

## **Lithium Ion Batteries Market in Japan: Key Research Findings 2011**

### ◆ Research Outline

**Yano Research Institute has conducted a study on the lithium ion batteries market with the following conditions:**

1. Research period: From June to November, 2011
2. Research targets: Manufacturers of Lithium Ion Batteries
3. Research methodologies: face-to-face interviews by the specialized researchers, survey via telephone/email, and literature research

### ◆ Key Findings

- **Global lithium ion batteries market in FY2011 shows steady growth at 1,169.3 billion yen, 108.2 % from the previous year**

The global market of lithium ion batteries (LIBs) in FY 2011 is likely to reach 1,169.3 billion yen, 108.2 % of the previous year, showing steady growth.

- **Most LIBs are currently for small consumer devices such as smart phones and tablet PCs, and those for cars are expected to increase gradually in time**

Once thought to be as already well matured, LIBs for consumers are still in good demand due to highly demanded smart phones and tablet PCs. LIBs for automobiles are also promising in the area of PHEVs and HEVs, which are alternatives to those yet-to-be-fully-launched EVs. Since volume of LIBs to be equipped in PHEVs and HEVs are huge compared to that in consumer products, LIBs for automobiles have potential to drive the entire LIBs market for expansion.

- **Market forecast : Average growth rate from FY2010 to FY2015 expected to be 21.7%, reaching 2,883.4 billion yen by FY2015**

The market of LIBs for automobiles is expected to launch gradually and anticipated to grow up to 952.0 billion yen, accounting for 33.0% of the entire LIBs market by FY2015. The Great East Japan Earthquake along with the nuclear accident at Fukushima have generated front-loaded demand for industrial LIBs, the market of which is expected to grow as large as 432.6 billion yen by FY2015, accounting for 15% of the entire LIBs market.

## ◆ Report format

Published report: "Lithium Ion Battery Market 2011"

Issued on: December 8, 2011

Language: Japanese

Format: 183 pages in A4 format

Price: 157,500 yen (7,500 yen of consumption tax shall be charged for the sales in Japan.)

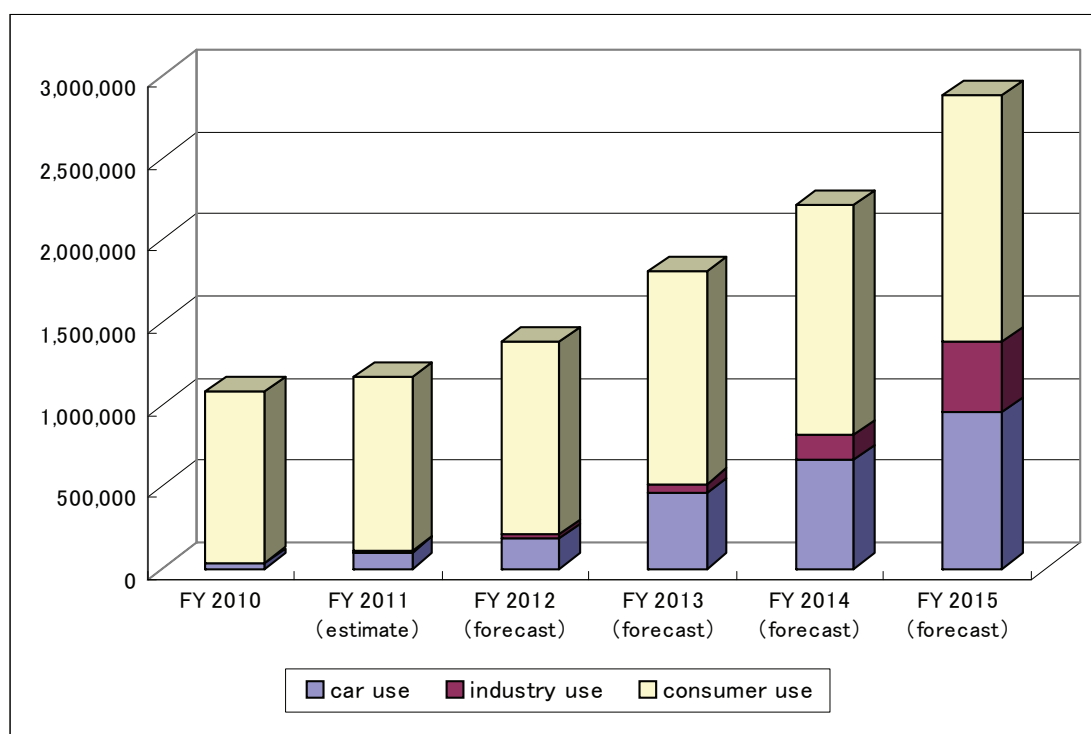
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■ **Figure 1: Transition of global LIB market size by use**



[estimated by Yano Research Institute]

	FY 2010		FY 2011 (estimate)		FY 2012 (forecast)		FY 2013 (forecast)		FY 2014 (forecast)		FY 2015 (forecast)	
		% share		% share		% share		% share		% share		% share
<b>consumer use</b>	1,043,589	96.6%	1,059,246	90.6%	1,175,763	85.3%	1,290,988	71.5%	1,400,722	63.3%	1,498,772	52.0%
y to y basis	-	-	101.5%	-	111.0%	-	109.8%	-	108.5%	-	107.0%	-
<b>industry use</b>	3,700	0.3%	10,500	0.9%	25,300	1.8%	60,000	3.3%	155,000	7.0%	432,600	15.0%
y to y basis	-	-	283.8%	-	241.0%	-	237.2%	-	258.3%	-	279.1%	-
<b>car use</b>	33,450	3.1%	99,650	8.5%	178,100	12.9%	454,890	25.2%	657,850	29.7%	952,080	33.0%
y to y basis	-	-	297.9%	-	178.7%	-	255.4%	-	144.6%	-	144.7%	-
<b>Total</b>	1,080,739	100.0%	1,169,396	100.0%	1,379,163	100.0%	1,805,878	100.0%	2,213,572	100.0%	2,883,452	100.0%
y to y basis	-	-	108.2%	-	117.9%	-	130.9%	-	122.6%	-	130.3%	-

Notes:

1. The figures are based on shipment values of manufacturers
2. Definitions of each application are as follows:
  - Small LIBs for consumers: LIBs for cell phones, Note PCs, mobile music players, digital cameras, digital video cameras, portable digital devices including portable game devices, electric power tools, electric motorcycle, electric bicycles, those for medical appliances and for aerospace, and etc.
  - Industrial LIBs: LIBs related to smart grid (LIBs that enables to balance adequate power operation by combining with wind power generation or solar power generation, so that electricity can be charged at a low load time and can be generated at peak time), LIBs for residence (mainly used as a battery in combination with a solar power generation system at residence), LIBs for industry (those for industrial machinery and for large automobiles), UPS (those used mainly as a method to cope with blackout at factories and communication stations).
  - LIBs for automobiles: LIBs for standard sized automobiles. Those for buses, construction machines and railway cars are included in industrial LIBs.