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Global Cylindrical Power Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cylindrical Power Battery market size is expected to reach $ 50667 million by 2032, rising at a market growth of 16.2% CAGR during the forecast period (2026-2032).

Cylindrical Power Battery refers to a rechargeable traction battery built around cylindrical lithium-ion cells and engineered to provide propulsion energy, peak power, fast charging capability and cycle durability for electric vehicles. The cells generally use a metal can, wound electrode structure, pressure-relief assembly and standardized or vehicle-specific diameter and height combinations. The product scope is classified into 18-series, 21-series, 46-series large cylindrical batteries and other cylindrical power batteries, covering established formats such as 1865 and 2170 as well as emerging 46-mm platforms with different cell heights. Cathode chemistries mainly include NCM, NCA and LFP, while cell designs vary by energy density, power capability, charging rate, thermal characteristics and operating life. Cylindrical cells are integrated through cell-to-module, module-to-pack or more highly integrated structural pack architectures and are used in passenger vehicles, commercial vehicles, electric two-wheelers, light electric vehicles and selected off-road applications. Market volume is measured by battery energy shipped in GWh. Market value is assessed on a battery-pack-equivalent basis, reflecting the combined value of cells, interconnection systems, mechanical structures, battery management systems, thermal management and pack integration.

Key Findings

Global cylindrical power battery shipments reached approximately 164.5 GWh in 2025

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2026 shipments are forecast to reach approximately 208.9 GWh

Cylindrical batteries represented approximately 11.0 percent of global power battery shipments in 2025

The battery pack equivalent price averaged approximately USD 99 per kWh in 2025

The 46 series is the fastest expanding cylindrical product platform

Market Trends

The cylindrical power battery market is moving from mature 1865 and 2170 formats toward larger-diameter 46-series cells designed to increase energy per cell, reduce the number of cells and electrical connections required in a vehicle pack, and support higher charging and discharge rates. The 46-series platform is not developing as a single fixed specification: manufacturers and automakers are adopting a common diameter with different heights, including 4680, 4695, 46100 and 46120 configurations, allowing battery systems to be tailored to vehicle packaging and performance requirements. Samsung SDI began producing 46-series cylindrical batteries in 2025, Panasonic Energy has prepared mass production of 4680 automotive cells, and LG Energy Solution is expanding its 46-series supply platform. Product development is also shifting toward full-tab or distributed current-collection structures, higher-silicon anodes, improved electrolyte formulations and more efficient cooling arrangements. At pack level, cylindrical batteries are increasingly incorporated into module-reduced and structural battery systems. BMW’s 46-mm Gen6 platform combines cylindrical cells with cell-to-pack design and reports a substantial improvement in volumetric energy density compared with its previous prismatic-cell system.

Market Dynamics

Drivers

The principal growth driver is the continued expansion of electric vehicle production, particularly vehicle platforms that prioritize high energy density, rapid charging, repeatable automated manufacturing and flexible battery-pack geometry. Cylindrical

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cells benefit from mature high-speed winding, standardized metal-can manufacturing and highly automated sorting and assembly processes. Their relatively small individual cell size also enables pack designers to distribute cells across different vehicle footprints and isolate localized failures, while larger 46-series products improve system efficiency by reducing cell count and connection complexity. Automaker adoption is becoming a direct demand catalyst. CATL has agreed to supply 46-mm cylindrical cells for BMW's Neue Klasse platform from dedicated production capacity in China and Europe, while Panasonic Energy opened its Kansas automotive battery facility in 2025 with planned annual capacity of approximately 32 GWh for 2170 cells. The availability of established 21-series products and emerging 46-series systems therefore allows cylindrical battery suppliers to serve both existing vehicle programs and new platform generations. Growth is further supported by localization policies, expanding fast-charging networks and automakers' efforts to diversify battery suppliers across regions.

Restraints

The market is restrained by intensive price competition, substantial capital requirements and the manufacturing difficulty of scaling new large cylindrical formats. A 46-series cell contains more active material and stores more energy than a conventional cylindrical cell, increasing the financial impact of defects and making electrode alignment, winding tension, electrolyte filling, formation and thermal control more demanding. Production lines must achieve high yields before large-cell cost advantages can be fully realized. Cylindrical battery packs also require numerous welds, busbar connections, cell holders, fuses and cooling interfaces, particularly when conventional 18-series or 21-series cells are used. These components can reduce pack-level energy density and offset part of the cell's manufacturing advantage. The industry also faces persistent raw-material exposure, including lithium, nickel, cobalt, graphite, electrolyte and copper or aluminum current collectors. At the same time, excess battery manufacturing capacity and aggressive procurement by vehicle manufacturers place downward pressure on prices. The battery-pack-equivalent average used in this study declines from approximately USD 99 per kWh in 2025 to USD 96 per kWh in 2026, requiring manufacturers to offset pricing pressure through yield improvement, material optimization, automation and higher production utilization.

Opportunities

The largest near-term opportunity lies in commercializing 46-series batteries across premium and mass-market electric passenger vehicles. Larger cells can reduce

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component count and enable highly integrated pack designs, while multiple cell heights permit suppliers to adapt a common manufacturing and design platform to vehicles with different range, floor height and power requirements. LG Energy Solution has announced supply arrangements for 46-series cells and is expanding related production capability, while Samsung SDI has developed a portfolio covering several 46-mm dimensions. Additional opportunities are emerging in LFP cylindrical batteries for commercial vehicles, light electric vehicles and applications where safety, cycle life and total ownership cost are more important than maximum gravimetric energy density. Further value can be created through advanced thermal management, structural battery packs, high-voltage charging platforms and closer integration between cells, battery-management software and vehicle control systems. Regional localization offers another opportunity as customers seek shorter supply chains and regulatory compliance. Suppliers able to transfer consistent cell design and manufacturing quality across Asia, North America and Europe can gain access to long-duration vehicle programs while reducing transport, tariff and inventory exposure.

Challenges

A central technical challenge is controlling thermal propagation in packs containing hundreds or thousands of cells. Cylindrical geometry provides a defined pressure-relief direction and relatively uniform cell structure, but high cell counts increase the number of potential electrical and mechanical interfaces. Manufacturers and pack integrators must maintain consistency in capacity, internal resistance, self-discharge, welding quality and cooling contact while preventing a single-cell event from spreading to neighboring cells. The transition to large cylindrical formats raises additional challenges because cell-level energy increases faster than the number of cells decreases, making venting, propagation barriers and pack-level fault management more important. The industry also lacks a fully unified 46-series height standard, which may lead to customer-specific equipment, tooling and pack designs. Competitive pressure from prismatic LFP and long-format blade batteries remains significant because those systems have already achieved high pack integration and low cost in many vehicle segments. Regulatory requirements are also becoming more demanding. The European Union’s battery framework introduces requirements covering carbon footprint, recycled content, due diligence, lifecycle information and battery passports, increasing the importance of traceability and verifiable manufacturing data.

Industry Chain Analysis

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The upstream chain comprises lithium, nickel, cobalt, manganese, iron phosphate, graphite, silicon-based anode materials, conductive additives, binders, electrolyte salts, solvents, separators, copper foil, aluminum foil, nickel-plated steel cans, caps, safety vents and sealing components. These materials are processed into cathode and anode powders, coated electrodes, separators, electrolytes and precision structural parts. Material quality directly affects energy density, fast-charging capability, internal resistance, cycle life and thermal stability. Cylindrical products place particular requirements on steel-can dimensional accuracy, cap sealing, pressure-relief consistency and electrode-winding precision. Battery manufacturing remains geographically concentrated: China produced more than 80% of global battery cells in 2025 and held still higher shares in cathode and anode active materials, while companies headquartered in China, Korea and Japan supplied nearly all cells used globally. This concentration provides scale and cost advantages but also creates exposure to trade policy, transportation and regional supply-chain requirements.

The midstream covers slurry preparation, electrode coating, calendaring, slitting, winding, cell insertion, welding, electrolyte filling, sealing, formation, aging, grading and pack integration. Value creation depends on manufacturing yield, cell consistency, production speed and the ability to translate cell-level performance into a safe and efficient pack. For large cylindrical cells, production equipment, process control and thermal-management engineering are increasingly important sources of differentiation. Downstream customers include passenger-vehicle manufacturers, commercial-vehicle producers, light electric vehicle manufacturers and specialist mobility platforms. Suppliers may sell cells, modules or complete battery systems, with greater value captured when BMS, cooling, pack structures and vehicle integration are included. Recycling companies and material processors form the closing part of the chain by recovering nickel, cobalt, lithium, copper and other materials. As carbon-footprint reporting and battery-passport requirements develop, recycled material content and lifecycle data are becoming part of product qualification rather than only end-of-life considerations.

Segment Insights

By cell size, the 21-series remains the largest established segment of the automotive cylindrical battery market. It benefits from mature production equipment, high manufacturing yields, established vehicle platforms and extensive operating data. The 18-series continues to serve legacy vehicle programs, hybrid systems, light electric vehicles and applications where standardized small cells provide design flexibility,

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although its share of new high-capacity passenger-vehicle platforms is gradually declining. The 46-series is the fastest-growing segment and is expected to increase its share from a relatively limited base as new vehicle programs enter production. The market does not rely on one 46-series height: 4680, 4695, 46100, 46120 and customer-specific formats are being developed to balance energy capacity, cooling path, structural strength and vehicle floor dimensions. Panasonic Energy, LG Energy Solution, Samsung SDI and CATL have each advanced large cylindrical production or supply programs, providing the industrial base for broader adoption.

By chemistry, NCA and NCM batteries account for the majority of automotive cylindrical demand because of their established use in long-range passenger vehicles and their comparatively high energy density. LFP represents a smaller but strategically important segment, particularly in light electric vehicles, commercial applications and cost-sensitive vehicle platforms.

Downstream Market Opportunities

Passenger vehicles represent the largest downstream application for cylindrical power batteries, supported by established use in long-range battery electric vehicles and growing adoption of 46-series platforms. Customers in this segment prioritize energy density, rapid charging, predictable degradation, pack safety and stable large-volume supply. Large cylindrical batteries create opportunities for premium vehicles, performance-oriented models and high-voltage platforms, while mature 2170 products remain relevant for cost-optimized vehicle programs. Commercial vehicles offer a smaller but developing opportunity, particularly where high-power charging, modular maintenance and long operating life are required. LFP cylindrical products may gain relevance in light commercial vehicles, electric two-wheelers and other small mobility applications because they combine standardized manufacturing with strong cycle and safety characteristics. Non-road machinery, autonomous delivery equipment and specialist vehicles provide additional opportunities when battery packs must fit irregular spaces or tolerate vibration and demanding duty cycles. Downstream competition is increasingly decided during vehicle-platform development, making early engineering collaboration, validation support and long-term production commitments critical to supplier selection.

Regional Insights

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Asia-Pacific is the principal production base for cylindrical power batteries, supported by established battery manufacturers, integrated material supply chains and extensive cell-production equipment capabilities in China, Japan and South Korea. China is the largest global battery manufacturing center overall, accounting for more than 80% of battery-cell production in 2025, while Japan and South Korea retain strong positions in cylindrical cell technology, high-nickel chemistry, manufacturing quality and international automotive customer relationships. China is also developing additional large cylindrical capacity through suppliers targeting domestic and European vehicle platforms. The regional cost structure remains competitive because of high production scale, concentrated upstream materials and equipment supply, and established engineering labor. IEA analysis indicates that battery-cell prices in China are, on average, more than 30% below European levels and more than 20% below those in the United States, although the gap varies by chemistry and contract structure.

North America is a strategically important demand and production region because several major electric vehicle platforms use cylindrical cells. Panasonic Energy's Kansas factory began mass production of automotive 2170 cells in 2025 and targets annual capacity of approximately 32 GWh, strengthening localized supply. LG Energy Solution is developing a dedicated 46-series manufacturing base in Arizona, reflecting customer demand for larger cylindrical products and regional supply-chain localization. Europe is emerging as an important growth market through next-generation vehicle platforms. BMW's Neue Klasse adopts 46-mm cylindrical cells, while CATL plans dedicated production capacity in China and Europe for the program. European opportunities are accompanied by higher manufacturing costs and more extensive carbon, traceability and recycling requirements. Other regions remain relatively small but may develop through electric two-wheelers, imported passenger vehicles and localized pack assembly.

Competitive Landscape Analysis

The competitive landscape combines established cylindrical battery specialists with diversified power battery manufacturers entering the 46-series segment. Panasonic Energy has a long operating history in automotive cylindrical cells and is expanding both 2170 production in North America and 4680 manufacturing capability. LG Energy Solution competes through a broad cylindrical portfolio, international production network and planned expansion of 46-series supply. Samsung SDI is developing multiple 46-mm cell heights in addition to its existing 1865 and 2170 products, enabling it to address mobility applications with different energy and packaging requirements. CATL is

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entering the large cylindrical market through dedicated supply for BMW, using its material, cell-manufacturing and global localization capabilities. Chinese manufacturers including EVE Energy, Gotion High-tech, CALB, Sunwoda, REPT BATTERO and DFD are broadening the supplier base through large cylindrical, LFP and customer-specific battery programs. Competitive advantage increasingly depends on achieving high yields at scale, securing vehicle qualifications, controlling thermal propagation, delivering stable fast-charging performance and supporting regional production. Price remains important, but automakers also evaluate field reliability, long-term capacity guarantees, material traceability, pack engineering and the supplier's ability to maintain consistent performance across multiple factories. The transition from 2170 to 46-series technology therefore creates opportunities for new suppliers, but vehicle validation periods, capital intensity and customer-specific formats continue to protect established manufacturers.

Report Scope

This report studies the global Cylindrical Power Battery production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cylindrical Power Battery 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 Cylindrical Power Battery that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cylindrical Power Battery total production and demand, 2021-2032, (GWh)

Global Cylindrical Power Battery total production value, 2021-2032, (USD Million)

Global Cylindrical Power Battery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (GWh), (based on production site)

Global Cylindrical Power Battery consumption by region & country, CAGR, 2021-2032 & (GWh)

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U.S. VS China: Cylindrical Power Battery domestic production, consumption, key domestic manufacturers and share

Global Cylindrical Power Battery production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (GWh)

Global Cylindrical Power Battery production by Type, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

Global Cylindrical Power Battery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

This report profiles key players in the global Cylindrical Power Battery 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, LG Energy Solution, Panasonic, Guoxuan High-tech, Samsung SDI, CALB Group, EVE Energy, Sunwoda, REPT BATTERO Energy, Do-Fluoride New Materials, 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 Cylindrical Power Battery 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 Cylindrical Power Battery Market, By Region:

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United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Cylindrical Power Battery Market, Segmentation by Type:

LFP Battery

NCx Batteries

Others

Global Cylindrical Power Battery Market, Segmentation by Tab:

Single-tab

Multi-tab

Full-tab

Tabless

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Global Cylindrical Power Battery Market, Segmentation by Cell Size:

18-Series

21-Series

26-Series

32-Series

46-Series

Others

Global Cylindrical Power Battery Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

CATL

LG Energy Solution

Panasonic

Guoxuan High-tech

Samsung SDI

CALB Group

EVE Energy

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Sunwoda

REPT BATTERO Energy

Do-Fluoride New Materials

Key Questions Answered

1. How big is the global Cylindrical Power Battery market?
2. What is the demand of the global Cylindrical Power Battery market?
3. What is the year over year growth of the global Cylindrical Power Battery market?
4. What is the total value of the global Cylindrical Power Battery market?
5. Who are the Major Players in the global Cylindrical Power Battery market?
6. What are the growth factors driving the market demand?

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