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North America Electric Vehicle Battery Components Market - A Regional Analysis: Focus on Vehicle Type, Battery Chemistry, Cell Format, Ecosystem Type, Component Type, Material Type, and Country Analysis - Analysis and Forecast, 2025-2035

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Abstracts

The North America electric vehicle battery components market underpins the region's transition to electrified mobility by supplying the housings, busbars, stamped structures, thermal systems, cell materials, and management electronics that convert cell chemistry into safe, road-ready propulsion. Demand spans the full spectrum of EV platforms, including two- and three-wheelers, passenger cars, commercial trucks and buses, and off-road equipment, and cuts across multiple chemistry families, covering lithium-ion dominant, with legacy lead-acid and emerging chemistries, cell formats (cylindrical, pouch, prismatic), and materials (aluminum housings to copper/aluminum busbars and anode/cathode inputs). The market's evolution is shaped by localization of supply chains, rapid advances in performance and safety, and pack-level architecture shifts toward cell-to-pack and structural integration, all while policy, tariffs, and content rules push production closer to vehicle assembly across the U.S., Canada, and Mexico.

Market Introduction

In 2024, the North America electric vehicle battery components market totaled $13.11 billion. Under the realistic scenario, the market is projected to reach $59.85 billion by 2035, supported by a 14.54% CAGR (2025–2035). Growth reflects surging EV adoption, large-scale investment in localized cell and component manufacturing, and technology improvements that increase energy density, reduce cost, and raise safety margins. Segment expansion beyond light-duty vehicles into commercial fleets and specialty/off-road applications further broadens the addressable base, with larger pack

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sizes amplifying component intensity per vehicle. Structurally, value increase over a period of time across the stack; core electro-materials (anode/cathode) remain the largest slice, while housings, busbars, stamped structures, thermal systems, and BMS hardware scale alongside new gigafactories and pack lines across the region.

The North America electric vehicle battery components market near-term impact is most visible in program cadence, pack performance, and procurement economics. Higher energy density and structural integration (cell-to-pack/cell-to-chassis) free mass and volume that can be redeployed to range or payload, while modular busbar and thermal designs simplify assembly and service. AI-enabled BMS and tighter thermal envelopes improve availability and safety at higher charge rates, supporting faster commissioning and fleet uptime. For procurement, IRA/USMCA content rules and 2024–2025 tariff actions on cells, materials, and sub-assemblies are reshaping award criteria; alongside price, OEMs emphasize domestic footprint, certification against evolving safety standards, traceability, and recycled content pathways to preserve consumer credit eligibility. These forces shorten supplier lists, favor scale players and qualified new entrants, and move award timing earlier in vehicle development as pack architectures converge around standardized interfaces (e.g., NACS-aligned charge ports) and validated enclosure/venting strategies.

Industrial Impact

The industrial footprint is expanding at unprecedented speed. Since 2021, North America has announced scores of gigafactories, cathode/anode plants, separator lines, foil facilities, enclosure casting and machining sites, and recycling hubs, often co-located with OEM assembly campuses. Legacy suppliers are pivoting aggressively; die-casters, stampers, and wiring specialists are retooling into battery housings, structural trays, laminated busbars, and high-voltage interconnects, while materials firms scale cathode precursors and silicon-enhanced anodes. This investment realigns value capture from imports toward regional ecosystems, builds resiliency against global shocks, and seeds long-term capability in midstream processes where historic gaps were most acute.

Market Segmentation:

Segmentation 1: by Vehicle Type

Electric Two-Wheeler

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Electric Three-Wheeler

Electric Passenger Vehicles

Electric Commercial Vehicles

Electric Off-Road Vehicles

Electric Passenger Vehicles to Dominate the North America Electric Vehicle Battery Components Market (by Vehicle Type)

In the North America electric vehicle battery components market, electric passenger vehicles are projected to remain the dominant segment, growing from $12,779.7 million in 2024 to $55,862.2 million by 2035. This dominance reflects the large installed base and ongoing expansion of passenger EV programs, where pack sizes, housings, and anode/cathode content account for the bulk of component demand. Meanwhile, electric commercial vehicles are anticipated to post the fastest growth, expanding from $199.2 million in 2024 to $2,758.7 million by 2035, driven by the electrification of delivery fleets, heavy trucks, and buses. Electric off-road vehicles also show outsized growth potential, rising from $39.3 million in 2024 to $678.5 million by 2035 as mining, construction, and agricultural sectors pursue electrification. Two- and three-wheelers expected to grow from smaller bases ($65.5 million and $26.2 million in 2024) but will likely expand to $353.7 million and $200.9 million, respectively, by 2035. Together, these trends show that while passenger vehicles anchor market value, growth momentum is shifting toward commercial and specialty applications with higher component intensity.

Segmentation 2: by Battery Chemistry

Lead Acid

Lithium-Ion

Others

Lithium-Ion to Lead the North America Electric Vehicle Battery Components Market (by Battery Chemistry)

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The lithium-ion segment is projected to dominate the North America electric vehicle battery components market, expanding from $12,258.0 million in 2024 to $58,190.4 million by 2035. Its leadership reflects broad adoption across passenger and commercial EVs, supported by both high-nickel chemistries for range and lithium-iron-phosphate (LFP) for cost and durability. In contrast, lead-acid batteries are projected to grow modestly from $550.5 million in 2024 to $1,112.2 million by 2035, largely limited to auxiliary and low-voltage applications. The others category (including emerging chemistries and legacy NiMH) is expected to rise from $301.5 million in 2024 to $551.4 million by 2035, remaining niche but strategically important for innovation.

Segmentation 3: by Cell Format

Pouch Cell

Cylindrical Cell

Prismatic Cell

Others

Cylindrical Cell to Dominate the North America Electric Vehicle Battery Components Market (by Cell Format)

Cylindrical cells hold the largest market share in the North America electric vehicle battery components market, growing from $6,396.4 million in 2024 to $26,526.2 million by 2035, supported by deep manufacturing maturity and scaling of 4680-class production. Prismatic cells, however, are projected to experience the fastest growth, rising from $2,034.3 million in 2024 to $21,503.1 million by 2035, as automakers increasingly adopt cell-to-pack and structural pack designs. Pouch cells are expected to expand steadily from $4,089.5 million in 2024 to $10,317.5 million by 2035, maintaining relevance in space-efficient architectures. The others category expected to grow from $589.8 million to $1,507.1 million, underscoring the diversity of form factors in the evolving EV ecosystem.

Segmentation 4: by Component

Battery Housing

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Busbars

Stamping Components (Excluding Busbar Stamping)

Others (Anode and Cathode)

Anode and Cathode Materials to Dominate the North America Electric Vehicle Battery Components Market (by Component)

Among all components, anode and cathode materials represent by far the largest and most critical value pool in the North America electric vehicle battery components market. In 2024, this segment accounted for $11,405.7 million, and it is projected to reach $53,463.7 million by 2035, making it the backbone of the regional supply chain. These electrode materials are fundamental to both cost structure and performance, and they are closely tied to compliance with IRA requirements, making them essential for OEMs aiming to qualify vehicles for consumer incentives. The sharp growth reflects the scale of EV deployment in the region and the strategic push to localize midstream processing of lithium, nickel, cobalt, and graphite.

Segmentation 5: by Material Type

Battery Housing Materials

Steel

Aluminum

GFRP

CFRP

Busbar Materials

Cooper

Aluminum

Others

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Others (Anode and Cathode Materials and Stamping Components)

Cobalt

Lithium

Natural Graphite

Manganese

Others

The battery housing materials segment is expected to grow from $655.5 million in 2024 to $2,719.6 million by 2035 in the North America electric vehicle battery components market, led by aluminum, which expanded from $524.3 million to $2,155.7 million, supported by lightweighting, corrosion resistance, and recyclability. Steel contributed $98.3 million in 2024 and is expected to grow $358.6 million by 2035, retaining importance in rugged, cost-sensitive applications. Composites such as GFRP and CFRP, scaled from $19.8 million and $13.1 million in 2024, are expected to grow $112.5 million and $92.7 million by 2035, respectively, offering thermal and weight advantages in advanced housings.

Segmentation 6: by Country

U.S.

Canada

Mexico

U.S. to Dominate the North America Electric Vehicle Battery Components Market (by Country)

The U.S. is projected to remain the largest and most influential market within North America electric vehicle battery components market. In 2024, the U.S. accounted for $13,107.4 million, and by 2035, this figure is forecasted to rise to $53,270.0 million,

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underscoring its central role in the region's electrification strategy. This growth is anchored by large-scale gigafactory investments from both domestic players and international joint ventures, coupled with strong policy support under the Inflation Reduction Act (IRA). Incentives tied to local sourcing, content rules, and recycling integration have incentivized OEMs and Tier 1 suppliers to localize critical parts of their supply chains in the U.S.

Demand: Drivers, Limitations, and Opportunities

Market Demand Drivers: Rapid Electrification, Policy Support, and Localization

The North America electric vehicle battery components market is experiencing strong demand growth, driven by a convergence of technological, regulatory, and strategic factors. One of the primary drivers is the rapid electrification of passenger vehicles, which continues to anchor the market with large-scale volumes and well-established programs. This demand is being reinforced by the accelerated adoption of commercial fleets, particularly delivery vans, buses, and heavy trucks, where larger battery packs amplify demand for housings, busbars, and high-value electrode materials.

Government policy is another key demand driver. The U.S. Inflation Reduction Act (IRA) has created powerful incentives for both consumers and manufacturers, with credits tied directly to domestic content, critical minerals, and recycling. These measures, combined with USMCA rules of origin and additional tariffs on imported cells and materials, are catalyzing large-scale investment in localized supply chains. In Canada, critical minerals strategies and cathode/anode projects are aligning with automaker commitments to EV production, while Mexico's integration into regional assembly networks is unlocking new opportunities for localized pack and component manufacturing.

Market Challenges: Supply Chain Constraints, Qualification Bottlenecks, and Policy Uncertainty

Despite strong momentum, the North America electric vehicle battery components market faces structural and operational challenges that could constrain growth. Chief among these is the persistent reliance on imported critical minerals and midstream materials such as processed lithium, nickel, and graphite. While new projects are underway in the U.S. and Canada, the ramp-up of mining, refining, and processing capacity will take years, leaving the region exposed to price volatility and geopolitical risks.

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Scale-up bottlenecks also represent a significant challenge. Equipment lead times for electrode processing, stamping, and casting can stretch to 18–24 months, while a shortage of skilled labor, particularly in advanced manufacturing, materials science, and quality control, risks slowing production schedules. Qualification requirements for automakers and regulatory compliance with evolving standards (e.g., UL, SAE, FMVSS updates) further lengthen development cycles, making time-to-market a key constraint for new entrants. Policy uncertainty compounds these challenges. While IRA and USMCA incentives are strong catalysts, future changes in political leadership or trade policy could alter credit eligibility, sourcing requirements, or tariff structures. This creates planning complexity for suppliers making multi-billion-dollar capital commitments.

Market Opportunities: Advanced Materials, Recycling, and Regional Integration

Despite these challenges, the market is rich with opportunities in North America electric vehicle battery components market. Lightweight and high-strength materials, such as aluminum, composites (GFRP, CFRP), and laminated busbars, are creating new avenues for differentiation in housings and interconnects. These innovations directly support automaker targets for range, safety, and cost competitiveness, while also enabling the transition to structural battery designs. Suppliers who invest early in these technologies can capture premium positions in the evolving value chain.

Recycling and resource recovery represent another major opportunity. The rapid scaling of gigafactories is creating a growing stream of manufacturing scrap and, eventually, end-of-life batteries. Facilities capable of recovering lithium, cobalt, nickel, and graphite will not only reduce environmental impact but also provide reliable secondary supply streams that help automakers meet IRA credit eligibility requirements. Companies integrating recycling into their operations can therefore secure long-term partnerships with OEMs and mitigate raw.

How can this report add value to an organization?

Product/Innovation Strategy: The report links chemistry roadmaps and pack design evolution to component implications, covering housings, busbar materials, stamping parts, and electrode inputs. It helps R&D teams align design validation, manufacturability, and safety compliance with the shift toward cell-to-pack and structural architectures.

Growth/Marketing Strategy: The North America electric vehicle battery components

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market presents substantial growth opportunities for both established automotive suppliers and new entrants. Companies are pursuing a mix of strategies, including mergers and acquisitions, joint ventures, and regional capacity expansion to align with the rapid build-out of gigafactories and EV production facilities across the U.S., Canada, and Mexico. Strategic collaborations between OEMs, Tier 1 suppliers, and material specialists are central to securing local supply chains, qualifying components under IRA and USMCA rules, and ensuring long-term program wins.

Competitive Strategy: The report profiles leading players in the North America electric vehicle battery components market, including Magna, Nemak, Dana, Aptiv, Amphenol, Methode, and Interplex, alongside materials specialists such as Albemarle, Umicore, and Redwood Materials. A comprehensive competitive landscape analysis highlights how suppliers are differentiating through process capabilities, regional footprints, recycling integration, and compliance with IRA/USMCA content requirements.

Research Methodology

Factors for Data Prediction and Modelling

The base currency considered for North America electric vehicle battery components market analysis is US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to March 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

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Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of North America electric vehicle battery components market. The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the North America electric vehicle battery components market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of report segmentations and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for the market type

percentage split of individual markets for geographical analysis

Secondary Research

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This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the Census Bureau, OICA, and ACEA.

Secondary research has been done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares
- data for market value
- key industry trends of the top players in the market
- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation
- quantitative data for mathematical and statistical calculations

This report can be delivered within 1 working day.

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Contents

Executive Summary
Scope and Definition

1 MARKET: INDUSTRY OUTLOOK

1.1 Trends: Current and Future Impact Assessment
  1.1.1 Investment Momentum and Supply Chain Localization across North America
  1.1.2 Advances in Battery Technology with Respect to Performance, Safety, and Cost Optimization
  1.1.3 Battery Pack Design Evolution in Terms of Cell-to-Pack and Structural Integration
1.2 Supply Chain Overview
  1.2.1 Key Manufacturers and Suppliers
  1.2.2 Challenges in the Supply Chain
  1.2.3 Value Chain Analysis
1.3 Research and Development Review
  1.3.1 Patent Filing Trend by Country and by Company
1.4 Regulatory Landscape
1.5 Impact Analysis of Tariff
  1.5.1 Effects on Manufacturing
  1.5.2 Supply Chain Shifts
  1.5.3 Pricing Impacts
  1.5.4 Investment Trends
1.6 North America Analysis
  1.6.1 Impact of New EV Charging Standards (e.g., NACS, UL Standards) on Battery Housing
  1.6.2 Federal Initiatives and Policies Impacting EV Battery Housing
  1.6.3 Incentives for EV Manufacturing (e.g., Tax Credits)
  1.6.4 U.S. Battery Recycling Policy
  1.6.5 Battery Management and Environmental Standards (RCRA)
  1.6.6 Analysis of U.S. Government Incentives and their Effect on Battery Housing Pricing
1.7 Market Dynamics Overview
  1.7.1 Market Drivers
    1.7.1.1 Surging EV Adoption and Government Mandates
    1.7.1.2 Expansion into Commercial and Specialty EV Segments (Beyond Light-Duty Vehicles)

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1.7.1.3 Technological Improvements and Battery Cost Decline
1.7.2 Market Challenges
1.7.2.1 Dependence on Imported Materials and Components
1.7.2.2 Scale-Up Bottlenecks and Technology Transfer Challenges
1.7.3 Market Opportunities
1.7.3.1 Lightweight Composite Enclosures and Advanced Materials Innovation
1.7.3.2 Battery Recycling and Resource Recovery Ecosystem
1.7.3.3 Transition of Legacy Auto Suppliers into the EV Battery Component Space

2 APPLICATION

2.1 Application Summary
2.2 North America Electric Vehicle (EV) Battery Components Market (by Vehicle Type)
2.2.1 Electric Two-Wheeler
2.2.2 Electric Three-Wheeler
2.2.3 Electric Passenger Vehicles
2.2.4 Electric Commercial Vehicles
2.2.5 Electric Off-Road Vehicles
2.3 North America Electric Vehicle (EV) Battery Components Market (by Battery Chemistry)
2.3.1 Lead Acid
2.3.2 Lithium-Ion
2.3.3 Others
2.4 North America Electric Vehicle (EV) Battery Components Market (by Cell Format)
2.4.1 Pouch Cell
2.4.2 Cylindrical Cell
2.4.3 Prismatic Cell
2.4.4 Others

3 PRODUCTS

3.1 Product Summary
3.2 North America Electric Vehicle (EV) Battery Components Market (by Component)
3.2.1 Battery Housing
3.2.2 Busbars
3.2.3 Stamping Components (excluding Busbar Stamping)
3.2.4 Others (Anode and Cathode)
3.3 North America Electric Vehicle (EV) Battery Components Market (by Material Type)
3.3.1 Battery Housing Materials

+357 96 030922
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3.3.1.1 Steel
3.3.1.2 Aluminum
3.3.1.3 Glass Fiber Reinforced Plastics (GFRP)
3.3.1.4 Carbon Fiber Reinforced Polymer (CFRP)
3.3.2 Busbar Materials
3.3.2.1 Copper
3.3.2.2 Aluminum
3.3.2.3 Others
3.3.3 Others (Anode and Cathode Materials and Stamping Components)
3.3.3.1 Cobalt
3.3.3.2 Lithium
3.3.3.3 Natural Graphite
3.3.3.4 Manganese
3.3.3.5 Others

4 REGION

4.1 Region Summary
4.2 North America: Drivers and Restraints
4.3 U.S.
4.3.1 Country Overview
4.3.1.1 List of Key Suppliers/Manufacturers of EV Battery Components
4.3.1.2 Driving Factors for Market Growth
4.3.1.3 Factors Challenging the Market
4.3.2 Application
4.3.3 Product
4.4 Canada
4.4.1 Country Overview
4.4.1.1 List of Key Suppliers/Manufacturers of EV Battery Components
4.4.1.2 Driving Factors for Market Growth
4.4.1.3 Factors Challenging the Market
4.4.2 Application
4.4.3 Product
4.5 Mexico
4.5.1 Country Overview
4.5.1.1 List of Key Suppliers/Manufacturers of EV Battery Components
4.5.1.2 Driving Factors for Market Growth
4.5.1.3 Factors Challenging the Market
4.5.2 Application

+357 96 030922
info@marketpublishers.com

4.5.3 Product

5 MARKETS - COMPETITIVE LANDSCAPE AND COMPANY PROFILES

5.1 Next Frontiers
5.2 Geographic Assessment
5.2.1 Market Share Analysis for Leading 10-15 Companies
5.2.2 Strategic Initiatives (Partnerships, Acquisitions, and Product Launches), January 2021 - July 2025
5.3 Competitor Benchmarking
5.3.1 Competitive Advantages and Market Differentiators for Leading Companies
5.3.2 Who Supplies to Whom for Leading Companies
5.3.3 List of Key Electric Vehicle (EV) Battery Component Suppliers/ Manufacturers
5.4 Company Profiles
5.4.1 Magna International Inc.
5.4.1.1 Overview
5.4.1.2 Top Projects/Project Portfolio
5.4.1.3 Top Competitors
5.4.1.4 Partners
5.4.1.5 Key Personnel
5.4.1.6 Analyst View
5.4.1.7 Market Share
5.4.2 Eaton Corporation plc
5.4.2.1 Overview
5.4.2.2 Top Projects/Project Portfolio
5.4.2.3 Top Competitors
5.4.2.4 Partners
5.4.2.5 Key Personnel
5.4.2.6 Analyst View
5.4.2.7 Market Share
5.4.3 The Electric Materials Company (TEMCO)
5.4.3.1 Overview
5.4.3.2 Top Projects/Project Portfolio
5.4.3.3 Top Competitors
5.4.3.4 Partners
5.4.3.5 Key Personnel
5.4.3.6 Analyst View
5.4.3.7 Market Share
5.4.4 Methode Power Solutions Group (Methode Electronics, Inc.)

+357 96 030922
info@marketpublishers.com

5.4.4.1 Overview
5.4.4.2 Top Projects/Project Portfolio
5.4.4.3 Top Competitors
5.4.4.4 Partners
5.4.4.5 Key Personnel
5.4.4.6 Analyst View
5.4.4.7 Market Share
5.4.5 Aptiv Plc
5.4.5.1 Overview
5.4.5.2 Top Projects/Project Portfolio
5.4.5.3 Top Competitors
5.4.5.4 Partners
5.4.5.5 Key Personnel
5.4.5.6 Analyst View
5.4.5.7 Market Share
5.4.6 Amphenol Corporation
5.4.6.1 Overview
5.4.6.2 Top Projects/Project Portfolio
5.4.6.3 Top Competitors
5.4.6.4 Partners
5.4.6.5 Key Personnel
5.4.6.6 Analyst View
5.4.6.7 Market Share
5.4.7 Weiss-Aug Group
5.4.7.1 Overview
5.4.7.2 Top Projects/Project Portfolio
5.4.7.3 Top Competitors
5.4.7.4 Partners
5.4.7.5 Key Personnel
5.4.7.6 Analyst View
5.4.7.7 Market Share
5.4.8 Perfection Spring & Stamping Corp.
5.4.8.1 Overview
5.4.8.2 Top Projects/Project Portfolio
5.4.8.3 Top Competitors
5.4.8.4 Partners
5.4.8.5 Key Personnel
5.4.8.6 Analyst View
5.4.8.7 Market Share

+357 96 030922
info@marketpublishers.com

5.4.9 Standard Die International, Inc
5.4.9.1 Overview
5.4.9.2 Top Projects/Project Portfolio
5.4.9.3 Top Competitors
5.4.9.4 Partners
5.4.9.5 Key Personnel
5.4.9.6 Analyst View
5.4.9.7 Market Share
5.4.10 Nemak
5.4.10.1 Overview
5.4.10.2 Top Projects/Project Portfolio
5.4.10.3 Top Competitors
5.4.10.4 Partners
5.4.10.5 Key Personnel
5.4.10.6 Analyst View
5.4.10.7 Market Share
5.4.11 Interplex PLC
5.4.11.1 Overview
5.4.11.2 Top Projects/Project Portfolio
5.4.11.3 Top Competitors
5.4.11.4 Partners
5.4.11.5 Key Personnel
5.4.11.6 Analyst View
5.4.11.7 Market Share
5.4.12 Dana Incorporated
5.4.12.1 Overview
5.4.12.2 Top Projects/Project Portfolio
5.4.12.3 Top Competitors
5.4.12.4 Partners
5.4.12.5 Key Personnel
5.4.12.6 Analyst View
5.4.12.7 Market Share
5.4.13 Albemarle Corporation
5.4.13.1 Overview
5.4.13.2 Top Projects/Project Portfolio
5.4.13.3 Top Competitors
5.4.13.4 Partners
5.4.13.5 Key Personnel
5.4.13.6 Analyst View

+357 96 030922
info@marketpublishers.com

5.4.13.7 Market Share
5.4.14 Umicore N.V.
5.4.14.1 Overview
5.4.14.2 Top Projects/Project Portfolio
5.4.14.3 Top Competitors
5.4.14.4 Partners
5.4.14.5 Key Personnel
5.4.14.6 Analyst View
5.4.14.7 Market Share
5.4.15 Redwood Materials
5.4.15.1 Overview
5.4.15.2 Top Projects/Project Portfolio
5.4.15.3 Top Competitors
5.4.15.4 Partners
5.4.15.5 Key Personnel
5.4.15.6 Analyst View
5.4.15.7 Market Share

6 RESEARCH METHODOLOGY

6.1 Data Sources
6.1.1 Primary Data Sources
6.1.2 Secondary Data Sources
6.1.3 Data Triangulation
6.2 Market Estimation and Forecast

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List Of Figures

LIST OF FIGURES

Figure 1: North America Electric Vehicle Battery Components Market (by Scenario), $Million, 2025, 2030, and 2035
Figure 2: North America Electric Vehicle Battery Components Market, 2024 and 2035
Figure 3: Countries, North America Electric Vehicle Battery Components Market, $Million, 2024
Figure 4: North America Market Snapshot, 2024
Figure 5: North America Electric Vehicle Battery Components Market, $Million, 2024 and 2035
Figure 6: North America Electric Vehicle Battery Components Market (by Vehicle Type), $Million, 2024, 2030, and 2035
Figure 7: North America Electric Vehicle Battery Components Market (by Battery Chemistry), $Million, 2024, 2030, and 2035
Figure 8: North America Electric Vehicle Battery Components Market (by Cell Format), $Million, 2024, 2030, and 2035
Figure 9: North America Electric Vehicle Battery Components Market (by Component), $Million, 2024, 2030, and 2035
Figure 10: North America Electric Vehicle Battery Components Market (by Material), $Million, 2024, 2030, and 2035
Figure 11: North America Electric Vehicle Battery Components Market Segmentation
Figure 12: Patent Analysis (by Country and Company), January 2022-December 2024
Figure 13: Patent Analysis (by Company), January 2022-December 2024
Figure 14: North America Electric Vehicle Battery Components Market, by Vehicle Type, $Million, 2024, 2030, and 2035
Figure 15: North America Electric Vehicle Battery Components Market, by Battery Chemistry, $Million, 2024, 2030, and 2035
Figure 16: North America Electric Vehicle Battery Components Market, By Cell Format, $Million, 2024, 2030, and 2035
Figure 17: North America Electric Vehicle Battery Components Market, Electric Two-Wheeler, $Million, 2024-2035
Figure 18: North America Electric Vehicle Battery Components Market, Electric Three-Wheeler, $Million, 2024-2035
Figure 19: North America Electric Vehicle Battery Components Market, Electric Passenger Vehicles, $Million, 2024-2035
Figure 20: North America Electric Vehicle Battery Components Market, Electric Commercial Vehicles, $Million, 2024-2035

+357 96 030922
info@marketpublishers.com

Figure 21: North America Electric Vehicle Battery Components Market, Electric Off-Road Vehicles, $Million, 2024-2035
Figure 22: North America Electric Vehicle Battery Components Market, Lead Acid, $Million, 2024-2035
Figure 23: North America Electric Vehicle Battery Components Market, Lithium-Ion, $Million, 2024-2035
Figure 24: North America Electric Vehicle Battery Components Market, Others, $Million, 2024-2035
Figure 25: North America Electric Vehicle Battery Components Market, Pouch Cell, $Million, 2024-2035
Figure 26: North America Electric Vehicle Battery Components Market, Cylindrical Cell, $Million, 2024-2035
Figure 27: North America Electric Vehicle Battery Components Market, Prismatic Cell, $Million, 2024-2035
Figure 28: North America Electric Vehicle Battery Components Market, Others, $Million, 2024-2035
Figure 29: North America Electric Vehicle Battery Components Market, By Component, $Million, 2024, 2030, and 2035
Figure 30: North America Electric Vehicle Battery Components Market, By Material Type, $Million, 2024, 2030, and 2035
Figure 31: North America Electric Vehicle Battery Components Market, Battery Housing, $Million, 2024-2035
Figure 32: North America Electric Vehicle Battery Components Market, Busbars, $Million, 2024-2035
Figure 33: North America Electric Vehicle Battery Components Market, Stamping Components (Excluding Busbar Stamping), $Million, 2024-2035
Figure 34: North America Electric Vehicle Battery Components Market, Others (Anode and Cathode), $Million, 2024-2035
Figure 35: North America Electric Vehicle Battery Components Market, Steel, $Million, 2024-2035
Figure 36: North America Electric Vehicle Battery Components Market, Aluminium, $Million, 2024-2035
Figure 37: North America Electric Vehicle Battery Components Market, Glass Fiber Reinforced Plastics, $Million, 2024-2035
Figure 38: North America Electric Vehicle Battery Components Market, Carbon Fiber Reinforced Polymer, $Million, 2024-2035
Figure 39: North America Electric Vehicle Battery Components Market, Copper, $Million, 2024-2035
Figure 40: North America Electric Vehicle Battery Components Market, Aluminium,

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$Million, 2024-2035
Figure 41: North America Electric Vehicle Battery Components Market, Aluminium, $Million, 2024-2035
Figure 42: North America Electric Vehicle Battery Components Market, Cobalt, $Million, 2024-2035
Figure 43: North America Electric Vehicle Battery Components Market, Lithium, $Million, 2024-2035
Figure 44: North America Electric Vehicle Battery Components Market, Natural Graphite, $Million, 2024-2035
Figure 45: North America Electric Vehicle Battery Components Market, Natural Graphite, $Million, 2024-2035
Figure 46: North America Electric Vehicle Battery Components Market, Others, $Million, 2024-2035
Figure 47: U.S. Electric Car Sales, Million Units, 2022-2024
Figure 48: Geographical Distribution of Cell Components of Nickel-Based Lithium-Ion Battery Supply Chain, 2024
Figure 49: Data Triangulation
Figure 50: Top-Down and Bottom-Up Approach
Figure 51: Assumptions and Limitations

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List Of Tables

LIST OF TABLES

Table 1: Market Snapshot
Table 2: Competitive Landscape Snapshot
Table 3: Key Manufacturers and Suppliers in North America
Table 4: Drivers, Challenges, and Opportunities, 2024-2035
Table 5: Comparison of Battery Housing Materials for EVs
Table 6: Properties of Copper vs. Aluminum Busbar Materials
Table 7: North America Electric Vehicle Battery Components Market (by Country), $Million, 2024-2035
Table 8: North America Electric Vehicle Battery Components Market (by Vehicle Type), $Million, 2024-2035
Table 9: North America Electric Vehicle Battery Components Market (by Battery Chemistry), $Million, 2024-2035
Table 10: North America Electric Vehicle Battery Components Market (by Cell Format), $Million, 2024-2035
Table 11: North America Electric Vehicle Battery Components Market (by Component), $Million, 2024-2035
Table 12: North America Electric Vehicle Battery Components Market (by Material), $Million, 2024-2035
Table 13: U.S. Electric Vehicle Battery Components Market (by Vehicle Type), $Million, 2024-2035
Table 14: U.S. Electric Vehicle Battery Components Market (by Battery Chemistry), $Million, 2024-2035
Table 15: U.S. Electric Vehicle Battery Components Market (by Cell Format), $Million, 2024-2035
Table 16: U.S. Electric Vehicle Battery Components Market (by Component), $Million, 2024-2035
Table 17: U.S. Electric Vehicle Battery Components Market (by Material), $Million, 2024-2035
Table 18: Global Lithium-Ion Battery Supply Chain Ranking, 2024
Table 19: Canada Electric Vehicle Battery Components Market (by Vehicle Type), $Million, 2024-2035
Table 20: Canada Electric Vehicle Battery Components Market (by Battery Chemistry), $Million, 2024-2035
Table 21: Canada Electric Vehicle Battery Components Market (by Cell Format), $Million, 2024-2035

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Table 22: Canada Electric Vehicle Battery Components Market (by Component), $Million, 2024-2035
Table 23: Canada Electric Vehicle Battery Components Market (by Material), $Million, 2024-2035
Table 24: Mexico Electric Vehicle Battery Components Market (by Vehicle Type), $Million, 2024-2035
Table 25: Mexico Electric Vehicle Battery Components Market (by Battery Chemistry), $Million, 2024-2035
Table 26: Mexico Electric Vehicle Battery Components Market (by Cell Format), $Million, 2024-2035
Table 27: Mexico Electric Vehicle Battery Components Market (by Component), $Million, 2024-2035
Table 28: Mexico Electric Vehicle Battery Components Market (by Material), $Million, 2024-2035
Table 29: North America Market Share, 2024
Table 30: Who Supplies to Whom for Leading Companies in North America
Table 31: List of Key Electric Vehicle (EV) Battery Component Suppliers/ Manufacturers

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