

Chinese Batteries

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Li-ion battery global market (\$)
\$20 billion, 2025 (Goldman Sachs)
\$250 billion, 2040 (Bloomberg)

Li-ion battery global market (GWh)
62 GWh, 2015
223 GWh, 2025
131 GWh, 2025 for EV market

“Is China, or parts of China, the new Detroit? I think the answer is yes.”

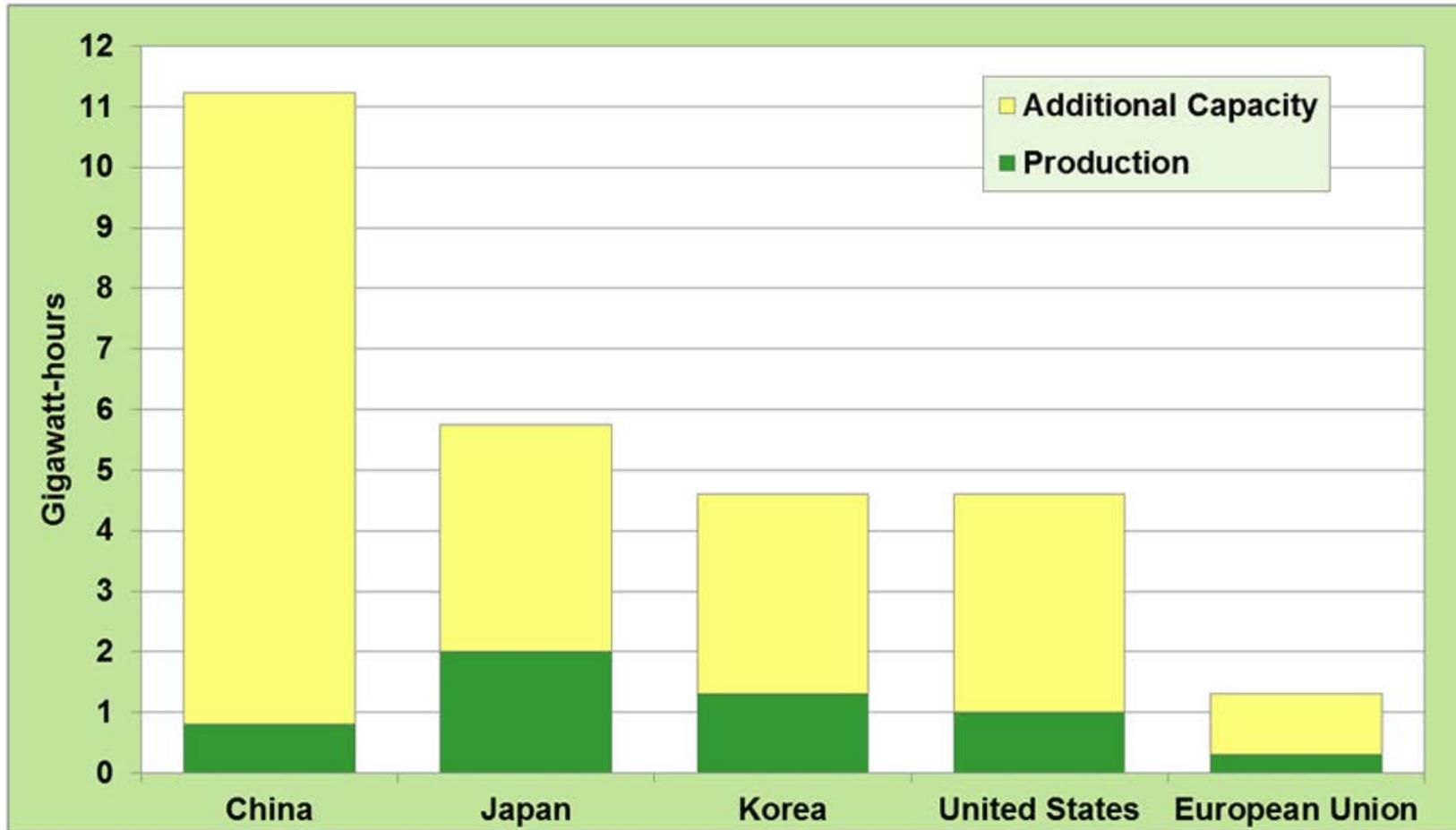
supply side push – promotion policies
demand side pull – consumer subsidies

+

challenges: no competition; quality; need integration

60% of total Li-ion battery usage will be for EVs by 2025

MANUFACTURING PRODUCTION AND CAPACITY FOR AUTOMOTIVE LITHIUM-ION BATTERY CELLS BY COUNTRY/REGION, 2014



China's battery sector

learning from Japan

Chinese R&D

market scale

sector protection

raw materials

The Japanese invent it, the Koreans expand and build it out, and the Chinese end up dominating it as that's where the market ultimately is. We are going to see a significant step-up in manufacturing capacity driven by China and Chinese demand.

- Financial Times

FT HEADLINE:

China Plays Long Game on Cobalt
and Electric Batteries

challenges and opportunities

price

technology

consumer usability

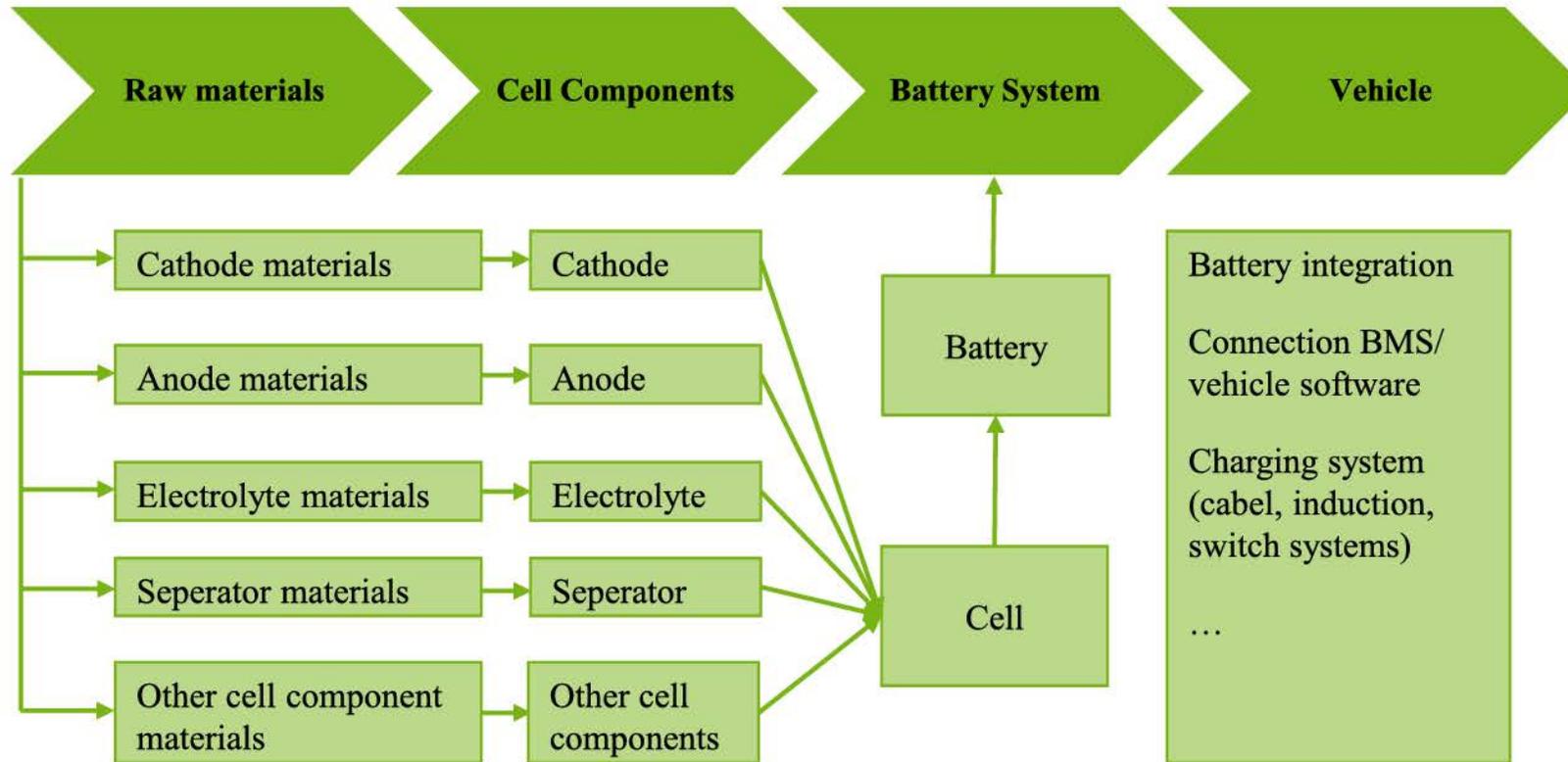


Fig. 1. The battery value chain comprises four major steps from raw materials to the integration in electric vehicles (adapted from [von Delft and Leker \(2011\)](#)).



Value for Money Awards
2014-2015 Car of the Year Awards,
Car Awards Group, Inc.

Highest Ranked Compact Car,
2013 China Initial Quality Study,
J.D. Power Asia Pacific

No.1 Mini Car Brand,
2013 China Brand Power Index,
CHN-Brand Organization

Best Collision Lab Award,
Compact Car Segment,
2013 Automotive Testing
Technology Int'l., UK

Highest Ranked Compact Car,
2011 China Vehicle Dependability,
Study, J.D. Power Asia Pacific

implications and options

diversify business and R&D

inter-firm collaboration

intra-firm integration