

Solid-State Battery Market - A Global and Regional Analysis: Focus on Electrolyte Type, Battery Type, Capacity, Application, and Region - Analysis and Forecast, 2023-2032

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Abstracts

The global solid-state battery market was valued at \$589.8 million in 2022, and it is expected to grow with a CAGR of 33.54% during the forecast period 2023-2032 to reach \$9,037.8 million by 2032. The solid-state battery is driven by several factors, such as the expanding consumer base for consumer electronics and portable devices, the increasing use of advanced battery technologies in electric vehicles, the rapid development of the renewable energy sector, and the increasing adoption of battery energy storage systems.

Introduction to Solid-State Battery

Solid-state batteries are the next generation of high-energy cells that has a similar structure and operation to Li-ion batteries, but instead of liquid electrolyte, they use solid electrolytes. The key benefit of these batteries is their exceptional safety standard. They are flame-retardant or non-flammable and display high thermal stability, which makes them an ideal choice for use in electric vehicles.

As per the findings of the International Energy Agency (IEA), the sales of battery-electric vehicles and plug-in hybrid electric vehicles experienced an almost twofold increase from 2020 to 2021, culminating in a total of 6.6 million units sold. In addition, the number of electric vehicles on the road is expected to reach around 300 million by 2030, accounting for more than 60% of new automobile sales, up from 4.6% in 2020. The expanding electric vehicle market and the increasing recognition of the benefits offered by solid-state batteries are expected to drive the market growth.

In 2022, the global market for solid-state battery technology reached a valuation of \$589.8 million. Over the forecast period, the market is projected to exhibit a CAGR of 33.5%, ultimately reaching a value of \$9,037.8 million by 2032. The market's expansion is predominantly influenced by a multitude of significant factors. These include increasing government support through policies and incentives for the advancement of solid-state battery technology and the adoption of solid-state battery-powered vehicles, technological advancements, and increasing focus on research and development. For instance, in Europe, there are research and innovation alliances such as Batteries Europe, and on the national front, countries such as Germany have launched initiatives such as 'Battery 2020' to facilitate progress in solid-state battery development. These initiatives are instrumental in fostering innovation and growth within the solid-state battery market.

The solid-state battery industry is currently small, but it is projected to experience substantial growth in the near future. The market has attracted significant interest and investment as major companies have been striving to develop and establish their stronghold in the solid-state battery market. For instance, major players, particularly from the automotive industry, such as Ford, Hyundai, Nissan, BMW, Toyota, and Volkswagen, have invested in smaller companies and startups that are developing solid-state battery (SSB) technology.

Market Segmentation:

Segmentation 1: by Application

Electric Vehicle

Passenger Vehicle

Commercial Vehicle

Consumer Electronics

Medical Devices

Energy Storage System

Others

Consumer Electronics to Dominate the Market under the Application Segment

Based on applications, the consumer electronics segment held the largest share of the solid-state battery market in 2022. This could be attributed to the swift urbanization and increased consumer spending on consumer electronics applications such as laptops, smartphones, computers, and other consumer gadgets in developing nations. Furthermore, growing concerns about safety issues related to the use of liquid-based electrolytes in batteries are expected to drive the demand for solid-state batteries in consumer electronics applications.

Segmentation 2: by Electrolyte Type

Polymer

Sulfide

Oxide

Others

Polymer to Dominate the Market under the Electrolyte Type Segment

In 2022, based on electrolyte type, the polymer solid electrolyte segment dominated the overall solid-state battery market in terms of value and volume. Among all solid electrolytes, polymer electrolytes stand out as the most established option in terms of readily available materials and production technologies. Within the category of polymer solid electrolytes, polyethylene oxide (PEO) currently holds the dominant position and is already in commercial use in solid-state batteries (SSBs). Ongoing research and development efforts from players are focused on creating new and innovative polymers. The introduction of these chemistries is expected to further drive market growth.

Segmentation 3: by Battery Type

Thin Film

Bulk

Others

Thin Film to Dominate the Market under the Battery Type Segment

Based on battery type, the thin film segment dominated the market in 2022 due to the evolving requirements of smart devices, which demand improved safety features, higher specific energy and power capabilities, reduced physical size, and enhanced materials. These thin-film batteries have a broad spectrum of applications across diverse sectors, including consumer electronics, wireless sensors, smart cards, medical devices, memory backup power systems, and energy storage solutions for solar cells, among various others.

Segmentation 4: by Capacity

Below 20mAh

20mAh to 500mAh

Above 500mAh

20mAh to 500mAh to Dominate the Market under the Capacity Segment

In 2022, based on capacity, the 20 mAh to 500 mAh capacity segment held the largest market share globally, which was driven by a growing demand for solid-state batteries in applications related to health monitoring, powering discreet wearable devices such as glucose monitors, and temperature sensors. Additionally, compact solid-state batteries in this capacity range played a crucial role in consumer electronics, access control systems, fitness trackers, and others.

Segmentation 5: by Region

North America - U.S., Canada, Mexico.

Europe - Germany, France, Italy, Spain, and Rest-of-Europe

China

U.K.

Asia-Pacific - Japan, South Korea, India, Taiwan, and Rest-of-Asia-Pacific

Rest-of-the-World - South America, Middle East and Africa

During the forecast period, based on region, North America and Europe is projected to witness substantial demand for solid-state batteries, owing to the presence of significant players such as QuantumScape Corporation, Ionic Materials Inc., BrightVolt Solid State Batteries, Solid Power, Inc., and Factorial Inc. Furthermore, North America boasts one of the most mature electric vehicle markets globally, primarily due to the presence of key players such as Tesla, Inc. and General Motors, among others. These companies have been at the forefront of electric vehicle and electric vehicles battery technology development. As these influential industry leaders continue to push the boundaries of EV innovation, the demand for high-performance solid-state EV batteries is expected to surge.

The key players operating in the solid-state battery include STMicroelectronics N.V., Toyota Motor Corporation, SAMSUNG SDI CO., LTD, Hitachi Zosen Corporation, and ProLogium Technology Co., Ltd. These companies are focusing on strategic partnerships, collaborations, and acquisitions to enhance their product offerings and expand their market presence. Hence, the market for solid-state battery technology has been growing and evolving significantly because of factors such as the rising focus on reducing greenhouse gas emissions and transitioning to solid-state battery vehicles, supportive regulations, subsidies, and increasing demand for safe compact batteries in the medical devices industry.

Recent Developments in the Global Solid-State Battery Market

In August 2023, Blue Solutions, a subsidiary of the Bolloré Group, entered into a framework agreement with the Bern University of Applied Sciences (BFH). Under this agreement, the two entities intend to collaborate, sharing expertise and engaging in cooperative ventures related to the utilization of big-data analysis and machine-learning techniques applied to data related to the production and utilization of solid-state batteries.

In June 2023, ProLogium introduced its second-generation solid-state battery named

the Large-Footprint Lithium Ceramic Battery (LLCB). This advanced battery showcases a remarkable two-fold rise in volumetric energy density in contrast to a standard 2170 round-cell battery pack. Notably, these strides have been accomplished alongside a reduction in the overall battery pack weight and the number of incorporated cells. The company asserts a significant weight decrease, possibly reaching 115 kilograms.

In June 2023, StoreDot joined forces with VinES, an energy solutions provider and a subsidiary of Vingroup, Vietnam's largest private conglomerate. This partnership builds upon VinFast's previously announced investment in StoreDot, marking a significant step forward in their collaborative efforts to advance cell technology. Currently, both companies are gearing up to introduce extreme fast charging (XFC) battery solutions tailored for the green mobility sector, including VinFast's electric vehicles.

- In June 2022, Solid Power, Inc. announced the installation of its pilot production line, referred to as the 'EV Cell Pilot Line.' This specialized production setup is specifically tailored to manufacture solid-state cells at a scale suitable for electric vehicles (EVs).

Demand – Drivers, Limitations, and Opportunities

Market Demand Drivers: Growing Concerns Related to Lithium-Ion Battery Failure and Explosion

The growing concerns related to lithium-ion battery failure and the associated risk of explosion have become a significant driving force behind the increasing demand for solid-state batteries. Lithium-ion batteries, while widely used in various applications, including consumer electronics, electric vehicles, and renewable energy storage, have exhibited safety issues that have led to high-profile incidents. For instance, in May 2023, an incident occurred in Augusta, U.S., involving a car explosion attributed to the failure of a lithium-ion battery. One of the primary concerns with lithium-ion batteries is the use of flammable liquid electrolytes in them. When these batteries are subjected to extreme conditions, such as overcharging, physical damage, or exposure to high temperatures, they can undergo thermal runaway, a chain reaction leading to overheating, fires, and even explosions. These safety risks have been associated with product recalls, accidents, and concerns over the safety of electric vehicles.

In response to these concerns, solid-state batteries and other batteries such as sodium-ion batteries have emerged as a promising alternative. Solid-state batteries replace the flammable liquid electrolytes with solid electrolytes, making them significantly less prone to thermal runaway and explosion. This enhanced safety profile is a critical driver of

their demand, especially in applications where safety is paramount, such as electric vehicles, aerospace, and grid-scale energy storage.

Furthermore, the demand for solid-state batteries has been amplified by their potential to improve energy density, increase longevity, and reduce charging times compared to traditional lithium-ion batteries. These attributes not only enhance safety but also offer superior performance benefits, making them an attractive choice for a wide range of applications.

Market Challenges: Lack of Industrial Supply Chain

The absence of a well-established industrial supply chain stands as a tough challenge in the solid-state battery market. Solid-state batteries are still in their early stages of development and commercialization. This supply chain deficit is compounded by several factors. Firstly, the manufacturing infrastructure for solid-state batteries is limited and necessitates specialized equipment and processes, resulting in substantial costs and time investments.

Additionally, these advanced batteries often rely on unique materials and components that lack a robust supplier base, making it challenging to source these materials reliably and cost-effectively in the quantities required for mass production. Quality control and testing protocols tailored to solid-state batteries must also be developed, which further adds to their complexity.

As demand for solid-state batteries continues to rise, manufacturers are confronted with the complex task of scaling up production capacity, requiring significant investments, workforce training, and consistent product quality assurance.

Furthermore, as a relatively novel technology, solid-state batteries may face evolving regulatory and safety standards, demanding rigorous compliance efforts. Collaborative initiatives involving researchers, solid-state battery manufacturers, government entities, and material suppliers are indispensable in bridging this supply chain gap.

Market Opportunities: Rising Popularity of Solid-State Batteries in the Medical Sector

The increasing popularity of solid-state batteries within the medical sector represents a significant opportunity for the broader solid-state battery market. In medical applications, where reliability, safety, and long-term performance are paramount, solid-state batteries offer a host of advantages that position them as a highly attractive energy storage

solution. The medical sector often involves implantable devices, such as pacemakers and neurostimulators, where any risk of battery failure can have life-threatening consequences. Solid-state batteries, with their non-flammable solid electrolytes, virtually eliminate the risk of thermal runaway or leakage, ensuring the safety of patients and the longevity of these critical medical devices.

Furthermore, solid-state batteries' compact and lightweight design is advantageous for implantable and portable medical devices, enhancing patient comfort and mobility. Their high energy density allows for longer device lifespans between battery replacements or recharging, reducing the frequency of medical procedures and associated patient risks.

Additionally, as medical technology continues to advance, the demand for miniaturization and increased functionality in devices grows. Solid-state batteries, with their potential for customization and high-performance characteristics, align well with these evolving needs.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different polymers used for solid-state battery and their potential globally. Moreover, the study gives the reader a detailed understanding of the different solutions provided by the solid-state battery providers, encompassing aspects such as battery capacity and battery type. In contrast to traditional batteries, solid-state batteries exhibit outstanding thermal resilience, a comparatively lower self-discharge rate, heightened tolerance, and non-flammability.

Growth/Marketing Strategy: The global solid-state battery market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnership, collaboration, and joint venture activities to strengthen their position in the global solid-state battery market.

Competitive Strategy: Key players in the global solid-state battery market analyzed and profiled in the study involve solid-state battery-based product manufacturers, including market segments covered by distinct electrolyte types, capacity, battery type, applications served, and regional presence, as well as the influence of important market tactics. Moreover, a detailed competitive benchmarking of the players operating in the global solid-state battery market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally,

comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The scope of this report has been focused on various types of solid-state batteries.

The market revenue has been calculated based on the global demand for solid-state batteries, as well as upcoming and already announced projects.

The base currency considered for the 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 2019 to June 2023 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 have been employed.

Any future economic downturn has not been considered for the market estimation and forecast.

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

Primary Research

The primary sources involve the solid-state battery industry experts and stakeholders such as data suppliers, platform developers, and service providers. Respondents such as vice presidents, CEOs, marketing directors, and technology and innovation directors have been interviewed to verify this research study's qualitative and quantitative aspects.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of reports segmentation and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for market type
- percentage split of individual markets for region-wise analysis

Secondary Research

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 aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as <https://www.euspa.europa.eu/> and <https://www.worldbank.org/en/home>.

Secondary research was 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.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Of the top players profiled in the report, the private companies operating in the global solid-state battery market accounted for around 55% of the market share in 2022, while the public companies operating in the market captured around 45% of the market share.

Some Prominent Names Established in the Market are:

Company Type 1: Public Companies

Bolloré Group

QuantumScape Corporation

Toyota Motor Corporation

STMicroelectronics N.V.

SAMSUNG SDI CO., LTD.

Solid Power, Inc.

Hitachi Zosen Corporation

Ilika plc

Ganfeng Lithium Group Co., Ltd.

Company Type 2: Private Companies

ProLogium Technology Co., Ltd.

Ionic Materials Inc

Prieto Battery Inc.

BrightVolt Solid State Batteries

StoreDot

Factorial Inc.

theion GmbH

Sakuu Corporation

Ion Storage Systems

SK on Co., Ltd.

Natrion Inc.

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