. China's battery manufacturers are far behind their foreign counterparts in terms of high and new technologies, thus technology will be a bottleneck restraining the development of China's battery manufacturing.

After having objectively analyzed the current status and development trends of the upstream and downstream industries of the battery industry chain and the state policies, and explored the development environment of the battery industry, we think that the products of battery industry's downstream industries such as mobile phone, laptop, digital camera/video, and automobile shows a strong development momentum; and the demand for new, efficient, environment-friendly batteries is enlarged; there is now a huge room for the battery market to develop.

According to the statistics of the National Bureau of Statistics, Customs General Administration of China, and China Machinery Industry Federation (CMIF), this report summarizes the situations of the world and China's battery industry of 2004, analyzes the market structure of battery products and characteristics of the supply and demand. The report also analyzes the major battery manufacturers' competitiveness from the view of production and sales capacity, credit capacity, operation capacity, profitability and development capacity; and forecasts the future development of the battery industry.

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