

Global Automotive Lithium-ion Battery Cell Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Lithium-ion Battery Cell market size is expected to reach \$ 538469 million by 2032, rising at a market growth of 16.4% CAGR during the forecast period (2026-2032).

Lithium-ion battery cells for automobiles are the most basic energy storage units in automotive power battery systems. They are typically composed of positive electrode materials, negative electrode materials, electrolyte, separator, current collector, and casing or aluminum-plastic film. Charging and discharging are achieved through the insertion and extraction of lithium ions between the positive and negative electrodes. They are a core component of battery modules and battery packs, directly determining the energy density, power performance, cycle life, safety, fast charging capability, low-temperature performance, and cost of the automotive battery system. Based on material systems, automotive lithium-ion battery cells mainly include lithium iron phosphate cells, ternary lithium cells, lithium manganese oxide cells, and lithium titanate cells; based on structural form, they can be divided into prismatic cells, cylindrical cells, and pouch cells. These cells are widely used in pure electric vehicles, plug-in hybrid electric vehicles, range-extended electric vehicles, electric commercial vehicles, and some automotive low-voltage power systems, and are one of the most critical basic components in new energy vehicle power systems. Global shipments reached 1495.1 GWh in 2025, with approximately 1,187 GWh installed in vehicles.

The global automotive lithium-ion battery cell market is at a critical stage of expansion, technological iteration, and reshaping of the competitive landscape. With the continued growth in new energy vehicle sales and the accelerated electrification of vehicle platforms, the demand for power batteries is rapidly increasing. As a core component of the battery system value chain, the technology roadmap, manufacturing cost, product

consistency, and supply stability of battery cells are directly impacting the range, safety level, fast-charging capabilities, and cost competitiveness of vehicle manufacturers. In the coming years, the automotive lithium-ion battery cell market will remain one of the fastest-growing, most heavily invested, and most competitive segments in the global new energy vehicle industry chain.

From the demand side, pure electric vehicles remain the primary source of demand for automotive lithium-ion battery cells, while plug-in hybrid electric vehicles, range-extended electric vehicles, electric commercial vehicles, logistics vehicles, buses, and special-purpose vehicles are also continuously contributing to incremental growth. As vehicle models develop towards longer range, faster charging, platform-based systems, and higher safety, vehicle manufacturers are placing higher demands on cell energy density, cycle life, rate performance, low-temperature performance, thermal stability, and cost control. The partnership between battery cell manufacturers and OEMs has become closer, with joint development, long-term supply, designated supplier agreements, and localized production becoming key competitive strategies.

In terms of product structure, lithium iron phosphate (LFP) cells and ternary lithium-ion cells remain the two mainstream approaches in the automotive market. LFP cells, with their cost advantages, safety, and cycle life, continue to gain a larger share in mid-to-low-end passenger vehicles, commercial vehicles, and high-value-for-money models. Ternary lithium-ion cells, relying on their higher energy density, maintain an important position in markets with high range, high-end models, and those requiring lightweight construction. In terms of structural form, prismatic, cylindrical, and pouch cells coexist, each with its own advantages in manufacturing efficiency, space utilization, thermal management, safety design, and customer adaptability. The development of large cylindrical, blade, short-blade, high-voltage fast-charging, semi-solid-state, and solid-state cells will continue to drive technological upgrades in the industry.

In terms of the industry chain, automotive lithium-ion battery cells are highly dependent on key materials such as cathode materials, anode materials, electrolytes, separators, copper foil, aluminum foil, structural components, conductive agents, and binders. Fluctuations in the prices of resources such as lithium, nickel, cobalt, manganese, iron, phosphorus, and graphite directly affect cell costs and corporate profitability. Competition in the midstream cell manufacturing segment focuses on large-scale production capacity, yield control, process stability, automation levels, energy consumption control, and product consistency; the downstream segment connects battery modules, battery packs, BMS, thermal management systems, and vehicle manufacturers. With the improvement of battery recycling and material closed-loop

systems, cell manufacturers' layout in resource recycling and low-carbon manufacturing will also become a new competitive advantage.

From a regional perspective, China possesses a complete industry chain advantage in automotive lithium-ion battery cell manufacturing, material supply, equipment support, and new energy vehicle applications, making it the world's most important production and consumption market. South Korean and Japanese companies remain highly competitive in high-end customer support, quality management, and international supply. Europe and North America are accelerating the construction of domestic cell production capacity to reduce supply chain dependence and support the development of their local new energy vehicle industries. With the rise of the new energy vehicle industry, India, Southeast Asia, Latin America, and the Middle East will become emerging regions for battery cell companies to expand their global production capacity and customer base.

Looking ahead, the global automotive lithium-ion battery cell market will continue to be driven by the increasing penetration rate of new energy vehicles, the construction of fast-charging systems, vehicle platform upgrades, advancements in materials technology, and policy support. However, uncertainties will also arise from factors such as temporary overcapacity, intensified price competition, technology shifts, fluctuations in raw material supply, stricter safety regulations, and changes in international trade policies. Battery cell companies with strong technological iteration capabilities, large-scale manufacturing capabilities, cost control capabilities, customer certification capabilities, and global supply chain layouts will be in a more advantageous position in future competition.

This report studies the global Automotive Lithium-ion Battery Cell production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Lithium-ion Battery Cell and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Lithium-ion Battery Cell that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Lithium-ion Battery Cell total production and demand, 2021-2032, (GWh)

Global Automotive Lithium-ion Battery Cell Supply, Demand and Key Producers, 2026-2032

Global Automotive Lithium-ion Battery Cell total production value, 2021-2032, (USD Million)

Global Automotive Lithium-ion Battery Cell production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (GWh), (based on production site)

Global Automotive Lithium-ion Battery Cell consumption by region & country, CAGR, 2021-2032 & (GWh)

U.S. VS China: Automotive Lithium-ion Battery Cell domestic production, consumption, key domestic manufacturers and share

Global Automotive Lithium-ion Battery Cell production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (GWh)

Global Automotive Lithium-ion Battery Cell production by Type, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

Global Automotive Lithium-ion Battery Cell production by Application, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

This report profiles key players in the global Automotive Lithium-ion Battery Cell market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include CATL, BYD, LG Energy Solution, Panasonic, Samsung SDI, SK On, Guoxuan High-tech, CALB Group, EVE Energy, Sunwoda, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Lithium-ion Battery Cell market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (GWh) and average price (US\$/KWh) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Lithium-ion Battery Cell Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Lithium-ion Battery Cell Market, Segmentation by Type:

LFP Battery

NCx Batteries

Others

Global Automotive Lithium-ion Battery Cell Market, Segmentation by Form:

Cylindrical Battery

Primitive Battery

Pouch Battery

Global Automotive Lithium-ion Battery Cell Market, Segmentation by Charge Rate:

2C Fast Charging Battery

4C Fast Charging Battery

5C+ Ultra-fast Charging Battery

Global Automotive Lithium-ion Battery Cell Market, Segmentation by Application:

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Companies Profiled:

CATL

BYD

LG Energy Solution

Panasonic

Samsung SDI

SK On

Guoxuan High-tech

CALB Group

EVE Energy

Sunwoda

Farasis Energy

SVOLT Energy Technology

REPT BATTERO Energy

Tianjin EV Energies

Do-Fluoride New Materials

Inpai Battery

Cornex New Energy

Key Questions Answered:

1. How big is the global Automotive Lithium-ion Battery Cell market?
2. What is the demand of the global Automotive Lithium-ion Battery Cell market?
3. What is the year over year growth of the global Automotive Lithium-ion Battery Cell market?
4. What is the production and production value of the global Automotive Lithium-ion Battery Cell market?
5. Who are the key producers in the global Automotive Lithium-ion Battery Cell market?
6. What are the growth factors driving the market demand?

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