



Global and China Lithium Battery Equipment Industry Report, 2015-2018

Sep. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2014, China's lithium battery equipment market size (excluding imported equipment, the same below) ascended by 31.0% year on year to about RMB3.8 billion. Impacted by explosive development of the new energy vehicle market, CATL, Lishen, Guoxuan, BYD and other influential Chinese power lithium battery manufacturers have invested in production expansion, which is expected to further drive the growth in demand for lithium battery equipment. In 2018, China's lithium battery equipment market size will be up to RMB16.6 billion.

Traditional consumer electronics, power lithium batteries and grid energy storage act as major consumer markets of lithium battery equipment in China, accounting for 60%, 28% and 10% in 2014 respectively. Among them, power lithium batteries and grid energy storage will be major drivers prompting China's demand for lithium battery equipment, with the respective anticipated market share of 64% and 16% in 2018.

At present, China's lithium battery equipment market is featured with a low concentration rate. Japan HIRANO and Kaido are the top two lithium battery equipment producers in China, enjoying 9.0% and 7.8% market share in 2014 respectively; meanwhile, the leading local Chinese players -- Shenzhen New Katop Automation Technology Co., Ltd, Wuxi Lead Auto Equipment and Yinghe Technology only seized 18.7% market share together in 2014.

Wuxi Lead Auto Equipment: In 2015, the company raises funds to build a new-type automation equipment project to enhance its capacity in power lithium battery winding machine, digital lithium battery winding machine, lithium battery four-in-one molding machine.








Yinghe Technology: In 2015, the company raised funds to erect Huizhou Industrial Park (annual capacity: 700 sets of lithium battery automation equipment) and Jiangxi Industrial Park, of which the former has been successfully put into operation, while the latter will begin production in October 2015.

In addition, Youngy, Dalian Zhiyun Automation and lithium companies are also deploying the field of lithium battery equipment through capital increase or acquisition.

In June 2014, Youngy Co., Ltd. (formerly known as Luxiang) that specializes in lithium ore resources acquired Tec-rich Engineering (a famous Chinese reforming machine maker for RMB169 million in cash).

In March 2015, Dalian Zhiyun Automation took over 53.5948% stake in Geesun which is a lithium battery automation solution provider via equity acquirement and capital increase.

Revenue and Market Share of Major Chinese Lithium Battery Equipment Manufacturers, 2014

Company	Production Bases	Revenue[Market Share](RMB mln)
 KATOP 新嘉拓自动化	Shenzhen	365.8[7.6%]
 LEAD	Wuxi	306.5[6.4%]
	Shenzhen	225.0[4.7%]
	Shenzhen	175[3.6%]
 HONBRO 鸿宝科技	Dongguan	120.1[2.5%]
 浩能 HAONENG	Shenzhen	112.7[2.3%]
	Dongguan	97.6[2.0%]

Source: China Lithium Battery Equipment Industry Report, 2015-2018; ResearchInChina

In 2015, Chinese lithium battery equipment manufacturing enterprises witness rapid development. Wuxi Lead Auto Equipment, Yinghe Technology and other major Chinese peers have fortified their expansion and lifted market share.

The report mainly deals with the followings:

- ✘ Industrial environments, policies as well as international benchmarking enterprises of China lithium battery equipment industry;
- ✘ Size, product structure, supply and demand, competition patterns and so on of Chinese lithium battery equipment market;
- ✘ Influence of China's consumer electronics, energy storage, power batteries and other industries on the lithium battery equipment market;
- ✘ Operation and development strategies of 14 key Chinese lithium battery equipment enterprises;
- ✘ Development trend forecast for Chinese lithium battery equipment market in 2015-2018.

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