

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 Bollere 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

Bollere 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.

Natruon Inc.

Contents

1 MARKETS

1.1 Industry Outlook

1.1.1 Trends: Current and Future

1.1.1.1 Growing Support from the Government Through Investment in Advanced Energy Storage Technologies

1.1.1.2 Increasing R&D Activities on Solid-State Battery

1.1.2 Supply Chain Analysis

1.1.3 Ecosystem/Ongoing Programs

1.1.3.1 Consortiums and Associations

1.1.3.2 Regulatory Bodies

1.1.3.3 Government Programs

1.1.3.4 Programs by Research Institutions and Universities

1.1.4 Comparative Analysis

1.1.4.1 Lithium-Ion Batteries vs. Solid-State Batteries

1.1.4.2 Comparison in Terms of Power Density of Various Batteries

1.1.5 12. List of Key Planned Solid-State Battery Projects

1.1.6 Future of Solid-State Battery in EVs and the Role of EV Manufacturers in Advancing Solid-State Battery Development

1.1.6.1 Current Market Outlook

1.1.6.2 Research and Development

1.1.6.2.1 Solid-State Battery with Pure Silicon Anode

1.1.6.2.2 Recent Electrode Design of MIT's Solid-State Battery

1.1.6.3 Future Market Outlook

1.1.7 Impact of COVID-19 on the Solid-State Battery Market

1.2 Snapshot of Sodium-Ion Battery Market

1.2.1 Leading Countries in the Sodium-Ion Battery Market

1.2.2 Leading Companies in the Sodium-Ion Battery Market

1.2.3 Sodium-Ion Battery Market Projections

1.3 Business Dynamics

1.3.1 Business Drivers

1.3.1.1 Rising Renewable Energy Generation

1.3.1.2 Rapid Growth of the Electric Vehicle Market

1.3.1.3 Growing Concerns Related to Lithium-Ion Battery Failure and Explosion

1.3.2 Business Challenges

1.3.2.1 Intense Competition from Other Advanced Battery Technologies

1.3.2.2 Lack of Industrial Supply Chain

- 1.3.3 Business Strategies
 - 1.3.3.1 Product Development
 - 1.3.3.2 Market Development
- 1.3.4 Corporate Strategies
 - 1.3.4.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
- 1.3.5 Business Opportunities
 - 1.3.5.1 Rising Popularity of Solid-State Batteries in the Medical Sector
 - 1.3.5.2 Advancements in Solid-State Battery Technologies and Chemistries
- 1.4 Start-Up Landscape
 - 1.4.1 Key Start-Ups in the Ecosystem

2 APPLICATION

- 2.1 Global Solid-State Battery Market (Applications and Specifications)
 - 2.1.1 Global Solid-State Battery Market (by Application)
 - 2.1.2 Electric Vehicle
 - 2.1.2.1 Passenger Vehicle
 - 2.1.2.2 Commercial Vehicle
 - 2.1.3 Consumer Electronics
 - 2.1.4 Energy Storage Systems
 - 2.1.5 Medical Devices
 - 2.1.6 Others
- 2.2 Demand Analysis of Solid-State Battery Market (by Application), Value and Volume Data

3 PRODUCT

- 3.1 Global Solid-State Battery Market (Products and Specifications)
 - 3.1.1 Global Solid-State Battery Market (by Electrolyte Type)
 - 3.1.2 Polymer
 - 3.1.3 Sulfide
 - 3.1.4 Oxide
 - 3.1.5 Others
- 3.2 Demand Analysis of Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
- 3.3 Global Solid-State Battery Market (Products and Specifications)
 - 3.3.1 Global Solid-State Battery Market (by Battery Type)
 - 3.3.2 Thin Film
 - 3.3.3 Bulk

- 3.3.4 Others
- 3.4 Demand Analysis of Solid-State Battery Market (by Battery Type), Value and Volume Data
- 3.5 Global Solid-State Battery Market (Products and Specifications)
 - 3.5.1 Global Solid-State Battery Market (by Capacity)
 - 3.5.2 Below 20mAh
 - 3.5.3 20mAh-500mAh
 - 3.5.4 Above 500mAh
- 3.6 Demand Analysis of Solid-State Battery Market (by Capacity), Value and Volume Data
- 3.7 Product Benchmarking: Growth Rate – Market Share Matrix, 2022
- 3.8 Patent Analysis
 - 3.8.1 Patent Analysis (by Status)
 - 3.8.2 Patent Analysis (by Organization)
- 3.9 Global and Regional Level: Average Pricing Analysis

4 REGION

- 4.1 North America
 - 4.1.1 Market
 - 4.1.1.1 Key Manufacturers/Suppliers in North America
 - 4.1.1.2 Business Drivers
 - 4.1.1.3 Business Challenges
 - 4.1.1.4 Application
 - 4.1.1.4.1 North America Solid-State Battery Market (by Application), Value and Volume Data
 - 4.1.1.5 Product
 - 4.1.1.5.1 North America Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
 - 4.1.1.5.2 North America Solid-State Battery Market (by Battery Type), Value and Volume Data
 - 4.1.1.5.3 North America Solid-State Battery Market (by Capacity), Value and Volume Data
 - 4.1.2 North America (by Country)
 - 4.1.2.1 U.S.
 - 4.1.2.1.1 Market
 - 4.1.2.1.1.1 Buyer Attributes
 - 4.1.2.1.1.2 Key Manufacturers/Suppliers in the U.S.
 - 4.1.2.1.1.3 Regulatory Landscape

- 4.1.2.1.1.4 Business Drivers
- 4.1.2.1.1.5 Business Challenges
- 4.1.2.1.2 Application
 - 4.1.2.1.2.1 U.S. Solid-State Battery Market (by Application), Value and Volume Data
- 4.1.2.1.3 Product
 - 4.1.2.1.3.1 U.S. Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
 - 4.1.2.1.3.2 U.S. Solid-State Battery Market (by Battery Type), Value and Volume Data
 - 4.1.2.1.3.3 U.S. Solid-State Battery Market (by Capacity), Value and Volume Data
- 4.1.2.2 Canada
 - 4.1.2.2.1 Market
 - 4.1.2.2.1.1 Buyer Attributes
 - 4.1.2.2.1.2 Key Manufacturers/Suppliers in Canada
 - 4.1.2.2.1.3 Business Drivers
 - 4.1.2.2.1.4 Business Challenges
 - 4.1.2.2.2 Application
 - 4.1.2.2.2.1 Canada Solid-State Battery Market (by Application), Value and Volume Data
 - 4.1.2.2.3 Product
 - 4.1.2.2.3.1 Canada Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
 - 4.1.2.2.3.2 Canada Solid-State Battery Market (by Battery Type), Value and Volume Data
 - 4.1.2.2.3.3 Canada Solid-State Battery Market (by Capacity), Value and Volume Data
- 4.1.2.3 Mexico
 - 4.1.2.3.1 Market
 - 4.1.2.3.1.1 Buyer Attributes
 - 4.1.2.3.1.2 Key Manufacturers/Suppliers in Mexico
 - 4.1.2.3.1.3 Business Drivers
 - 4.1.2.3.1.4 Business Challenges
 - 4.1.2.3.2 Application
 - 4.1.2.3.2.1 Mexico Solid-State Battery Market (by Application), Value and Volume Data
 - 4.1.2.3.3 Product
 - 4.1.2.3.3.1 Mexico Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.1.2.3.3.2 Mexico Solid-State Battery Market (by Battery Type), Value and Volume Data

4.1.2.3.3.3 Mexico Solid-State Battery Market (by Capacity), Value and Volume Data

4.2 Europe

4.2.1 Market

4.2.1.1 Key Manufacturers/Suppliers in Europe

4.2.1.2 Business Drivers

4.2.1.3 Business Challenges

4.2.1.3.1 Application

4.2.1.3.1.1 Europe Solid-State Battery Market (by Application), Value and Volume Data

4.2.1.3.2 Product

4.2.1.3.2.1 Europe Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.2.1.3.2.2 Europe Solid-State Battery Market (by Battery Type), Value and Volume Data

4.2.1.3.2.3 Europe Solid-State Battery Market (by Capacity), Value and Volume Data

4.2.2 Europe (by Country)

4.2.2.1 Germany

4.2.2.1.1 Market

4.2.2.1.1.1 Buyer Attributes

4.2.2.1.1.2 Key Manufacturers/Suppliers in Germany

4.2.2.1.1.3 Business Drivers

4.2.2.1.1.4 Business Challenges

4.2.2.1.2 Application

4.2.2.1.2.1 Germany Solid-State Battery Market (by Application), Value and Volume Data

4.2.2.1.3 Product

4.2.2.1.3.1 Germany Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.2.2.1.3.2 Germany Solid-State Battery Market (by Battery Type), Value and Volume Data

4.2.2.1.3.3 Germany Solid-State Battery Market (by Capacity), Value and Volume Data

4.2.2.2 France

4.2.2.2.1 Market

4.2.2.2.1.1 Buyer Attributes

4.2.2.2.1.2 Key Manufacturers/Suppliers in France

4.2.2.2.1.3 Business Drivers

4.2.2.2.1.4 Business Challenges

4.2.2.2.2 Application

4.2.2.2.2.1 France Solid-State Battery Market (by Application), Value and Volume

Data

4.2.2.2.3 Product

4.2.2.2.3.1 France Solid-State Battery Market (by Electrolyte Type), Value and

Volume Data

4.2.2.2.3.2 France Solid-State Battery Market (by Battery Type), Value and Volume

Data

4.2.2.2.3.3 France Solid-State Battery Market (by Capacity), Value and Volume

Data

4.2.2.3 Italy

4.2.2.3.1 Market

4.2.2.3.1.1 Buyer Attributes

4.2.2.3.1.2 Key Manufacturers/Suppliers in Italy

4.2.2.3.1.3 Business Drivers

4.2.2.3.1.4 Business Challenges

4.2.2.3.2 Application

4.2.2.3.2.1 Italy Solid-State Battery Market (by Application), Value and Volume

Data

4.2.2.3.3 Product

4.2.2.3.3.1 Italy Solid-State Battery Market (by Electrolyte Type), Value and

Volume Data

4.2.2.3.3.2 Italy Solid-State Battery Market (by Battery Type), Value and Volume

Data

4.2.2.3.3.3 Italy Solid-State Battery Market (by Capacity), Value and Volume Data

4.2.2.4 Spain

4.2.2.4.1 Market

4.2.2.4.1.1 Buyer Attributes

4.2.2.4.1.2 Key Manufacturers/Suppliers in Spain

4.2.2.4.1.3 Business Drivers

4.2.2.4.1.4 Business Challenges

4.2.2.4.2 Application

4.2.2.4.2.1 Spain Solid-State Battery Market (by Application), Value and Volume

Data

4.2.2.4.3 Product

4.2.2.4.3.1 Spain Solid-State Battery Market (by Electrolyte Type), Value and

Volume Data

4.2.2.4.3.2 Spain Solid-State Battery Market (by Battery Type), Value and Volume

Data

4.2.2.4.3.3 Spain Solid-State Battery Market (by Capacity), Value and Volume

Data

4.2.2.5 Rest-of-Europe (RoE)

4.2.2.5.1 Market

4.2.2.5.1.1 Buyer Attributes

4.2.2.5.1.2 Key Manufacturers/Suppliers in Rest-of-Europe

4.2.2.5.1.3 Business Drivers

4.2.2.5.1.4 Business Challenges

4.2.2.5.2 Application

4.2.2.5.2.1 Rest-of-Europe Solid-State Battery Market (by Application), Value and

Volume Data

4.2.2.5.3 Product

4.2.2.5.3.1 Rest-of-Europe Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.2.2.5.3.2 Rest-of-Europe Solid-State Battery Market (by Battery Type), Value and Volume Data

4.2.2.5.3.3 Rest-of-Europe Solid-State Battery Market (by Capacity), Value and Volume Data

4.3 U.K.

4.3.1 Market

4.3.1.1 Buyer Attributes

4.3.1.2 Key Manufacturers/Suppliers in the U.K.

4.3.1.3 Business Drivers

4.3.1.4 Business Challenges

4.3.1.4.1 Application

4.3.1.4.1.1 U.K. Solid-State Battery Market (by Application), Value and Volume

Data

4.3.1.4.2 Product

4.3.1.4.2.1 U.K. Solid-State Battery Market (by Electrolyte Type), Value and

Volume Data

4.3.1.4.2.2 U.K. Solid-State Battery Market (by Battery Type), Value and Volume

Data

4.3.1.4.2.3 U.K. Solid-State Battery Market (by Capacity), Value and Volume Data

4.4 China

4.4.1 Market

4.4.1.1 Buyer Attributes

4.4.1.2 Key Manufacturers/Suppliers in China

4.4.1.3 Business Drivers

4.4.1.4 Business Challenges

4.4.1.4.1 Application

4.4.1.4.1.1 China Solid-State Battery Market (by Application), Value and Volume

Data

4.4.1.4.2 Product

4.4.1.4.2.1 China Solid-State Battery Market (by Electrolyte Type), Value and

Volume Data

4.4.1.4.2.2 China Solid-State Battery Market (by Battery Type), Value and Volume

Data

4.4.1.4.2.3 China Solid-State Battery Market (by Capacity), Value and Volume

Data

4.5 Asia-Pacific and Japan

4.5.1 Market

4.5.1.1 Key Manufacturers/Suppliers in Asia-Pacific and Japan

4.5.1.2 Business Drivers

4.5.1.3 Business Challenges

4.5.1.3.1 Application

4.5.1.3.1.1 Asia-Pacific and Japan Solid-State Battery Market (by Application),

Value and Volume Data

4.5.1.3.2 Product

4.5.1.3.2.1 Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte

Type), Value and Volume Data

4.5.1.3.2.2 Asia-Pacific and Japan Solid-State Battery Market (by Battery Type),

Value and Volume Data

4.5.1.3.2.3 Asia-Pacific and Japan Solid-State Battery Market (by Capacity), Value

and Volume Data

4.5.2 Asia-Pacific and Japan (by Country)

4.5.2.1 Japan

4.5.2.1.1 Market

4.5.2.1.1.1 Buyer Attributes

4.5.2.1.1.2 Key Manufacturers/Suppliers in Japan

4.5.2.1.1.3 Business Drivers

4.5.2.1.1.4 Business Challenges

4.5.2.1.2 Application

4.5.2.1.2.1 Japan Solid-State Battery Market (by Application), Value and Volume

Data

4.5.2.1.3 Product

4.5.2.1.3.1 Japan Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.5.2.1.3.2 Japan Solid-State Battery Market (by Battery Type), Value and Volume Data

4.5.2.1.3.3 Japan Solid-State Battery Market (by Capacity), Value and Volume Data

4.5.2.2 South Korea

4.5.2.2.1 Market

4.5.2.2.1.1 Buyer Attributes

4.5.2.2.1.2 Key Manufacturers/Suppliers in South Korea

4.5.2.2.1.3 Business Drivers

4.5.2.2.1.4 Business Challenges

4.5.2.2.2 Application

4.5.2.2.2.1 South Korea Solid-State Battery Market (by Application), Value and Volume Data

4.5.2.2.3 Product

4.5.2.2.3.1 South Korea Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.5.2.2.3.2 South Korea Solid-State Battery Market (by Battery Type), Value and Volume Data

4.5.2.2.3.3 South Korea Solid-State Battery Market (by Capacity), Value and Volume Data

4.5.2.3 India

4.5.2.3.1 Market

4.5.2.3.1.1 Buyer Attributes

4.5.2.3.1.2 Key Manufacturers/Suppliers in India

4.5.2.3.1.3 Business Drivers

4.5.2.3.1.4 Business Challenges

4.5.2.3.2 Application

4.5.2.3.2.1 India Solid-State Battery Market (by Application), Value and Volume Data

4.5.2.3.3 Product

4.5.2.3.3.1 India Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.5.2.3.3.2 India Solid-State Battery Market (by Battery Type), Value and Volume Data

4.5.2.3.3.3 India Solid-State Battery Market (by Capacity), Value and Volume Data

4.5.2.4 Taiwan

4.5.2.4.1 Market

- 4.5.2.4.1.1 Buyer Attributes
- 4.5.2.4.1.2 Key Manufacturers/Suppliers in Taiwan
- 4.5.2.4.1.3 Business Drivers
- 4.5.2.4.1.4 Business Challenges
- 4.5.2.4.2 Application
 - 4.5.2.4.2.1 Taiwan Solid-State Battery Market (by Application), Value and Volume Data
- 4.5.2.4.3 Product
 - 4.5.2.4.3.1 Taiwan Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
 - 4.5.2.4.3.2 Taiwan Solid-State Battery Market (by Battery Type), Value and Volume Data
 - 4.5.2.4.3.3 Taiwan Solid-State Battery Market (by Capacity), Value and Volume Data
- 4.5.2.5 Rest-of-Asia-Pacific and Japan
 - 4.5.2.5.1 Market
 - 4.5.2.5.1.1 Buyer Attributes
 - 4.5.2.5.1.2 Key Manufacturers/Suppliers in Rest-of-Asia-Pacific and Japan
 - 4.5.2.5.1.3 Business Drivers
 - 4.5.2.5.1.4 Business Challenges
 - 4.5.2.5.2 Application
 - 4.5.2.5.2.1 Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Application), Value and Volume Data
 - 4.5.2.5.3 Product
 - 4.5.2.5.3.1 Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte Type), Value and Volume Data
 - 4.5.2.5.3.2 Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Battery Type), Value and Volume Data
 - 4.5.2.5.3.3 Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Capacity), Value and Volume Data
- 4.6 Rest-of-the-World
 - 4.6.1 Market
 - 4.6.1.1 Key Manufacturers/Suppliers in Rest-of-the-World
 - 4.6.1.2 Business Drivers
 - 4.6.1.3 Business Challenges
 - 4.6.1.3.1 Application
 - 4.6.1.3.1.1 Rest-of-the-World Solid-State Battery Market (by Application), Value and Volume Data
 - 4.6.1.3.2 Product

4.6.1.3.2.1 Rest-of-the-World Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.6.1.3.2.2 Rest-of-the-World Solid-State Battery Market (by Battery Type), Value and Volume Data

4.6.1.3.2.3 Rest-of-the-World Solid-State Battery Market (by Capacity), Value and Volume Data

4.6.2 Rest-of-the-World (by Region)

4.6.2.1 South America

4.6.2.1.1 Market

4.6.2.1.1.1 Buyer Attributes

4.6.2.1.1.2 Key Manufacturers/Suppliers in South America

4.6.2.1.1.3 Business Drivers

4.6.2.1.1.4 Business Challenges

4.6.2.1.2 Application

4.6.2.1.2.1 South America Solid-State Battery Market (by Application), Value and Volume Data

4.6.2.1.3 Product

4.6.2.1.3.1 South America Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.6.2.1.3.2 South America Solid-State Battery Market (by Battery Type), Value and Volume Data

4.6.2.1.3.3 South America Solid-State Battery Market (by Capacity), Value and Volume Data

4.6.2.2 Middle East and Africa

4.6.2.2.1 Market

4.6.2.2.1.1 Buyer Attributes

4.6.2.2.1.2 Key Manufacturers/Suppliers in the Middle East and Africa

4.6.2.2.1.3 Business Drivers

4.6.2.2.1.4 Business Challenges

4.6.2.2.2 Application

4.6.2.2.2.1 Middle East and Africa Solid-State Battery Market (by Application), Value and Volume Data

4.6.2.2.3 Product

4.6.2.2.3.1 Middle East and Africa Solid-State Battery Market (by Electrolyte Type), Value and Volume Data

4.6.2.2.3.2 Middle East and Africa Solid-State Battery Market (by Battery Type), Value and Volume Data

4.6.2.2.3.3 Middle East and Africa Solid-State Battery Market (by Capacity), Value and Volume Data

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

5.1 Competitive Benchmarking

5.1.1 Competitive Position Matrix

5.1.2 Product Matrix for Key Companies

5.1.3 Market Share Analysis of Key Companies, 2022

5.2 Company Profiles

5.2.1 Bollore Group

5.2.1.1 Company Overview

5.2.1.1.1 Role of Bollore Group in the Solid-State Battery Market

5.2.1.1.2 Product Portfolio

5.2.1.2 Corporate Strategies

5.2.1.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

5.2.1.3 R&D Analysis

5.2.1.4 Analyst View

5.2.2 ProLogium Technology Co., Ltd.

5.2.2.1 Company Overview

5.2.2.1.1 Role of ProLogium Technology Co., Ltd. in the Solid-State Battery Market

5.2.2.1.2 Product Portfolio

5.2.2.2 Business Strategies

5.2.2.2.1 Product Development

5.2.2.3 Corporate Strategies

5.2.2.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

5.2.2.4 Analyst View

5.2.3 QuantumScape Corporation

5.2.3.1 Company Overview

5.2.3.1.1 Role of QuantumScape Corporation in the Solid-State Battery Market

5.2.3.1.2 Product Portfolio

5.2.3.2 Corporate Strategies

5.2.3.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts

5.2.3.3 Analyst View

5.2.4 Toyota Motor Corporation

5.2.4.1 Company Overview

5.2.4.1.1 Role of Toyota Motor Corporation in the Solid-State Battery Market

5.2.4.1.2 Product Portfolio

5.2.4.2 R&D Analysis

5.2.4.3 Analyst View

5.2.5 Ionic Materials Inc

- 5.2.5.1 Company Overview
 - 5.2.5.1.1 Role of Ionic Materials Inc in the Solid-State Battery Market
 - 5.2.5.1.2 Product Portfolio
- 5.2.5.2 Analyst View
- 5.2.6 STMicroelectronics N.V.
 - 5.2.6.1 Company Overview
 - 5.2.6.1.1 Role of STMicroelectronics N.V. in the Solid-State Battery Market
 - 5.2.6.1.2 Product Portfolio
 - 5.2.6.2 R&D Analysis
 - 5.2.6.3 Analyst View
- 5.2.7 SAMSUNG SDI CO., LTD.
 - 5.2.7.1 Company Overview
 - 5.2.7.1.1 Role of SAMSUNG SDI CO., LTD. in the Solid-State Battery Market
 - 5.2.7.1.2 Product Portfolio
 - 5.2.7.2 Business Strategies
 - 5.2.7.2.1 Market Development
 - 5.2.7.3 R&D Analysis
 - 5.2.7.4 Analyst View
- 5.2.8 Prieto Battery Inc.
 - 5.2.8.1 Company Overview
 - 5.2.8.1.1 Role of Prieto Battery Inc. in the Solid-State Battery Market
 - 5.2.8.1.2 Product Portfolio
 - 5.2.8.2 Corporate Strategies
 - 5.2.8.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.8.3 Analyst View
- 5.2.9 BrightVolt Solid State Batteries.
 - 5.2.9.1 Company Overview
 - 5.2.9.1.1 Role of BrightVolt Solid State Batteries. in the Solid-State Battery Market
 - 5.2.9.1.2 Product Portfolio
 - 5.2.9.2 Analyst View
- 5.2.10 Solid Power, Inc.
 - 5.2.10.1 Company Overview
 - 5.2.10.1.1 Role of Solid Power, Inc. in the Solid-State Battery Market
 - 5.2.10.1.2 Product Portfolio
 - 5.2.10.2 Business Strategies
 - 5.2.10.2.1 Market Development
 - 5.2.10.3 Corporate Strategies
 - 5.2.10.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.10.4 R&D Analysis

- 5.2.10.5 Analyst View
- 5.2.11 Hitachi Zosen Corporation
 - 5.2.11.1 Company Overview
 - 5.2.11.1.1 Role of Hitachi Zosen Corporation in the Solid-State Battery Market
 - 5.2.11.1.2 Product Portfolio
 - 5.2.11.2 Business Strategies
 - 5.2.11.2.1 Product Development
 - 5.2.11.3 Analyst View
- 5.2.12 Ilika plc
 - 5.2.12.1 Company Overview
 - 5.2.12.1.1 Role of Ilika plc in the Solid-State Battery Market
 - 5.2.12.1.2 Product Portfolio
 - 5.2.12.2 Business Strategies
 - 5.2.12.2.1 Product Development
 - 5.2.12.3 Business Strategies
 - 5.2.12.3.1 Market Development
 - 5.2.12.4 Corporate Strategies
 - 5.2.12.4.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.12.5 Analyst View
- 5.2.13 Ganfeng Lithium Group Co., Ltd.
 - 5.2.13.1 Company Overview
 - 5.2.13.1.1 Role of Ganfeng Lithium Group Co., Ltd. in the Solid-State Battery Market
 - 5.2.13.1.2 Product Portfolio
 - 5.2.13.2 Business Strategies
 - 5.2.13.2.1 Market Development
 - 5.2.13.3 Corporate Strategies
 - 5.2.13.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.13.4 R&D Analysis
 - 5.2.13.5 Analyst View
- 5.2.14 StoreDot
 - 5.2.14.1 Company Overview
 - 5.2.14.1.1 Role of StoreDot in the Solid-State Battery Market
 - 5.2.14.1.2 Product Portfolio
 - 5.2.14.2 Business Strategies
 - 5.2.14.2.1 Market Development
 - 5.2.14.3 Corporate Strategies
 - 5.2.14.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.14.4 Analyst View
- 5.2.15 Factorial Inc.

- 5.2.15.1 Company Overview
 - 5.2.15.1.1 Role of Factorial Inc. in the Solid-State Battery Market
 - 5.2.15.1.2 Product Portfolio
- 5.2.15.2 Business Strategies
 - 5.2.15.2.1 Product Development
- 5.2.15.3 Corporate Strategies
 - 5.2.15.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
- 5.2.15.4 Analyst View
- 5.2.16 theion GmbH
 - 5.2.16.1 Company Overview
 - 5.2.16.1.1 Role of theion GmbH in the Solid-State Battery Market
 - 5.2.16.1.2 Product Portfolio
 - 5.2.16.2 Analyst View
- 5.2.17 Sakuu Corporation
 - 5.2.17.1 Company Overview
 - 5.2.17.1.1 Role of Sakuu Corporation in the Solid-State Battery Market
 - 5.2.17.1.2 Product Portfolio
 - 5.2.17.2 Business Strategies
 - 5.2.17.2.1 Product Development
 - 5.2.17.3 Analyst View
- 5.2.18 Ion Storage Systems
 - 5.2.18.1 Company Overview
 - 5.2.18.1.1 Role of Ion Storage Systems in the Solid-State Battery Market
 - 5.2.18.1.2 Product Portfolio
 - 5.2.18.2 Corporate Strategies
 - 5.2.18.2.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.18.3 Analyst View
- 5.2.19 SK on Co., Ltd.
 - 5.2.19.1 Company Overview
 - 5.2.19.1.1 Role of SK on Co., Ltd. in the Solid-State Battery Market
 - 5.2.19.1.2 Product Portfolio
 - 5.2.19.2 Business Strategies
 - 5.2.19.2.1 Market Development
 - 5.2.19.3 Corporate Strategies
 - 5.2.19.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
 - 5.2.19.4 Analyst View
- 5.2.20 Natrion Inc.
 - 5.2.20.1 Company Overview
 - 5.2.20.1.1 Role of Natrion Inc. in the Solid-State Battery Market

- 5.2.20.1.2 Product Portfolio
- 5.2.20.2 Business Strategies
 - 5.2.20.2.1 Product Development
- 5.2.20.3 Corporate Strategies
 - 5.2.20.3.1 Partnerships, Collaborations, Agreements, Investments, and Contracts
- 5.2.20.4 Analyst View

6 RESEARCH METHODOLOGY

List Of Figures

LIST OF FIGURES

Figure 1: Global Solid-State Battery Market Snapshot, \$Million, 2022, 2023, and 2032

Figure 2: Global Solid-State Battery Market (by Application), \$Million, 2022 and 2032

Figure 3: Global Solid-State Battery Market (by Electrolyte Type), \$Million, 2022 and 2032

Figure 4: Global Solid-State Battery Market (by Battery Type), \$Million, 2022 and 2032

Figure 5: Global Solid-State Battery Market (by Capacity), \$Million, 2022 and 2032

Figure 6: Global Solid-State Battery Market (by Region), \$Million, 2022, 2032

Figure 7: Solid-State Battery Market Coverage

Figure 8: Supply Chain Analysis of Solid-State Battery Market

Figure 9: Comparative Analysis Between Lithium-Ion and Solid-State Batteries

Figure 10: Comparative Analysis in Terms of Power Density

Figure 11: Global Electric Vehicle Solid-State Battery Market, MWh, 2022 and 2032

Figure 12: Sodium-Ion Battery Market Snapshot, 2021-2031

Figure 13: Clean Energy Investment in the Net Zero Pathway, 2016-2020, 2030, and 2050

Figure 14: Increasing Electric Vehicle (EV) Adoption, 2020-2030

Figure 15: Analysis of Electric Vehicle Adoption, Million Units, 2020, 2025, and 2030

Figure 16: Global Smartphones, Personal Computers, and Television Sales, \$Billion, 2018 and 2021

Figure 17: Global IoT Installed Base of Connected Devices, \$Billion, 2015-2025

Figure 18: Average Annual Net Renewable Capacity Additions (GW), 2011-2022

Figure 19: Percentage of the U.S. Adults Regularly Wearing Smart Watches or Fitness Trackers

Figure 20: Product Benchmarking (by Electrolyte Type)

Figure 21: Patent Analysis (by Year), January 2019-August 2023

Figure 22: Patent Analysis (by Status), January 2019-August 2023

Figure 23: Patent Analysis (by Organization), January 2019-August 2021

Figure 24: North America Total Renewable Energy Capacity, 2018-2021 (MW)

Figure 25: U.S. Electric Car Sales, 2020-2023

Figure 26: Research Methodology

Figure 27: Top-Down and Bottom-Up Approach

Figure 28: Solid-State Battery Market Influencing Factors

Figure 29: Assumptions and Limitations

List Of Tables

LIST OF TABLES

- Table 1: Government Initiatives Related to Solid-State Battery Development
- Table 2: Automotive OEM Activities Related to Solid-State Battery Development
- Table 3: Announced Solid-State Battery Projects
- Table 4: Key Product Development, 2022-2023
- Table 5: Key Market Development, 2022-2023
- Table 6: Partnerships, Collaborations, Agreements, Investments, and Contracts, 2022-2023
- Table 7: Global Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 8: Global Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 9: Current Challenges of Polymer Electrolytes and Possible Solutions
- Table 10: Current Challenges of Sulfide Electrolytes and Possible Solutions
- Table 11: Current Challenges of Oxide Electrolytes and Possible Solutions
- Table 12: Global Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 13: Global Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 14: Global Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 15: Global Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 16: Global Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 17: Global Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 18: Solid-State Battery Market: Global Level- Average Pricing Analysis, (\$/KWh), 2022-2032
- Table 19: Solid-State Battery Average Pricing Analysis (by Region), (\$/KWh), 2022-2032
- Table 20: Global Solid-State Battery Market (by Region), \$Million, 2022-2032
- Table 21: Global Solid-State Battery Market (by Region), MWh, 2022-2032
- Table 22: North America Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 23: North America Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 24: North America Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 25: North America Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 26: North America Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 27: North America Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 28: North America Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 29: North America Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 30: U.S. Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 31: U.S. Solid-State Battery Market (by Application), MWh, 2022-2032

Table 32: U.S. Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 33: U.S. Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 34: U.S. Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 35: U.S. Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 36: U.S. Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 37: U.S. Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 38: Canada Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 39: Canada Solid-State Battery Market (by Application), MWh, 2022-2032

Table 40: Canada Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 41: Canada Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 42: Canada Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 43: Canada Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 44: Canada Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 45: Canada Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 46: Mexico Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 47: Mexico Solid-State Battery Market (by Application), MWh, 2022-2032

Table 48: Mexico Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 49: Mexico Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 50: Mexico Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 51: Mexico Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 52: Mexico Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 53: Mexico Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 54: Europe Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 55: Europe Solid-State Battery Market (by Application), MWh, 2022-2032

Table 56: Europe Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 57: Europe Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 58: Europe Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 59: Europe Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 60: Europe Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 61: Europe Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 62: Germany Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 63: Germany Solid-State Battery Market (by Application), MWh, 2022-2032

Table 64: Germany Solid-State Battery Market (by Electrolyte Type), \$Million,
2022-2032

Table 65: Germany Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 66: Germany Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

- Table 67: Germany Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 68: Germany Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 69: Germany Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 70: France Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 71: France Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 72: France Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 73: France Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 74: France Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 75: France Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 76: France Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 77: France Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 78: Italy Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 79: Italy Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 80: Italy Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 81: Italy Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 82: Italy Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 83: Italy Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 84: Italy Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 85: Italy Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 86: Spain Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 87: Spain Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 88: Spain Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 89: Spain Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 90: Spain Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 91: Spain Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 92: Spain Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 93: Spain Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 94: Rest-of-Europe Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 95: Rest-of-Europe Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 96: Rest-of-Europe Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 97: Rest-of-Europe Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 98: Rest-of-Europe Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 99: Rest-of-Europe Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 100: Rest-of-Europe Solid-State Battery Market (by Capacity), \$Million,

2022-2032

Table 101: Rest-of-Europe Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 102: U.K. Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 103: U.K. Solid-State Battery Market (by Application), MWh, 2022-2032

Table 104: U.K. Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 105: U.K. Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 106: U.K. Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 107: U.K. Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 108: U.K. Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 109: U.K. Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 110: China Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 111: China Solid-State Battery Market (by Application), MWh, 2022-2032

Table 112: China Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 113: China Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 114: China Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 115: China Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 116: China Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 117: China Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 118: Asia-Pacific and Japan Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 119: Asia-Pacific and Japan Solid-State Battery Market (by Application), MWh, 2022-2032

Table 120: Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 121: Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 122: Asia-Pacific and Japan Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 123: Asia-Pacific and Japan Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 124: Asia-Pacific and Japan Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 125: Asia-Pacific and Japan Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 126: Japan Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 127: Japan Solid-State Battery Market (by Application), MWh, 2022-2032

Table 128: Japan Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 129: Japan Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 130: Japan Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

- Table 131: Japan Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 132: Japan Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 133: Japan Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 134: South Korea Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 135: South Korea Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 136: South Korea Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 137: South Korea Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 138: South Korea Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 139: South Korea Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 140: South Korea Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 141: South Korea Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 142: India Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 143: India Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 144: India Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 145: India Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 146: India Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 147: India Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 148: India Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 149: India Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 150: Taiwan Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 151: Taiwan Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 152: Taiwan Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 153: Taiwan Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 154: Taiwan Solid-State Battery Market (by Battery Type), \$Million, 2022-2032
- Table 155: Taiwan Solid-State Battery Market (by Battery Type), MWh, 2022-2032
- Table 156: Taiwan Solid-State Battery Market (by Capacity), \$Million, 2022-2032
- Table 157: Taiwan Solid-State Battery Market (by Capacity), MWh, 2022-2032
- Table 158: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Application), \$Million, 2022-2032
- Table 159: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Application), MWh, 2022-2032
- Table 160: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032
- Table 161: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032
- Table 162: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Battery Type),

\$Million, 2022-2032

Table 163: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 164: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 165: Rest-of-Asia-Pacific and Japan Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 166: Rest-of-the-World Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 167: Rest-of-the-World Solid-State Battery Market (by Application), MWh, 2022-2032

Table 168: Rest-of-the-World Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 169: Rest-of-the-World Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 170: Rest-of-the-World Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 171: Rest-of-the-World Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 172: Rest-of-the-World Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 173: Rest-of-the-World Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 174: South America Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 175: South America Solid-State Battery Market (by Application), MWh, 2022-2032

Table 176: South America Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 177: South America Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 178: South America Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 179: South America Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 180: South America Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 181: South America Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 182: Middle East and Africa Solid-State Battery Market (by Application), \$Million, 2022-2032

Table 183: Middle East and Africa Solid-State Battery Market (by Application), MWh,

2022-2032

Table 184: Middle East and Africa Solid-State Battery Market (by Electrolyte Type), \$Million, 2022-2032

Table 185: Middle East and Africa Solid-State Battery Market (by Electrolyte Type), MWh, 2022-2032

Table 186: Middle East and Africa Solid-State Battery Market (by Battery Type), \$Million, 2022-2032

Table 187: Middle East and Africa Solid-State Battery Market (by Battery Type), MWh, 2022-2032

Table 188: Middle East and Africa Solid-State Battery Market (by Capacity), \$Million, 2022-2032

Table 189: Middle East and Africa Solid-State Battery Market (by Capacity), MWh, 2022-2032

Table 190: Product Matrix for Key Companies

Table 191: Market Share of Key Companies, 2022

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