Comprehensive Edition 2012 - LIBs for IT Applications: Market Analysis and Forecast

Description: Jump up of lithium polymer secondary batteries

2012 global lithium secondary battery shipments totaled 4911 million cells. Quarterly shipments were 1140 million cells in the first quarter, 1,250 million cells in the second quarter, 1,280 million cells in the third quarter, and 1,250 million cells in the fourth quarter.

Although the market was expected to grow between 3Q and 4Q, which belong to the peak season in the IT industry, the overall LIB shipments were actually flat, as demand for the cylindrical type decreased from 495 million cells in 3Q to 417 million cells in 4Q. This resulted from fierce competition between companies such as Panasonic, Samsung SDI, and LG Chem for increasing capacity of cylindrical batteries, and excessive investment in cylindrical and prismatic batteries, which are relatively standardized and allow employing automation to the fullest, as an attempt to reduce labor costs. While the prismatic type had no major difficulties, creating new demand continuously through smart phone applications such as Samsung Galaxy Series, demand for the cylindrical type continued to decrease. Thus, related companies are striving to create new applications. On the other hand, Chinese LIB manufacturers such as ATL, Lishen, Coslight, and B&K, which have focused on production of and investment in the polymer type, are enjoying the current market situation.

The market share of the polymer type increased from 242 million cells in 1Q of 2012 to 328 million in 4Q of 2012, and is expected to reach 33.4% of the entire demand for IT applications. Based on the shipment amount, this corresponds to 53.1%. This is because the polymer type is shifting toward high capacity, and consequentially the unit cell price is higher than those of the cylindrical and the prismatic type. Thus, the biggest issues of LIB manufacturers worldwide are to operate products lines and make investments to meet the increasing demand for polymer batteries, and find new applications for cylindrical batteries to make up for the decreasing demand.

Samsung vs. LG Chem: Two-Top System in LIB industry
In 2012 Samsung SDI maintained its number one position with its market share of 22.4% in the global LIB market, followed by Panasonic with 16.3%, LG Chem with 14.8%, and Sony with 7..2%. Samsung SDI?ï¿½s top position seems to be impregnable for the present. Although Samsung was eliminated from the supplier list for Apple iPhone5, it was not a big deal due to the explosive growth of Galaxy S3 and Note2. On a quarterly basis, the company is maintaining its market share of more than 22%. Japanese LIB manufacturers such as Panasonic and Sony are losing their growth engines in the LIB market with decreasing market shares. While these Japanese LIB manufacturers are showing poor records, such companies such as ATL and Lishen as well as LG Chem are increasing their market shares. In terms of quarterly market shares, while LG Chem, ATL, and Lishen are showing steady growth, Panasonic, Sony, and Maxwell are showing signs of stagnation or decline. Japanese companies might continue to lose their market shares in the small LIB market, unless they turn the tide in the ESS and xEV market.

LC Chem is gradually growing despite the oversupply in the LIB market in 2012. Especially, the company was on a par with Panasonic in terms of market share, accounting for 15.3%, and is expected to surpass Panasonic, ranking second among global LIB suppliers between 2013-1Q and 2Q,. Considering positive signs in the smart phone market such as the increasing market share of LG Electronics, the Korean Companies are expected to rank first and second in the global market.

Crisis and Opportunity for Chinese manufacturers
The leading Chinese companies, ATL and Lishen, ranked 6th and 7th with the market shares of 4.9% and 4.6% respectively in 2012 global LIB market.
Although BYD took 5th place with the market share of 5.32% in the global LIB market, it is one step behind ATL and Lishen in terms of competitiveness in the small LIB market; 91.4% of its overall shipments, for instance, were occupied by low-cost prismatic types. On a quarterly basis, the company shipped 68 million cells in 3Q and 67 million cells in 4Q. The company also ranked second after Samsung SDI among suppliers for Samsung HHP batteries

As for quarterly shipments of ATL, the company showed a decrease in lithium polymer battery shipments from 58 million cells in 1Q to 45 million cells in 2Q, but an increase to 68 million cells from 3Q. This was because it could secure supply for iPhone5 and iPad Mini from 3Q.
Lishen is the only Chinese company which shows stable growth through supply of prismatic and polymer batteries to Samsung and Apple. It shipped 57 million cells in 2Q and 68 million cells in 3Q.

Although ATL and Lishen were selected as suppliers for iPhone5 in 2012 (Samsung SDI and LG Chem were excluded from the list), and showed an upward trend in quarterly shipments, both companies are expected to take the big hit with a decrease in the market share of Apple due to fierce competition in 2013 smart-phone and tablet markets. However, the world?ï¿½s biggest IT company, Samsung Electronics, is expected to continue to maintain its clients including Samsung SDI, and this will be an opportunity for BYD, Lishen, and ATD to minimize risks by diversifying client portfolios.
In addition, as Chinese IT companies, such as Lenovo, Huawei, and ZTE, are increasing their market shares in the global smart-phone market, this will be opportunity for these LIB manufacturers to take a leap to a higher level.

This report provides in-depth analysis of the IT LIB market on a quarterly basis, as well as global LIB market forecast until 2016. In addition, it includes SCM of top 4 Taiwanese pack manufacturers and forecasts of prices of the cylindrical type, which is the most widely used LIB.

This report features
- Quarterly shipment analysis by country/manufacturer/application [2012 1Q ~ 4Q(E)]
- Analysis of shipments of each manufacturer by application and client [2012 1Q ~ 4Q(E)]
- Shipment analysis of major applicants by manufacturer and client [2012 1Q ~ 4Q(E)]
- Analysis of supply chains for Top 4 Chinese packers [2012 1Q ~ 3Q]
- Global LIB market analysis and forecast (IT, xEV, ESS) [2011~2016F]
- Analysis of prices of cylindrical 15650 LIBs [2010 1Q ~ 2012 4Q(E)]

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