

Global Cell to Chassis Technology Market 2026 by Company, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G7C10930B05FEN.html>

Date: January 2026

Pages: 82

Price: US\$ 3,480.00 (Single User License)

ID: G7C10930B05FEN

Abstracts

According to our (Global Info Research) latest study, the global Cell to Chassis Technology market size was valued at US\$ 217 million in 2025 and is forecast to a readjusted size of US\$ 1012 million by 2032 with a CAGR of 21.3% during review period.

'Cell to Chassis' (CTC) refers to integrating individual battery cells into a modular system, which is then connected to the vehicle chassis. Modular systems typically include additional components such as cooling systems, control electronics, and safety features. In this design, the battery cells are connected to the modular system and then mounted to the chassis. This approach is typically used in hybrid vehicles, where the battery system is less critical to vehicle performance and can be optimized for cost and reliability. The gross margin of CTC (Chemical Tolerant Charging) technology is significantly affected by technological maturity and mass production scale. Leading companies, due to high technological barriers and economies of scale, can achieve gross margins of 20%-25%; smaller manufacturers, limited by process control and cost management capabilities, typically have gross margins of 10%-15%; some cross-industry companies, due to insufficient technological reserves, may have gross margins below the industry average.

Market drivers mainly include:

Forced policy promotion and 'dual carbon' targets. Global carbon neutrality policies are accelerating the penetration rate of new energy vehicles. China's new energy vehicle sales reached 12.866 million units in 2024, driving a surge in demand for CTC technology. Simultaneously, the EU's Battery Regulation requires a 70% battery

recycling rate by 2030, forcing companies to transition to green practices. CTC technology, due to its reduced material usage and simplified recycling process, has become a preferred choice.

Technological Iteration and Cost Optimization Needs: Traditional liquid lithium batteries have reached near-limit energy density (approximately 300Wh/kg), making it difficult to meet the demand for '1000km range + 10-minute fast charging.' CTC (Chemical Thermal Charge) technology, by improving space utilization (e.g., a 14.5% increase in the Leapmotor C01) and reducing structural components (lowering costs by 10%-15%), has become a key path to breaking through this bottleneck. Leading companies are further compressing costs and improving gross margins through integrated 'cell-chassis-autonomous driving' designs.

Application Scenarios Expansion and Supply Chain Collaboration: CTC technology not only serves new energy vehicles but also extends to low-altitude economies (such as electric aircraft) and energy storage systems. For example, CATL and NIO are collaborating to develop semi-solid-state CTC batteries supporting ultra-fast charging; Haibo Sicheng has built the world's first in-situ solid-state CTC energy storage power station in Longquan, Zhejiang, verifying its advantages in long-life (over 8000 cycles) and high-safety (zero thermal runaway) scenarios. The upstream and downstream of the industry chain accelerate the implementation of technology and market penetration through joint research and development (such as automakers and battery manufacturers sharing chassis data) and standardization (such as the CTC interface specification).

The Cell to Chassis Technology market report provides a detailed analysis of global market size, regional and country-level market size, segmentation market growth, market share, competitive Landscape, sales analysis, impact of domestic and global market players, value chain optimization, trade regulations, recent developments, opportunities analysis, strategic market growth analysis, product launches, area marketplace expanding, and technological innovations.

Market segmentation

Cell to Chassis Technology market is split by Type and by Application. For the period 2026-2032, the growth among segments provide accurate calculations and forecasts for revenue by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type,

Battery Pack Chassis Integration

Battery Cell Chassis Integration

Market segment by Technology

All-Solid-State CTC

Semi-Solid-State CTC

Market segment by Functional Category

Power CTC

Energy Storage CTC

Market segment by Application

Passenger Car

Commercial Car

Market segment by players, this report covers

Tesla

LG

CNP Technology

BYD

CATL

Volvo

Market segment by regions, regional analysis covers

North America

Europe

Asia-Pacific (China, Japan, South Korea, Rest of Asia)

South America

Middle East & Africa

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