



Information for growth

## THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020

### 19<sup>TH</sup> EDITION – MARCH 2010

(Main report >230 PAGES)

#### INTRODUCTION

1. KEY ISSUES
2. METHODOLOGY
3. COMPARISON WITH OTHER CONSULTANTS

#### 1. PART I: THE RECHARGEABLE BATTERY MARKET IN 2009

##### 1. 1995 - 2009 RECHARGEABLE BATTERY MARKET

- WORLDWIDE RECHARGEABLE BATTERY SALES BY CHEMISTRY, UNITS (M CELLS), 1995 - 2009
- WORLDWIDE RECHARGEABLE BATTERY MARKET BY CHEMISTRY, M\$, 1995-2009

##### 2. NiCd, NiMH, Li-ION AND LITHIUM POLYMER MAIN CHARACTERISTICS

- NiCd, NiMH, Li-ION MAIN CHARACTERISTICS
- NiCd, NiMH & Li-ION PRODUCT PERFORMANCES : Wh/Kg & Wh/L
- ADVANTAGES OF EACH BATTERY TECHNOLOGY

##### 3. BATTERY SUPPLIERS' MARKET SHARES IN 2009

- JAPANESE, CHINESE & KOREAN MARKET SHARE, IN VALUE, 2009
- MARKET SHARE IN VALUE & GROWTH 2008/2009 FOR JAPAN, CHINA & KOREAN BATTERY INDUSTRY
- NiCd BATTERY: MARKET SHARE IN 2009 IN VOLUME & VALUE WORLDWIDE
- NiMH BATTERY: MARKET SHARE IN 2009 IN VOLUME & VALUE WORLDWIDE
- Li-ION & POLYMER BATTERY: MARKET SHARE IN 2009 IN VOLUME & VALUE WORLDWIDE
- Li-ION CYLINDRICAL: MARKET SHARE IN 2009 IN VOLUME & VALUE WORLDWIDE
- Li-ION PRISMATIC & POL: MARKET SHARE IN 2009 IN VOLUME & VALUE WORLDWIDE
- MARKET SHARE IN VALUE, GROWTH 2008-2009 & MARKET VALUE FOR NiCd, NiMH & Li-ION BUSINESS
- MAJOR Li-ION MANUFACTURERS QUARTERLY PRODUCTION 2001-2009: SONY, SANYO, MBI, SANYO GS, NEC, MAXELL, BYD, LG CHEM, SDI, LISHEN
- MAJOR Li-ION MANUFACTURERS QUARTERLY PRODUCTION 2001-2009: SONY, SANYO, MBI, SANYO GS, NEC, MAXELL, BYD, LG CHEM, SDI, LISHEN
- Li-ION MANUFACTURERS YEARLY PRODUCTION (M CELLS / YEAR) FOR Li-ION CYLINDRICAL, Li-ION PRISMATIC & LITHIUM POLYMER: SONY, SANYO, MBI, SANYO GS, NEC, MAXELL, BYD, LG CHEM, SDI, LISHEN & OTHERS
- BATTERY MAKERS: 2009 SALES IN M CELLS BY CHEMISTRY: : SONY, SANYO, MBI, SANYO GS, NEC, MAXELL, BYD, LG CHEM, SDI, LISHEN, YUASA DELTA, GOLD PEAK,
- BATTERY MAKERS: 2009 SALES IN M \$ BY CHEMISTRY: : SONY, SANYO, MBI, SANYO GS, NEC, MAXELL, BYD, LG CHEM, SDI, LISHEN, YUASA DELTA, GOLD PEAK,
- BATTERY INDUSTRY IN 2009: NiCd, NiMH & Li-ION COMPETITORS MARKET SHARE IN VALUE
- FOCUS ON THE LEADERS' STRATEGY

- SANYO IN 2009
  - RANK, MAIN CUSTOMERS, INVESTMENT,
  - FACTORIES LOCATION
  - LI-ION CELLS PRODUCTION CAPACITY, 2004 Q4 – 2009 Q4 (M CELLS PER MONTH)
- CHINESE & KOREAN MAKERS
- CHINESE MAKERS STRENGTHS
- CHINESE MAKERS WEAKNESSES
- CHINESE BATTERY MARKETS: CELLULAR PHONES, POWER TOOLS
- EXAMPLE OF LISHEN
  - AUTOMATIC LINE
  - PRODUCTION CAPACITY BY CELL SIZE IN 2009
- CHINA IN THE WORLDWIDE RECHARGEABLE BATTERY PRODUCTION
  - CHINA MARKET SHARE IN VOLUME FOR NiCd IN 2009
  - CHINA MARKET SHARE IN VOLUME FOR NiMH IN 2009
  - CHINA MARKET SHARE IN VOLUME FOR LI-ION IN 2009
  - CHINA MARKET SHARE FOR BATTERIES IN VALUE IN 2009

#### 4. MAIN APPLICATIONS IN 2009

- KEY MARKETS FOR NiCd IN 2009: POWER TOOLS, RC/CARS & TOYS, HOUSEHOLD DEVICES, SECURITY LIGHTING, E-BIKES VALUE (M\$)
- KEY MARKETS FOR NiMH FROM 2001 TO 2009: WEIGHT OF CELLULAR PHONES & OTHER APPLICATIONS
- NiMH BATTERY MAIN APPLICATION IN 2008 & 2009 IN VALUE: HEV, RETAIL, POWER TOOLS, CORDLESS PHONES,
- LI-ION & POLYMER BATTERY SALES BY APPLICATION, IN VOLUME (M CELLS), WORLDWIDE, 2000-2009: CELLULAR PHONES, PORTABLE PCS, CAMCORDERS, DIGITAL CAMERAS, POWER TOOLS, MP3, VIDEO GAMES,
- LI-ION & POLYMER BATTERY SALES BY APPLICATION, IN VALUE (M \$), WORLDWIDE, 2000-2009: CELLULAR PHONES, PORTABLE PCS, CAMCORDERS, DIGITAL CAMERAS, POWER TOOLS, MP3, VIDEO GAMES,

### 1. PART 2: TECHNICAL, ECONOMICAL & REGULATION TRENDS

#### 1. RAW MATERIALS TRENDS

- RAW MATERIALS IN THE BATTERY BUSINESS
  - PRODUCTION COST FOR JAPANESE, CHINESE & KOREAN MAKERS FOR 543450 CELL IN Q4-2009
  - PROFIT LEVEL COMPARE TO COBALT PRICE ON A QUARTERLY BASIS FROM 2008 TO 2009
  - COBALT & NICKEL PRICE IN \$/KG FROM 2003 TO 2009
  - NiMH BATTERY PERFORMANCES (CAPACITY IN MAH) 1998-2009
  - LI-ION BATTERY PERFORMANCES (ENERGY DENSITY IN Wh/L & Wh/KG) 1994-2009
  - MAIN BATTERY MAKERS (SANYO, SONY, MBI, SDI & LG) ROADMAP 2008-2009-2010 FOR THEIR HIGH CAPACITY CYLINDRICAL LI-ION PRODUCTS
- CATHODE ACTIVE MATERIAL FOR LI-ION
  - EXAMPLES OF NEW LI-ION CELLS PRODUCED IN 2009, CATHODE & ANODE CHARACTERISTICS
  - MAJOR AXES OF DEVELOPMENT FOR NEW CATHODES:  $\text{LiMn}_2\text{O}_4$ ,  $\text{LiFePO}_3$ ,  $\text{Li}[\text{Ni}_x\text{Mn}_y\text{Co}_z]\text{O}_2$ ,  $\text{Li}[\text{Ni}_x\text{Co}_y\text{MnAl}]\text{O}_2$  (NCA-NCM)
  - SPECIFIC CAPACITY (MAH/G) & DISCHARGE VOLTAGE FOR DIFFERENT CATHODE ACTIVE MATERIAL
  - $\text{LiCoO}_2$ ,  $\text{LiMn}_2\text{O}_4$ ,  $\text{LiFePO}_3$ ,  $\text{Li}[\text{Ni}_x\text{Mn}_y\text{Co}_z]\text{O}_2$ ,  $\text{Li}[\text{Ni}_x\text{Co}_y\text{MnAl}]\text{O}_2$  (NCA-NCM) MAIN CHARACTERISTICS
  - COBALT NEEDS (TONS) FOR NiCd, NiMH & LI-ION BATTERIES
  - COBALT DEMAND WORLDWIDE (TONS) 2000-2009,
  - COBALT DEMAND WORLDWIDE (TONS) 2000-2009, BY APPLICATION
  - COBALT CONSUMPTION IN 2008 & 2009 BY APPLICATION: BATTERIES, SUPPER ALLOYS, CHEMICAL, PIGMENTS, DIAMOND TOOLS, HARD METAL, MAGNETS,

- NICKEL CONSUMPTION IN 2009 BY APPLICATION: INDUSTRIALS, TRANSPORT, COMMERCIAL, BATTERIES,
- CATHODE ACTIVE MATERIAL NEEDS FOR CYLINDRICAL & PRISMATIC LI-ION BATTERIES, TONS, 2000-2009,
- CATHODE ACTIVE MATERIAL NEEDS, TONS, 2000-2009, FOR  $\text{LiCoO}_2$ ,  $\text{LiMn}_2\text{O}_4$ ,  $\text{LiFePO}_3$ ,  $\text{Li}[\text{Ni}_x\text{Mn}_y\text{Co}_z]\text{O}_2$ ,  $\text{Li}[\text{Ni}_x\text{Co}_z\text{MnAl}]\text{O}_2$  (NCA-NCM)
- CATHODE ACTIVE MATERIAL NEEDS (% & TONS) FOR EACH BATTERY MAKERS: SANYO, SONY, MBI, SDI, LGC, LISHEN, SGS, NEC, MAXELL, E-ONE
- CATHODE ACTIVE MATERIAL SUPPLIERS MARKET SHARE: AI23, BYD, CHEMETAL, FMC LITHIUM, MATSUSHITA, MITSUI MINING, MITSUI ZOZEN, NICHIA CORP, NIKKI CHEMICAL, NIPPON CHEMICAL, NIPPON DENKO, PHOSTECH/SUD-CHEMIE, SEIDO CHEM, SEIMI CHEMICAL, SONY (MIYAGI), SUMITOMO METAL MINING, TANAKA CHEM, TODA KOGYO CORP, TORONOX, UMICORE KOREA
  - a.  $\text{LiCoO}_2$  SUPPLIERS & THEIR CUSTOMERS
  - b.  $\text{LiMn}_2\text{O}_4$  SUPPLIERS & THEIR CUSTOMERS
  - c. NMC SUPPLIERS & THEIR CUSTOMERS
  - d. NCA/NCM SUPPLIERS & THEIR CUSTOMERS
  - e.  $\text{LiMPO}_4$  SUPPLIERS & THEIR CUSTOMERS
- CATHODE ACTIVE MATERIAL NEEDS FOR CYLINDRICAL & PRISMATIC LI-ION BATTERIES, TONS, 2000-2020,
- COBALT NEEDS FOR LI-ION CELLS, IN TONS, 2000-2020
- ANODE ACTIVE MATERIAL FOR LI-ION
  - ANODE ACTIVE MATERIALS SUPPLIERS FOR EACH BATTERY MAKER: HITACHI CHEMICAL, JFE CHEMICAL, KANSAI NETSU KAGAKU, MITSUBISHI CHEMICAL, MITSUI MINING, NIPPON CARBON, OSAKA GAS CHEMICAL, OTHERS, SHANSHAN TECH, SHENZHEN BTR, SUMITOMO METAL
  - ANODE ACTIVE MATERIALS SUPPLIERS MARKET SHARE, IN VOLUME
  - ANODE ACTIVE MATERIALS SPECIFIC CAPACITY & DISCHARGE VOLTAGE
  - ANODE DEVELOPMENTS FOR SANYO, SONY, MBI, SDI, LG
- SEPARATORS
  - SEPARATOR MARKET ( $\text{M m}^2$ ) 1995-2009
  - MAIN SUPPLIERS STRENGTH: TONEN, CELGARD, ASAHI,
  - SEPARATOR MAKERS & THEIR CUSTOMERS: TONEN, CELGARD, ASAHI, UBE, SUMITOMO, SK, ENTEK
  - SEPARATOR SUPPLIERS MARKET SHARE IN VOLUME
- ELECTROLYTE
  - ELECTROLYTE MARKET IN VOLUME (TONS / YEARS) 1995-2010
  - ELECTROLYTE SUPPLIERS MARKET SHARE IN VOLUME (2003-2009): UBE, KIEL, MITSUBISHI CHEMICAL, TOMIYAMA, ZHANGJIAGANG GUOTAI RONGHUA, BYD,
  - ELECTROLYTE MAKERS & THEIR CUSTOMERS
  - LIPF6 SUPPLIERS & THEIR CUSTOMER
  - LIPF6 MARKET (TONS) 1999-2009
- DEVELOPMENTS IN NANOSTRUCTURE MATERIALS

## 2. BATTERY SIZE & CAPACITY TRENDS

- 18650 CELLS BY CAPACITY IN 2008 & 2009
- CYLINDRICAL LI-ION CELL SIZE IN 2009
- 18650 CELLS CAPACITY 1Q2004-4Q 2009
- RATIO OF LI-ION CYLINDRICAL & PRISMATIC IN VOLUME (1997-2009)
- RATIO OF LI-ION CYLINDRICAL & PRISMATIC IN VALUE (1997-2009)
- POLYMER BATTERY FOCUS
  - STRENGTH & WEAKNESSES
  - LI-POLYMER PRODUCTS
  - LI-POLYMER CELLS DEMAND IN VOLUME (1998-2020)
  - LI-POLYMER CELLS DEMAND IN VALUE (1998-2020)

- LI-POLYMER CELLS DEMAND, IN VOLUME (M CELLS) 1998-2020, BY APPLICATION: CELLULAR, PORTABLE PCs, PDA, VIDEO GAMES, MP3, OTHERS
- LI-POLYMER CELLS DEMAND, IN VALUE (M \$) 1998-2020, BY APPLICATION: CELLULAR, PORTABLE PCs, PDA, VIDEO GAMES, MP3, OTHERS

### 3. SUBSTITUTION TECHNOLOGY: MICRO FUEL CELLS TRENDS

- FUEL CELLS PRINCIPLE & THEORY
  - PRINCIPLE
  - MAIN TYPES OF SMALL & MICRO FUEL CELLS
- SMALL & MICRO FUEL CELLS & BATTERY COMPARISON
  - STRENGTHS & WEAKNESSES COMPARE TO BATTERIES
  - MAIN TYPES OF SMALL & MICRO FUEL CELLS
  - ENERGY DENSITY OF BATTERIES & FUEL
  - SMALL & MICRO FUEL CELLS LAUNCH DELAYED
- SMALL & MICRO FUEL CELLS MAIN ACTORS
  - BIG COMPANIES
  - START-UP
  - RAW MATERIALS SUPPLIERS
  - R&D
  - MAIN TYPES OF SMALL & MICRO FUEL CELLS
  - ENERGY DENSITY OF BATTERIES & FUEL
- SMALL & MICRO FUEL CELLS MARKET FORECASTS UP TO 2010
  - SCENARIOS FOR SMALL FUEL CELLS MARKET IN 2010
  - MICRO FUEL CELLS: A NICHE MARKET BY 2010
  - WHAT ABOUT CARTRIDGE MARKET ?
- CONCLUSIONS ON SMALL & MICRO FUEL CELLS

### 4. ECONOMICAL TRENDS

- CELLS' AVERAGE PRICE IN 2009
  - NiCd, NiMH, Li-ION & Li-POLYMER AVERAGE CELLS PRICE IN 2009 (\$)
  - NiCd, NiMH, Li-ION CYLINDRICAL, Li-ION PRISMATIC & Li-POLYMER AVERAGE ENERGY PRICE IN 2009 (\$/Wh)
  - AVERAGE PRICE PER CELL BY CHEMISTRY 2000-2010: NiCd, NiMH, Li-ION, Li-POLYMER
  - DETAIL OF NiCd & NiMH PRICES PER SIZE IN 2009
    - a. NiCd: AAA, AA, C, SUB C, D & F SIZE
    - b. NiMH: AAA, AA, C, SUB C, D
  - AVERAGE PRICE PER CELL BY CHEMISTRY 2000-2010: NiCd, NiMH, Li-ION, Li-POLYMER (\$/Wh)
  - Li-ION 18650 PRICE DECREASE 1996-2009
  - Li-ION PRICE DECREASE 1996-2009
  - Li-ION CYLINDRICAL PRICE DECREASE 1996-2009
  - Li-ION PRISMATIC PRICE DECREASE 1996-2009
  - Li-ION POLYMER PRICE DECREASE 1996-2009
  - 18650 CELLS PRICE BY CAPACITY 1Q 2004 – 4Q 2009
  - PRISMATIC CELLS PRICE BY SIZE 1Q 2004 – 4Q 2009
  - PRISMATIC PRICES & PRODUCTION COST (MATERIAL, DEPRECIATION, R&D, LABOR, SGA, OPERATING PROFIT) FOR JAPANESE, KOREAN & CHINESE MAKERS
  - OPERATING PROFIT / REVENUES RATIO FOR MAIN Li-ION SUPPLIERS 2002 - 2009: SANYO, SONY, MBI, SDI, LG, BYD, SGS, NEC, MAXELL

**5. REGULATION TRENDS**

- BASIC CHEMICAL COMPOSITION OF PRIMARY & RECHARGEABLE BATTERIES
- NiCd REGULATION
  - TWO OPPOSING STANDS ON REGULATION
  - EUROPEAN COMMUNITY (DG XI)
  - EPBA: EUROPEAN PORTABLE BATTERY ASSOCIATION
  - NEW BATTERY DIRECTIVE MAIN IMPACTS ON BATTERIES BUSINESS
  - POSITIVE ASPECTS
  - NEGATIVE IMPACTS
- THE RoHS & WEEE DIRECTIVES
- THE NEW CHEMICALS POLICY « REACH »
- FUTURE BATTERY REGULATION IN EUROPE

**6. SAFETY ISSUES**

- SONY'S LI-ION BATTERY FAILURE
  - NUMBER OF PACK INVOLVED, BY PC MAKERS
  - MAJOR BRAND INVOLVED
  - REASON OF THE FAILURE
  - COST FOR SONY IN M\$
  - IMPACT ON OPERATIONAL PROFIT OF SONY GROUP
  - REAL ESTIMATED COST FOR SONY IN M\$ BY DIFFERENT SOURCES: SONY, GOLDMAN & SACHS, REUTERS, AVICENNE DEVELOPPEMENT
  - SONY: NUMBER OF CELLS SOLD 2003-2009 WORLDWIDE
  - SONY: NUMBER OF CELLS SOLD 2003-2009 FOR PORTABLE PCS WORLDWIDE
- SONY'S FAILURE IMPACT ON THE BATTERY BUSINESS
  - SONY MAIN CUSTOMERS IN 2009
  - NUMBER OF CELLS BOUGHT BY PC MAKERS TO SONY IN 2008 & IN 2009
  - DELL & TOSHIBA BATTERY SUPPLIERS IN 2008 & 2009
- LI-ION SAFETY ISSUES
  - MAIN ISSUES FOR LI-ION
  - INCIDENT WORLDWIDE 2000-2009
  - NEW INCIDENTS IN 2009
- MAJOR DEVELOPMENTS WORLDWIDE
  - THE IEEE STANDARDS ASSOCIATION
  - NEW CATHODE
  - ELECTROLYTE
  - NEW PRODUCT FROM MBI

**2. PART 3: FORECASTS UNTIL 2010 & 2020****1. PARAMETERS ANALYSIS (DETAIL IN THE FULL REPORT)**

- MAIN SEGMENT TRENDS: PORTABLE PCS, CELLULAR, ...
- POWER NEED TRENDS (VOLUME, WEIGHT, CAPACITY, RUNNING TIME)
- PENETRATION RATE FOR EACH CHEMISTRY
- 2010 & 2020 FORECASTS
- BATTERY MAKER, PC MAKER AND CELLULAR MAKER STRATEGIES AND POSITIONS

**2. MARKET AND COMPETITIVE ENVIRONMENT (DETAIL IN THE FULL REPORT)**

- CELLULAR PHONES,
  - CELLULAR PHONES SHIPMENT, M UNITS, 1995-2010
  - CELLULAR PHONES BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1995-2010
- PORTABLE PCs,
  - PORTABLE PCs SHIPMENT, M UNITS, 1995-2010
  - PORTABLE PCs BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1995-2010
- CAMCORDERS
  - CAMCORDERS SHIPMENT, M UNITS, 1998-2010
  - ANALOG CAMCORDER BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
  - DIGITAL CAMCORDER BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- POWER TOOLS
  - POWER TOOLS SHIPMENT, M UNITS, 1998-2010
  - POWER TOOLS BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- DIGITAL CAMERA
  - DIGITAL CAMERA SHIPMENT, M UNITS, 1998-2010
  - DIGITAL CAMERA BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- VIDEO GAMES
  - GAMES SHIPMENT, M UNITS, 2000-2010
  - GAMES BATTERY PACK BY CHEMISTRY, % IN VOLUME, 2000-2010
- MP3 PLAYERS & PORTABLE HDD
  - MP3 SHIPMENT, M UNITS, 2000-2010
  - MP3 BATTERY PACK BY CHEMISTRY, % IN VOLUME, 2000-2010
- TOYS & RC CARS
  - RC CARS & TOYS SHIPMENT, M UNITS, 1999-2010
  - RC CARS & TOYS BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1999-2010
- CORDLESS PHONES
  - CORDLESS PHONES SHIPMENT, M UNITS, 1998-2010
  - CORDLESS PHONES BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- PDA
  - PDA SHIPMENT, M UNITS, 1998-2010
  - PDA BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- HOUSEHOLD DEVICES
  - BATTERY SOLD FOR HOUSEHOLD DEVICES, M CELLS, 2000-2010 BY CHEMISTRY
- E-BIKES
  - E-BIKES SHIPMENT, M UNITS, 1997-2010
  - E-BIKES BATTERY PACK BY CHEMISTRY, % IN VOLUME, 1998-2010
- AUTOMOTIVE
  - HEV SHIPMENT, '000 UNITS, 2002-2020
  - HEV BATTERY PACK BY CHEMISTRY, % IN VOLUME, 2002-2010
  - HEV BATTERY MARKET IN M\$, 2000-2020
  - P-HEV MARKET, '000 UNITS, 2010-2020
  - P-HEV BATTERY MARKET IN M\$, 2000-2020
  - EV MARKET, '000 UNITS, 2010-2020
  - EV BATTERY MARKET IN M\$, 2000-2020

### 3. FORECASTS UP TO 2010 & 2020

- WORLDWIDE BATTERY MARKET IN VOLUME (M CELLS) BY CHEMISTRY: NiCd, NiMH, LI-ION & LI-POLYMER (1995 - 2020)
- WORLDWIDE BATTERY MARKET IN VALUE (M\$) BY CHEMISTRY: NiCd, NiMH, LI-ION & LI-POLYMER (1990 - 2020)
- BATTERY MARKET BY APPLICATION (CELLULAR PHONES, PORTABLE PCs, POWER TOOLS, AUTOMOTIVE) & CHEMISTRY IN VOLUME FOR 2000, 2006, 2010 & 2020
- BATTERY MARKET BY APPLICATION (CAMCORDERS, DSC, GAMES, MP3, PDA) & CHEMISTRY IN VOLUME FOR 2000, 2006, 2010 & 2020
- BATTERY MARKET BY APPLICATION (HOUSEHOLD, SECURITY, RC CAR & TOYS, E-BIKES, CORDLESS PHONES) & CHEMISTRY IN VOLUME FOR 2000, 2006, 2010 & 2020
- BATTERY MARKET BY APPLICATION (CELLULAR PHONES, PORTABLE PCs, POWER TOOLS, AUTOMOTIVE) & CHEMISTRY IN VALUE (M\$) FOR 2000, 2006, 2010 & 2020
- BATTERY MARKET BY APPLICATION (CAMCORDERS, DSC, GAMES, MP3, PDA) & CHEMISTRY IN VALUE (M\$) FOR 2000, 2006, 2010 & 2020
- BATTERY MARKET BY APPLICATION (HOUSEHOLD, SECURITY, RC CAR & TOYS, E-BIKES, CORDLESS PHONES) & CHEMISTRY IN VALUE (M\$) FOR 2000, 2006, 2010 & 2020
- NiMH MARKET (M CELLS) 2000, 2006, 2010, 2020 BY APPLICATION
- LI-ION & POL MARKET (M CELLS) 2000, 2006, 2010, 2020 BY APPLICATION
- NiMH MARKET (M \$) 2000, 2006, 2010, 2020 BY APPLICATION
- LI-ION & POL MARKET (M \$) 2000, 2006, 2010, 2020 BY APPLICATION

### CONCLUSIONS

### ANNEXES

### DETAILED EXCEL TABLES 2000-2010

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 1: CELLULAR PHONES (>110 PAGES)****19<sup>TH</sup> EDITION – FEBRUARY 2010****INTRODUCTION**

- 1980-2000 CELLULAR PHONES EVOLUTION
- DEFINITIONS
- POWER NEEDS FOR A CELLULAR PHONES

**1. PART I: THE BATTERY FOR CELLULAR PHONES MARKET IN 2009****1. CELLULAR MARKET WORLDWIDE IN 2009**

- WORLDWIDE CELLULAR PHONES SALES IN 2009
  - WORLDWIDE CELLULAR PHONES SALES & GROWTH, 1992-2009, IN VOLUME
  - WORLDWIDE QUARTERLY CELLULAR PHONES SALES, UNITS, Q1 2000 – Q4 2009
  - WORLDWIDE CELLULAR PHONES PRODUCTION IN VOLUME, 2000-2009, FOR TOP 6 MAKERS
  - WORLDWIDE CELLULAR PHONES MARKET SHARE IN 2008 & 2009, IN VOLUME
  - WORLDWIDE CELLULAR PHONES MARKET SHARE TRENDS, IN VOLUME, 2000-2009
- WORLDWIDE CELLULAR PHONES MARKET IN 2009 – SUBSCRIBERS , BY COUNTRY
  - DIFFERENT SYSTEMS FOR CELLULAR PHONES
  - IDENTIFYING THE DEMAND IN EACH COUNTRY
  - CELLULAR PHONES ACTIVE SUBSCRIBERS 1995-2009 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
  - CELLULAR PHONES PENETRATION RATES, 1995-2009, FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
  - CELLULAR PHONES PENETRATION RATES IN 2009 IN WESTERN EUROPE COUNTRY BY COUNTRY
  - CELLULAR PHONES PENETRATION RATES IN 2009 IN EASTERN EUROPE COUNTRY BY COUNTRY
  - CELLULAR PHONES PENETRATION RATES IN 2009 IN AFRICA COUNTRY BY COUNTRY
  - CELLULAR PHONES PENETRATION RATES IN 2009 IN OCEANIA COUNTRY BY COUNTRY
  - CELLULAR PHONES PENETRATION RATES IN 2009 IN LATIN AMERICA COUNTRY BY COUNTRY
- WORLDWIDE CELLULAR PHONES MARKET IN 2009 – CELLULAR PHONES DEMAND , BY COUNTRY
  - CELLULAR PHONES DEMAND 2009 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA: NUMBER OF NEW SUBSCRIBERS & RENEWALS
  - 2008-2009 CELLULAR PHONES DEMAND GROWTH BY GEOGRAPHIC AREA

**2. BATTERY MARKET FOR CELLULAR PHONES IN 2009**

- CELLULAR PHONES POWER NEEDS IN 2009
- GSM & PDC POWER NEEDS COMPARISON
- EUROPE, US, JAPAN & ASIA POWER NEEDS
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, WORLDWIDE, 1995-2009
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, WESTERN EUROPE, 1995-2009
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, NORTH AMERICA, 1995-2009
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, ASIA & OCEANIA, 1995-2009
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, CHINA, 1995-2009
- RATIO OF HANDSET POWERED BY NiCd, NiMH, Li-ION & Li-POLYMER, WORLDWIDE, 2000-2009 FOR NOKIA, MOTOROLA, SONY-ERICSSON, SAMSUNG, SIEMENS



- NUMBER OF LI-ION CELLS ORDERED IN 2009 BY NOKIA, MOTOROLA, SONY-ERICSSON, SAMSUNG, SIEMENS, LG, AND BY BATTERY SUPPLIERS
- BATTERY SUPPLIERS MAIN CUSTOMERS IN 2009
- BATTERY MARKET FOR JAPAN IN 2009
  - CELLULAR PHONES SUBSCRIBERS IN 2009
  - HANDSETS SOLD IN 2009
  - BATTERY NEED IN VOLUME IN 2009
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2009
  - AFTER MARKET RATIO IN 2009
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2009
  - AFTER MARKET RATIO 1998-2009
- BATTERY MARKET FOR USA IN 2009
  - CELLULAR PHONES SUBSCRIBERS IN 2009
  - HANDSETS SOLD IN 2009
  - BATTERY NEED IN VOLUME IN 2009
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2009
  - AFTER MARKET RATIO IN 2009
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2009
  - AFTER MARKET RATIO 1998-2009
- BATTERY MARKET FOR WESTERN EUROPE IN 2009
  - CELLULAR PHONES SUBSCRIBERS IN 2009
  - HANDSETS SOLD IN 2009
  - BATTERY NEED IN VOLUME IN 2009
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2009
  - AFTER MARKET RATIO IN 2009
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2009
  - AFTER MARKET RATIO 1998-2009
- BATTERY MARKET FOR ASIA & OCEANIA IN 2009
  - CELLULAR PHONES SUBSCRIBERS IN 2009
  - HANDSETS SOLD IN 2009
  - BATTERY NEED IN VOLUME IN 2009
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2009
  - AFTER MARKET RATIO IN 2009
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2009
  - AFTER MARKET RATIO 1998-2009
- BATTERY MARKET WORLDWIDE IN 2009
  - CELLULAR PHONES SUBSCRIBERS IN 2009
  - HANDSETS SOLD IN 2009
  - BATTERY NEED IN VOLUME IN 2009
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2009
  - AFTER MARKET RATIO IN 2009
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2009
  - AFTER MARKET RATIO 1998-2009
- BATTERY FOR CELLULAR PHONES BY GEOGRAPHIC AREA IN 2008 & 2009 IN VOLUME
- NiMH BATTERY NEEDS BY GEOGRAPHIC AREA 1995-2009 IN VOLUME
- LI-ION & LI POLYMER BATTERY NEEDS BY GEOGRAPHIC AREA 1995-2009 IN VOLUME
- BATTERY PRICE FOR CELLULAR PHONES 1998-2009 IN US\$/PACK
- BATTERY MARKET IN VOLUME 1998-2009 BY CHEMISTRY

- BATTERY MARKET IN VALUE (M\$) 1998-2009 BY CHEMISTRY

## **2. PART 2: MAIN TRENDS FOR CELLULAR PHONES BATTERIES**

### **1. PARAMETERS ANALYSED & METHODOLOGY**

- CELLULAR PHONES SUBSCRIBER TRENDS PER COUNTRY
- % OF HANDSETS RENEWAL TRENDS
- BATTERY CHEMISTRY RATIO PER GEOGRAPHIC AREA
- AFTER MARKET TRENDS

### **2. BATTERY SIZE IN 2009 FOR NOKIA, MOTOROLA, SONY-ERICSSON, SAMSUNG, LG, SIEMENS, BIRD, PMC, NEC,**

- BATTERY FOR CELLULAR PHONES IN 2009 BY SIZE
- SIZE EVOLUTION FROM 2008 TO 2009

### **3. CELLULAR PHONES APPLICATIONS TRENDS**

- MOBILE INTERNET TRENDS
- 2G & 3G CELLULAR PHONES
- I-MODE EVOLUTION IN JAPAN
- IMPACT OF CELLULAR PHONES APPLICATIONS ON APRU
- LI-ION & LI-P RATE (%) 1995-2010

## **3. PART 3: BATTERY MARKET FOR CELLULAR FORECASTS**

- CELLULAR PHONES SUBSCRIBERS FORECASTS
  - CELLULAR PHONES PENETRATION RATE 1990-2020 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
  - CELLULAR PHONES SUBSCRIBERS 1990-2020 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
- CELLULAR PHONES RENEWAL RATIO 1990-2020 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
- CELLULAR PHONES HANDSETS 1990-2020 FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA: RENEWALS & NEW SUBSCRIBERS
- BATTERY MARKET FOR USA IN 2010
  - CELLULAR PHONES SUBSCRIBERS IN 2010
  - HANDSETS SOLD IN 2010
  - BATTERY NEED IN VOLUME IN 2010
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2010
  - AFTER MARKET RATIO IN 2010
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2010
  - AFTER MARKET RATIO 1998-2010
- BATTERY MARKET FOR WESTERN EUROPE IN 2010
  - CELLULAR PHONES SUBSCRIBERS IN 2010
  - HANDSETS SOLD IN 2010
  - BATTERY NEED IN VOLUME IN 2010
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2010
  - AFTER MARKET RATIO IN 2010
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2010
  - AFTER MARKET RATIO 1998-2010

- BATTERY MARKET FOR ASIA & OCEANIA IN 2010
  - CELLULAR PHONES SUBSCRIBERS IN 2010
  - HANDSETS SOLD IN 2010
  - BATTERY NEED IN VOLUME IN 2010
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2010
  - AFTER MARKET RATIO IN 2010
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2010
  - AFTER MARKET RATIO 1998-2010
- BATTERY MARKET WORLDWIDE IN 2010
  - CELLULAR PHONES SUBSCRIBERS IN 2010
  - HANDSETS SOLD IN 2010
  - BATTERY NEED IN VOLUME IN 2010
  - BATTERY NEED IN VOLUME FOR AFTER MARKET (RETAIL) IN 2010
  - AFTER MARKET RATIO IN 2010
  - NUMBER OF CELLS NEED BY CHEMISTRY 1998-2010
  - AFTER MARKET RATIO 1998-2010
- BATTERY FOR CELLULAR PHONES BY GEOGRAPHIC AREA IN 2006, 2010 & 2020 IN VOLUME FOR JAPAN, USA, WESTERN EUROPE, ASIA PACIFIC, CHINA, INDIA, EASTERN EUROPE, LATIN AMERICA, AFRICA
- LI-ION POLYMER DEMAND FOR CELLULAR PHONES UP TO 2020
- LI-ION & LI POLYMER BATTERY NEEDS BY GEOGRAPHIC AREA 2010 IN VOLUME
- LI-ION & LI POLYMER BATTERY NEEDS BY GEOGRAPHIC AREA 2002-2010, IN VOLUME
- BATTERY PRICE FOR CELLULAR PHONES 1998-2010 IN US\$/PACK
- BATTERY MARKET IN VOLUME 1998-2010 BY CHEMISTRY
- BATTERY MARKET IN VALUE (M\$) 1998-2010 BY CHEMISTRY
- BATTERY DEMAND FOR CELLULAR IN 2000, 2006, 2010 & 2020 FOR NiCd, NiMH, Li-ION & Li-POLYMER, IN VOLUME
- BATTERY DEMAND FOR CELLULAR IN 2000, 2006, 2010 & 2020 FOR NiCd, NiMH, Li-ION & Li-POLYMER, IN VALUE (M\$)

## CONCLUSION

## ANNEXES

## DETAILED EXCEL TABLES 2000-2010

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 2: PORTABLE PCs (70 PAGES)****19<sup>TH</sup> EDITION – FEBRUARY 2010****INTRODUCTION****1. PART 1: THE BATTERY FOR PORTABLE PCs IN 2009**

- WORLDWIDE PORTABLE PCs SALES IN 2009
- PORTABLE PCs SUPPLIERS MARKET SHARE IN 2009 IN VOLUME
- PORTABLE PCs MARKET SHARE IN VOLUME TRENDS, 2002-2009
- RATIO OF PORTABLE PCs OUTSOURCED
- POWER NEEDS FOR PORTABLE PCs
- RATIO OF NiMH & LI-ION BATTERIES FOR PORTABLE PCs, 1995-2009
- BATTERY MARKET FOR PORTABLE PCs, VOLUME (M CELLS) 2000-2009
- AFTER MARKET & RETAIL BATTERY RATIO FOR PORTABLE PCs
- PORTABLE PCs MAKERS & THEIR BATTERY SUPPLIERS RELATIONSHIP IN 2009
- NUMBER OF CELLS ORDERED BY DELL, HP, TOSHIBA, IBM, FUJITSU, NEC, APPLE, GW, ACER BY BATTERY SUPPLIERS
- DETAIL BATTERY SUPPLIERS FOR DELL 2002-2009: M CELLS FOR EACH SUPPLIER
- DETAIL BATTERY SUPPLIERS FOR TOSHIBA 2002-2009: M CELLS FOR EACH SUPPLIER

**2. PART 2: HOW THE BATTERY RECALL IMPACT THE MARKET?**

- DETAIL OF THE RECALL IN M PORTABLE PCs FOR EACH BRAND
- SONY'S LI-ION FAILURE REASONS
- THE COST OF THE RECALL FOR SONY
- IMPACT ON THE STOCK EXCHANGE
- 2006-2009 PORTABLE PCs CHANGE THE BATTERY SUPPLY STRATEGY
- LI-ION SAFETY CONCERNS
- HISTORY OF US REPORTED INCIDENT WITH BATTERIES
- LI-ION: OTHERS RECALL: SANYO, MBI

**3. PART 3: THE MAIN TRENDS: SIZE, PRICE, CAPACITY**

- BATTERY COST
  - LI-ION FOR PORTABLE PCs BATTERY COST 1996-2009
  - LI-ION BATTERY COST STRUCTURE
  - AVERAGE CELLS PRICE IN \$/CELLS 2004-2009
  - AVERAGE CELLS PRICE IN \$/WH 2004-2009
  - AVERAGE SALES PRICE 2004-2009 BY BATTERY CAPACITY: 1.6 – 2 – 2.2 – 2.4 – 2.6 – 2.8 AH
  - AVERAGE SALES PRICE IN 2009 FOR BATTERY SUPPLIERS: SANYO, MBI, SONY, NEC, LG, SAMSUNG, LISHEN,
- BATTERY SIZE
  - 2008-2009 BATTERY CAPACITY MARKET SHARE
  - BATTERY CAPACITY FOR PORTABLE PCs TRENDS 2000-2009, MAH
  - MILLION CELLS SOLD IN VOLUME FROM 2004 TO 2009 BY CAPACITY
  - AVERAGE POWER NEED FOR A PORTABLE PC 1998-2009
  - AVERAGE SCREEN SIZE OF PORTABLE PCs 1999-2009
  - AVERAGE CELLS PER PACK USED FOR PORTABLE PCs (1999-2010)
  - DEMAND FOR PACK CONFIGURATION IN 2009

**4. PART 4: BATTERY MARKET FOR PORTABLE PCs FORECASTS**

- PORTABLE PCs SALES IN VOLUME, 1995-21010
- LI-ION & NiMH RATIO 1995-2010
- BATTERY NEEDS FOR PORTABLE PCs FOR OEM & RETAIL
- PORTABLE PCs NEEDS FROM 1995 TO 2020
  - VOLUME OF PORTABLE PCs 1995-2020
  - BATTERY CHEMISTRY 1995-2020
  - CELL PER PACK 1995-2020
  - AFTER MARKET RATIO 1995-2020
  - NiMH & LI-ION MILLION CELLS NEED 1995-2020
- BATTERY FOR PORTABL PCs BY CHEMISTRY, 2000-2020 IN VOLUME (M CELLS)
- BATTERY FOR PORTABL PCs BY CHEMISTRY, 2000-2020 IN VALUE (M \$)

**CONCLUSION****ANNEXES****DETAILED TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 3: POWER TOOLS (35 PAGES)****19<sup>TH</sup> EDITION – FEBRUARY 2010****INTRODUCTION****1. PART 1: THE BATTERY FOR POWER TOOLS IN 2009**

- WORLDWIDE POWER TOOLS SALES 2009-2010
- WORLDWIDE POWER TOOLS SALES 2009-2010 BY VOLTAGE
- POWER TOOLS PRODUCTION IN CHINA IN 2009 BY OEM: TTI, B&D, BOSCH, JINGDING, MAKITA, XINTEHAD, CHOONAN, TOPLINK
- POWER TOOLS MAKERS MARKET SHARE IN 2009
- POWER NEEDS FOR POWER TOOLS (PROFESSIONALS VS. CONSUMERS)
- BATTERY MARKET FOR POWER TOOLS, VOLUME (M CELLS) 2000-2009
- NiMH VS. NiCd CELLS FOR POWER TOOLS
- NiCd, NiMH & Li-ION CELLS DEMAND BY OEM: : TTI, B&D, BOSCH, JINGDING, MAKITA
- Li-ION BATTERY SUPPLIERS FOR POWER TOOLS & THEIR CUSTOMERS IN 2009 (VOLUME)
- Li-ION BATTERY MAKERS FOR POWER TOOLS MARKET SHARES IN 2009
- THE MAIN Li-ION BATTERY FOR POWER TOOLS ON THE MARKET IN 2009
- DETAIL OF CUSTOMER/SUPPLIER RELATIONSHIP FOR POWER TOOLS IN M CELLS SUPPLIED IN 2009

**2. PART 2: BATTERY MARKET FOR POWER TOOLS FORECASTS**

- PENETRATION RATE FOR NiCd, NiMH & Li-ION FOR POWER TOOLS, 1998-2009, M CELLS
- THE NiCd BATTERY MARKET FOR POWER TOOLS, 2000-2010
  - THE NiCd BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiCd BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiCd BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE NiMH BATTERY MARKET FOR POWER TOOLS, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE Li-ION BATTERY MARKET FOR POWER TOOLS, 2000-2010
  - THE Li-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE Li-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE Li-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE BATTERY MARKET FOR POWER TOOLS, 2000-2010 IN VOLUME (M CELLS)
- THE BATTERY MARKET FOR POWER TOOLS, 2000-2010, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 4: AUTOMOTIVE (HEV, P-HEV, EV) – 60 PAGES****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION****1. PART 1: THE BATTERY FOR HEV IN 2009**

- WORLDWIDE HEV SALES 2000-2009 FOR USA, EUROPE & OTHERS
- WORLDWIDE HEV SALES 2000-2009 BY MAKERS: TOYOTA, HONDA, FORD, OTHERS
- HEV ADVANTAGES & DISADVANTAGES
- WHY HEV
  - CRUDE OIL DEMAND WORLDWIDE, MILLION TONS, 1973-2009
  - PRICE OF THE WTI BARREL OF OIL, 1973-2009, US\$
  - CO<sub>2</sub> EMISSIONS FROM FUEL COMBUSTIONS, MILLION TONS, 1970-2009
- CAR MAKERS OPINION ON HEV
- HEV SEGMENTATION & DEFINITION
- WORLDWIDE POWER TOOLS SALES 2009-2010 BY AREA: USA, JAPAN, EUROPE, OTHERS
- HEV MARKET SHARES WORLDWIDE IN 2009
- SMALL HEV MARKET IN EUROPE: DIESEL & TAXES EXPLANATION
- THE BATTERY FOR HEV: SANYO & MBI BATTERIES
- BATTERY MARKET FOR HEV, 2002-2009, IN VOLUME BY BATTERY CHEMISTRY
- BATTERY MARKET FOR HEV, 2002-2009, IN VALUE BY BATTERY CHEMISTRY
- THE WORLDWIDE NiMH BATTERY MARKET IN VOLUME, 2000-2009
- THE NiMH BATTERY MARKET FOR HEV IN VOLUME, 2000-2009
- NiMH BATTERY SUPPLIERS & HEV MAKERS RELATION IN 2009
- LI-ION BATTERY SUPPLIERS & HEV MAKERS RELATION IN 2009

**2. PART 2: BATTERY MARKET FOR AUTOMOTIVE FORECASTS**

- HEV MARKET WORLDWIDE IN VOLUME, 2004-2010
  - HEV MARKET BY HEV MAKERS IN VOLUME, 2004-2010
  - NEW HEV LAUNCHES 2006-2009
- NiMH BATTERIES FOR HEV
- NiMH & LI-ION BATTERIES PRICES COMPARISON
- CAR TIME TO MARKET
- THE LI-ION FROM TOYOTA
- HEV CAR MAKERS STRATEGIES
- R&D ON HEV
- THE BATTERY MARKET FOR HEV IN VOLUME, 2000-2010
- THE BATTERY MARKET FOR HEV IN VALUE, 2000-2010
- FORECASTS UP TO 2020
  - CAR PASSENGERS SOLD UP TO 2020
  - HEV PENETRATION RATE WORLDWIDE UP TO 2020
  - HEV MARKET IN VOLUME 2006-2020
  - LI-ION PENETRATION RATE UP TO 2020
  - THE HEV BATTERY MARKET FOR NiMH & LI-ION 2006-2020
- P-HEV FORECASTS 2010-2020
- P-HEV ENERGY & POWER NEEDS
- P-HEV BATTERY MARKET FORECASTS 2010-2020 IN MWh
- P-HEV BATTERY COST TRENDS 2010-2020

- P-HEV BATTERY MARKET FORECASTS 2010-2020 IN M\$
- EV FORECASTS 2010-2020
- EV ENERGY & POWER NEEDS
- EV BATTERY MARKET FORECASTS 2010-2020 IN MWH
- EV BATTERY COST TRENDS 2010-2020
- EV BATTERY MARKET FORECASTS 2010-2020 IN M\$
- HEV, P-HEV & EV BATTERY MARKET FORECASTS 2010-2020 IN MWH FOR NiMH & LI-ION
- HEV, P-HEV & EV BATTERY MARKET FORECASTS 2010-2020 IN M\$ FOR NiMH & LI-ION

### CONCLUSIONS

### ANNEXES

### DETAIL TABLES 2000-2010



**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 5: DIGITAL CAMERA (DSC) – 45 PAGES****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION****1. PART 1: THE BATTERY FOR DSC IN 2009**

- WORLDWIDE DSC SALES 2008-2010
- DSC MAKERS MARKET SHARE IN 2009
- POWER NEEDS FOR DSC
- ALKALINE, LITHIUM PRIMARY, LI-ION, ZN-AIR COMPARISON
- DSC SALES PRICES IN 2008-2009
- PRIMARY, NIMH & LI-ION CELLS DEMAND BY OEM: CANON, SONY, KODAK, OLYMPUS, NIKON, FUJIFILM
- PRIMARY, NIMH & LI-ION PENETRATION RATE FOR DSC, 1997-2010
- PRIMARY BATTERY DSC BUYERS CONVERSION RATE TO NIMH

**2. PART 2: BATTERY MARKET FOR POWER TOOLS FORECASTS**

- SALES OF DSC EQUIPPED WITH PRIMARY BATTERIES WORLDWIDE, VOLUME
- CALCULATION OF RECHARGEABLE BATTERY RETAIL MARKET
  - DSC EQUIPPED WITH ALKALINE
  - DSC EQUIPPED WITH LI-PRIMARY
- NIMH BATTERY MARKET FOR DSC: OEM & RETAIL IN VOLUME, 2000-2010
- NIMH CELLS PRICE FOR OEM (\$/CELL)
- NIMH CELLS PRICE FOR RETAIL (\$/CELLS)
- NIMH BATTERY MARKET FOR DSC: OEM & RETAIL IN VALUE, 2000-2010
- LI-ION BATTERY MARKET FOR DSC, IN VOLUME, 2000-2010
- LI-ION CELLS PRICE (\$/CELL)
- LI-ION BATTERY MARKET FOR DSC: OEM & RETAIL IN VALUE, 2000-2010
- LONG TERM FORECASTS (UP TO 2020)
- 

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 6: CAMCORDERS (25 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION****1. PART 1: CAMCORDERS IN 2009**

- WORLDWIDE CAMCORDERS SALES 2008-2010
- ANALOG VS. DIGITAL CAMCORDERS TRENDS IN VOLUME 1998-2010
- CAMCORDERS MAKERS MARKET SHARE IN 2009
- POWER NEEDS FOR CAMCORDERS IN 2009
- BATTERY MARKET FOR POWER TOOLS, VOLUME (M CELLS) 2000-2009
- NiMH VS. NiCd VS. LI-ION CELLS FOR CAMCORDERS
- NiCd, NiMH & LI-ION BATTERIES PENETRATION RATE (VOLUME) FOR ANALOG CAMCORDERS (1998-2009)
- NiCd, NiMH & LI-ION BATTERIES PENETRATION RATE (VOLUME) FOR DIGITAL CAMCORDERS (1998-2009)
- LI-ION BATTERY SUPPLIERS FOR POWER TOOLS & THEIR CUSTOMERS IN 2009 (VOLUME)

**2. PART 2: BATTERY MARKET FOR CAMCORDERS FORECASTS**

- WORLDWIDE CAMCORDERS SALES 2008-2010
- BATTERY RETAIL RATE FOR CAMCORDER BY CHEMISTRY
- THE NiCd BATTERY MARKET FOR CAMCORDERS, 2000-2010
  - THE NiCd BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiCd BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiCd BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE NiMH BATTERY MARKET FOR CAMCORDERS, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-ION BATTERY MARKET FOR CAMCORDERS, 2000-2010
  - THE LI-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE BATTERY MARKET FOR CAMCORDERS, 2000-2010 IN VOLUME (M CELLS)
- THE BATTERY MARKET FOR CAMCORDERS, 2000-2010, IN VALUE (M\$)
- LONG TERM (2020) BATTERY MARKET FOR CAMCORDERS IN VOLUME
- LONG TERM (2020) BATTERY MARKET FOR CAMCORDERS IN VALUE

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 7: PORTABLE HDD & FLASH MUSIC PLAYERS (10 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- WORLDWIDE HDD & FLASH MUSIC PLAYERS SALES 2000-2020
- HDD & FLASH MUSIC PLAYERS MAKERS MARKET SHARE IN VOLUME 2002-2009
- HDD & FLASH MUSIC PLAYERS MAKERS MARKET SHARE IN VOLUME 2009
- POWER NEEDS FOR HDD & FLASH MUSIC PLAYERS IN 2009
- ALKALINE, LI-ION & LI-POLYMER PENETRATION RATE FOR HDD & FLASH MUSIC PLAYERS 2000-2020
- THE LI-ION BATTERY MARKET FOR HDD & FLASH MUSIC PLAYERS, 2000-2010
  - THE LI-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-POLYMER BATTERY MARKET FOR HDD & FLASH MUSIC PLAYERS, 2000-2010
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-POLYMER BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010****THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 8: VIDEO GAMES (10 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- WORLDWIDE VIDEO GAMES SALES 2000-2020
- VIDEO GAMES MAKERS MARKET SHARE IN VOLUME 2002-2009
- VIDEO GAMES MAKERS MARKET SHARE IN VOLUME 2009
- POWER NEEDS VIDEO GAMES IN 2009
- LI-ION & LI-POLYMER PENETRATION RATE FOR VIDEO GAMES 2000-2020
- THE LI-ION BATTERY MARKET FOR VIDEO GAMES, 2000-2010
  - THE LI-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-POLYMER BATTERY MARKET FOR VIDEO GAMES, 2000-2010
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-POLYMER BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 9: PERSONAL DIGITAL ASSISTANT – PDA - (10 PAGES)****19TH EDITION – MARCH 2010****INTRODUCTION**

- WORLDWIDE PDA SALES 2000-2020
- PDA MAKERS MARKET SHARE IN VOLUME 2002-2009
- PDA MAKERS MARKET SHARE IN VOLUME 2009
- POWER NEEDS PDA IN 2009
- ALKALINE, NiMH, LI-ION & LI-POLYMER PENETRATION RATE FOR PDA 2000-2020
- THE NiMH BATTERY MARKET FOR PDA, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-ION BATTERY MARKET FOR PDA, 2000-2010
  - THE LI-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-POLYMER BATTERY MARKET FOR PDA, 2000-2010
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-POLYMER BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-POLYMER BATTERY MARKET 2000-2010, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 10: CORDLESS PHONES (15 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- WORLDWIDE CORDLESS PHONES SALES 2008-2010, IN VOLUME
- ANALOG VS. DIGITAL CORDLESS PHONES TRENDS IN % 2000-2010
- CORDLESS PHONES MAKERS MARKET SHARE IN 2009
- CORDLESS PHONES PRODUCTION IN CHINA BY OEM: UNIDEN, CCT, V-TECH, HB, TALDA,
- POWER NEEDS FOR CORDLESS PHONES IN 2009
- NiCd, NiMH & LI-ION BATTERIES PENETRATION RATE (VOLUME) FOR ANALOG CORDLESS PHONES (1998-2009)
- NiCd, NiMH & LI-ION BATTERIES PENETRATION RATE (VOLUME) FOR DIGITAL CORDLESS PHONES (1998-2009)
- THE NiCd BATTERY MARKET FOR CORDLESS PHONES, 2000-2010
  - THE NiCd BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiCd BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiCd BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE NiMH BATTERY MARKET FOR CORDLESS PHONES, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-ION FOR CORDLESS PHONES
- THE BATTERY MARKET FOR CORDLESS PHONES, 2000-2010 IN VOLUME (M CELLS)
- THE BATTERY MARKET FOR CORDLESS PHONES, 2000-2010, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 11: HOUSEHOLD DEVICES (19 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- CORDLESS SHAVERS MARKET
  - MARKET IN VOLUME, 2000-2015
  - SEGMENTATION
  - MARKET SHARE IN 2009
  - CORDLESS SHAVERS BATTERY NEEDS
  - BATTERY TECHNOLOGY CHOICE BY MAKERS
  - BATTERY FOR CORDLESS SHAVERS MARKET BY TECHNOLOGY (NiCd, NiMH, Li-ion)
- TOOTHBRUSH MARKET
  - MARKET IN VOLUME, 2000-2015
  - SEGMENTATION
  - MARKET SHARE IN 2009
  - BATTERY NEEDS
  - BATTERY TECHNOLOGY CHOICE BY MAKERS
  - BATTERY MARKET BY TECHNOLOGY (NiCd, NiMH, Li-ion)
- PORTABLE CLEANERS MARKET
  - MARKET IN VOLUME, 2000-2015
  - SEGMENTATION
  - MARKET SHARE IN 2009
  - BATTERY NEEDS
  - BATTERY TECHNOLOGY CHOICE BY MAKERS
  - BATTERY MARKET BY TECHNOLOGY (NiCd, NiMH, Li-ion)
- NiCd MARKET FOR HOUSEHOLD DEVICES, 2000-2009 IN VOLUME (M CELLS)
- NiMH MARKET FOR HOUSEHOLD DEVICES, 2000-2009 IN VOLUME (M CELLS)
- Li-ion MARKET FOR HOUSEHOLD DEVICES, 2000-2009 IN VOLUME (M CELLS)
- POWER NEEDS FOR HOUSEHOLD DEVICES IN 2009
- THE NiCd BATTERY MARKET FOR HOUSEHOLD DEVICES, 2000-2010
  - THE NiCd BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiCd BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiCd BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE NiMH BATTERY MARKET FOR HOUSEHOLD DEVICES, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE Li-ion FOR HOUSEHOLD DEVICES
- THE BATTERY MARKET FOR HOUSEHOLD DEVICES, 2000-2020 IN VOLUME (M CELLS)
- THE BATTERY MARKET FOR HOUSEHOLD DEVICES, 2000-2020, IN VALUE (M\$)

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 12: E-BIKES (40 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- THE BIKE IN USE WORLDWIDE BY GEOGRAPHIC AREA
- WORLDWIDE E-BIKES SALES 2000-2010
- WORLDWIDE E-BIKES SALES 2000-2010, BY GEOGRAPHIC AREA
- LEAD ACID, NiCd & NiMH BATTERY CHARACTERISTICS FOR E-BIKES
- E-BIKES MAKERS POINTS OF VIEW ON BATTERIES
- LEAD ACID, NiMH, LI-ION PENETRATION RATE FOR E-BIKES 2000-2010, WORLDWIDE
- LEAD ACID, NiMH, LI-ION PENETRATION RATE FOR E-BIKES 2000-2010, IN CHINA
- LEAD ACID, NiMH, LI-ION PENETRATION RATE FOR E-BIKES 2000-2010, IN JAPAN
- LEAD ACID, NiMH, LI-ION PENETRATION RATE FOR E-BIKES 2000-2010, IN USA
- LEAD ACID, NiMH, LI-ION PENETRATION RATE FOR E-BIKES 2000-2010, IN EUROPE
- E-BIKES EQUIPPED BY LEAD ACID, NiCd & NiMH BATTERIES IN VOLUME, 2000-2010
- RETAIL BATTERY MARKET FOR E-BIKES 1997-2010
- THE NiCd BATTERY MARKET FOR E-BIKES, 2000-2010
  - THE NiCd BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiCd BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiCd BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE NiMH BATTERY MARKET FOR E-BIKES, 2000-2010
  - THE NiMH BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE NiMH BATTERY PRICE 2000-2010, (\$/CELL)
  - THE NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE LI-ION BATTERY MARKET FOR E-BIKES, 2000-2010
  - THE LI-ION BATTERY MARKET 2000-2010, IN VOLUME (M CELLS)
  - THE LI-ION BATTERY PRICE 2000-2010, (\$/CELL)
  - THE LI-ION BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE BATTERY MARKET FOR E-BIKES, 2000-2010 IN VOLUME (M CELLS)
- THE BATTERY MARKET FOR E-BIKES, 2000-2010, IN VALUE (M\$)
- LONG TERM (2020) BATTERY MARKET FOR E-BIKES IN VOLUME & VALUE

**ANNEXES****DETAIL TABLES 2000-2010**

**THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020****MODULE 13: R/C CARS & TOYS (45 PAGES)****19<sup>TH</sup> EDITION – MARCH 2010****INTRODUCTION**

- WORLDWIDE R/C CARS SALES 2000-2010
- 3 SEGMENTS: TOYS / HOBBY / COMPETITIONS
- WORLDWIDE R/C CARS SALES 2000-2010, FOR TOYS, HOBBY & COMPETITIONS
- R/C CARS FOR TOYS MAKERS MARKET SHARE IN 2009
- R/C CARS FOR HOBBY & COMPETITIONS MAKERS MARKET SHARE IN 2009
- ALKALINE, NiCd & NiMH PENETRATION RATE FOR R/C CARS FOR TOYS, 2000-2009
- POWER NEEDS FOR EACH SEGMENT
- NiCd & NiMH PENETRATION RATE FOR R/C CARS & TOYS FOR TOYS, 2000-2010
- TOYS
  - WORLDWIDE R/C CARS & TOYS SOLD PER YEAR, 2000-2010, IN VOLUME
  - MAIN SUPPLIERS MARKET SHARE: NIKKO, TAMIYA, TYCO, ASAHI, NEW BRIGHT,
  - SUPPLIERS BATTERY CHOICE
  - THE NiCd & NiMH BATTERY MARKET , 2000-2010 IN VOLUME
  - THE RETAIL BATTERY MARKET 2000-2010 IN VOLUME
  - THE NiCd & NiMH BATTERY PRICE (\$/CELL) – 2000-2010
  - THE BATTERY MARKET IN VALUE (M\$) 2000-2010 BY CHEMISTRY
- HOBBY
  - WORLDWIDE R/C CARS & TOYS SOLD PER YEAR, 2000-2010, IN VOLUME
  - MAIN SUPPLIERS MARKET SHARE: NIKKO, TAMIYA, ASAHI, LOSI, TEAM ASSOCIATE, TRAXXAS
  - SUPPLIERS BATTERY CHOICE
  - THE NiCd & NiMH BATTERY MARKET, 2000-2010 IN VOLUME
  - THE RETAIL BATTERY MARKET 2000-2010 IN VOLUME
  - THE NiCd & NiMH BATTERY PRICE (\$/CELL) – 2000-2010
  - THE BATTERY MARKET IN VALUE (M\$) 2000-2010 BY CHEMISTRY
- COMPETITIONS
  - WORLDWIDE R/C CARS & TOYS SOLD PER YEAR, 2000-2010, IN VOLUME
  - MAIN SUPPLIERS MARKET SHARE: TRAXXAS, TEAM ASSOCIATE, LOSI, TAMIYA
  - SUPPLIERS BATTERY CHOICE
  - THE NiCd & NiMH BATTERY MARKET , 2000-2010 IN VOLUME
  - THE RETAIL BATTERY MARKET 2000-2010 IN VOLUME
  - THE NiCd & NiMH BATTERY PRICE (\$/CELL) – 2000-2010
  - THE BATTERY MARKET IN VALUE (M\$) 2000-2010 BY CHEMISTRY
  - THE NiCd & NiMH BATTERY MARKET 2000-2010, IN VALUE (M\$)
- THE BATTERY MARKET FOR R/C CARS & TOYS, 2000-2010, IN VOLUME BY CHEMISTRY
- THE BATTERY MARKET FOR R/C CARS & TOYS, 2000-2010, IN VALUE BY CHEMISTRY
- LONG TERM (2020) BATTERY MARKET FOR R/C CARS & TOYS IN VOLUME & VALUE

**CONCLUSIONS****ANNEXES****DETAIL TABLES 2000-2010**



## THE WORLDWIDE RECHARGEABLE BATTERY MARKET 2009-2020

### MODULE 14: SECURITY LIGHTING & OTHERS (15 PAGES)

#### 19<sup>TH</sup> EDITION – MARCH 2010

##### INTRODUCTION

- CHARACTERISTICS OF EMERGENCY LIGHTING SYSTEMS
- SECURITY LIGHTING SYSTEMS MARKET 2000-2009
- BATTERY USED FOR SECURITY LIGHTING SYSTEMS
- NiCd Vs. NiMH FOR SECURITY LIGHTING SYSTEMS
- THE NiCd BATTERY MARKET 2000-2009, IN VOLUME (M CELLS)
- THE NiCd BATTERY MARKET 2000-2009, IN VALUE (M\$)
- THE NiCd BATTERY MARKET 2000-2020, IN VOLUME (M CELLS)
- THE NiCd BATTERY MARKET 2000-2020, IN VALUE (M\$)

##### OTHER APPLICATIONS

##### ANNEXES

##### DETAIL TABLES 2000-2010