

Global HEV Li-ion Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HEV Li-ion Battery market size is expected to reach \$ 93132 million by 2032, rising at a market growth of 15.6% CAGR during the forecast period (2026-2032).

Lithium-ion batteries for hybrid electric vehicles (HEVs) refer to lithium-ion batteries used in the powertrain systems of hybrid electric vehicles. Compared to batteries for pure electric vehicles, HEV lithium-ion batteries typically have smaller capacities, but their application in HEV powertrain systems requires higher standards for power output, fast charge/discharge capabilities, cycle life, safety, low-temperature performance, and high-frequency stability. Common technologies include ternary lithium batteries and lithium iron phosphate batteries, and product forms can include prismatic, cylindrical, and pouch cells. These batteries are crucial components for improving fuel economy, reducing emissions, enhancing driving performance, and driving the electrification of automobiles. Global shipments reached 273.6 GWh in 2025.

The global market for lithium-ion batteries for hybrid electric vehicles (HEVs) is experiencing steady growth and product structure upgrades. With increasingly stringent emission regulations, higher fuel economy requirements, and growing consumer demand for low-fuel-consumption, low-cost, and long-range vehicles, HEVs maintain a crucial position in the global electrification of the automotive industry. Compared to pure electric vehicles (EVs), HEVs offer advantages in terms of charging convenience, adaptability to various usage scenarios, and cost balance, driving the continued expansion of demand for dedicated HEV lithium-ion batteries and making it a segment with stable growth potential in the automotive power battery market.

From the demand side, plug-in hybrid electric vehicles (PHEVs) and range-extended electric vehicles (REEVs) constitute the main application scenarios for HEV lithium-ion

batteries. Among them, PHEVs and REEVs benefit from longer pure electric range, lower operating costs, and flexible charging methods, experiencing rapid growth in China, Europe, and some emerging markets. As OEMs accelerate the deployment of multiple technology routes, the HEV battery market will exhibit characteristics of diversified vehicle models, capacity differentiation, and upgraded power performance.

From a product structure perspective, HEV lithium-ion batteries place greater emphasis on high power output, rapid charge and discharge, cycle life, and safety and stability. Compared to pure electric vehicle batteries, hybrid batteries typically have smaller single-vehicle capacity but are used more frequently, requiring stricter standards for rate performance, energy recovery efficiency, temperature adaptability, and long-term reliability. Ternary lithium, lithium iron phosphate, lithium manganese oxide, and some high-power battery systems all have application potential in various vehicle models. In the future, as the pure electric range of plug-in hybrid and range-extended vehicles increases, hybrid battery capacity will continue to grow, while high-power, low-cost, long-life, and high-safety products will become key areas of competition for companies.

In terms of the industry chain, lithium-ion batteries for hybrid vehicles are highly related to cathode materials, anode materials, electrolytes, separators, copper foil, aluminum foil, battery casings, connectors, BMS, and thermal management systems. Midstream companies need to develop product capabilities suitable for different hybrid vehicle models in areas such as cell design, module integration, battery pack structure, thermal management control, and safety verification. Downstream OEMs are paying more attention to the synergistic effects of battery systems with engine, motor, electronic control, and vehicle energy management strategies. With the accelerated development of hybrid vehicle platforms, joint development, designated supplier relationships, and long-term supply relationships between battery companies and automakers will be further deepened.

Looking ahead, the global lithium-ion battery market for hybrid vehicles will continue to be driven by energy conservation and emission reduction policies, the electrification of gasoline vehicles, the increased sales of plug-in hybrid and range-extended models, and diversified consumer demands. However, the industry also faces challenges such as the replacement of pure electric vehicles, technological differentiation, cost pressures, changing vehicle cycles, and regional policy differences. Companies with capabilities in high-power cell development, system integration, customer certification, cost control, and collaborative vehicle development will be in a more advantageous position in future market competition.

This report studies the global HEV Li-ion Battery production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global HEV Li-ion Battery total production and demand, 2021-2032, (GWh)

Global HEV Li-ion Battery total production value, 2021-2032, (USD Million)

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

Global HEV Li-ion Battery consumption by region & country, CAGR, 2021-2032 & (GWh)

U.S. VS China: HEV Li-ion Battery domestic production, consumption, key domestic manufacturers and share

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

Global HEV Li-ion Battery production by Type, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

Global HEV Li-ion Battery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

This report profiles key players in the global HEV Li-ion 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, BYD, LG Energy Solution, Panasonic, Guoxuan High-tech, Samsung SDI, SK On, 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 HEV Li-ion 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 HEV Li-ion Battery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HEV Li-ion Battery Market, Segmentation by Type:

LFP Battery

NCx Batteries

Others

Global HEV Li-ion Battery Market, Segmentation by Form:

Cylindrical Battery

Primitive Battery

Pouch Battery

Global HEV Li-ion Battery Market, Segmentation by Charge Rate:

2C Fast Charging Battery

4C Fast Charging Battery

5C+ Ultra-fast Charging Battery

Global HEV Li-ion Battery Market, Segmentation by Application:

Passenger Car

Commercial Vehicles

Companies Profiled:

CATL

BYD

LG Energy Solution

Panasonic

Guoxuan High-tech

Samsung SDI

SK On

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 HEV Li-ion Battery market?
2. What is the demand of the global HEV Li-ion Battery market?
3. What is the year over year growth of the global HEV Li-ion Battery market?
4. What is the production and production value of the global HEV Li-ion Battery market?
5. Who are the key producers in the global HEV Li-ion Battery market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 HEV Li-ion Battery Introduction
- 1.2 World HEV Li-ion Battery Supply & Forecast
 - 1.2.1 World HEV Li-ion Battery Production Value (2021 & 2025 & 2032)
 - 1.2.2 World HEV Li-ion Battery Production (2021-2032)
 - 1.2.3 World HEV Li-ion Battery Pricing Trends (2021-2032)
- 1.3 World HEV Li-ion Battery Production by Region (Based on Production Site)
 - 1.3.1 World HEV Li-ion Battery Production Value by Region (2021-2032)
 - 1.3.2 World HEV Li-ion Battery Production by Region (2021-2032)
 - 1.3.3 World HEV Li-ion Battery Average Price by Region (2021-2032)
 - 1.3.4 North America HEV Li-ion Battery Production (2021-2032)
 - 1.3.5 Europe HEV Li-ion Battery Production (2021-2032)
 - 1.3.6 China HEV Li-ion Battery Production (2021-2032)
 - 1.3.7 Japan HEV Li-ion Battery Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 HEV Li-ion Battery Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 HEV Li-ion Battery Major Market Trends

2 DEMAND SUMMARY

- 2.1 World HEV Li-ion Battery Demand (2021-2032)
- 2.2 World HEV Li-ion Battery Consumption by Region
 - 2.2.1 World HEV Li-ion Battery Consumption by Region (2021-2026)
 - 2.2.2 World HEV Li-ion Battery Consumption Forecast by Region (2027-2032)
- 2.3 United States HEV Li-ion Battery Consumption (2021-2032)
- 2.4 China HEV Li-ion Battery Consumption (2021-2032)
- 2.5 Europe HEV Li-ion Battery Consumption (2021-2032)
- 2.6 Japan HEV Li-ion Battery Consumption (2021-2032)
- 2.7 South Korea HEV Li-ion Battery Consumption (2021-2032)
- 2.8 ASEAN HEV Li-ion Battery Consumption (2021-2032)
- 2.9 India HEV Li-ion Battery Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World HEV Li-ion Battery Production Value by Manufacturer (2021-2026)

- 3.2 World HEV Li-ion Battery Production by Manufacturer (2021-2026)
- 3.3 World HEV Li-ion Battery Average Price by Manufacturer (2021-2026)
- 3.4 HEV Li-ion Battery Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global HEV Li-ion Battery Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for HEV Li-ion Battery in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for HEV Li-ion Battery in 2025
- 3.6 HEV Li-ion Battery Market: Overall Company Footprint Analysis
 - 3.6.1 HEV Li-ion Battery Market: Region Footprint
 - 3.6.2 HEV Li-ion Battery Market: Company Product Type Footprint
 - 3.6.3 HEV Li-ion Battery Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: HEV Li-ion Battery Production Value Comparison
 - 4.1.1 United States VS China: HEV Li-ion Battery Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: HEV Li-ion Battery Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: HEV Li-ion Battery Production Comparison
 - 4.2.1 United States VS China: HEV Li-ion Battery Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: HEV Li-ion Battery Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: HEV Li-ion Battery Consumption Comparison
 - 4.3.1 United States VS China: HEV Li-ion Battery Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: HEV Li-ion Battery Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based HEV Li-ion Battery Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers HEV Li-ion Battery Production Value (2021-2026)

4.4.3 United States Based Manufacturers HEV Li-ion Battery Production (2021-2026)

4.5 China Based HEV Li-ion Battery Manufacturers and Market Share

4.5.1 China Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers HEV Li-ion Battery Production Value (2021-2026)

4.5.3 China Based Manufacturers HEV Li-ion Battery Production (2021-2026)

4.6 Rest of World Based HEV Li-ion Battery Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers HEV Li-ion Battery Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers HEV Li-ion Battery Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World HEV Li-ion Battery Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 LFP Battery

5.2.2 NCx Batteries

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World HEV Li-ion Battery Production by Type (2021-2032)

5.3.2 World HEV Li-ion Battery Production Value by Type (2021-2032)

5.3.3 World HEV Li-ion Battery Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY FORM

6.1 World HEV Li-ion Battery Market Size Overview by Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Form

6.2.1 Cylindrical Battery

6.2.2 Primitive Battery

6.2.3 Pouch Battery

6.3 Market Segment by Form

6.3.1 World HEV Li-ion Battery Production by Form (2021-2032)

6.3.2 World HEV Li-ion Battery Production Value by Form (2021-2032)

6.3.3 World HEV Li-ion Battery Average Price by Form (2021-2032)

7 MARKET ANALYSIS BY CHARGE RATE

7.1 World HEV Li-ion Battery Market Size Overview by Charge Rate: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Charge Rate

7.2.1 2C Fast Charging Battery

7.2.2 4C Fast Charging Battery

7.2.3 5C+ Ultra-fast Charging Battery

7.3 Market Segment by Charge Rate

7.3.1 World HEV Li-ion Battery Production by Charge Rate (2021-2032)

7.3.2 World HEV Li-ion Battery Production Value by Charge Rate (2021-2032)

7.3.3 World HEV Li-ion Battery Average Price by Charge Rate (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World HEV Li-ion Battery Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Passenger Car

8.2.2 Commercial Vehicles

8.3 Market Segment by Application

8.3.1 World HEV Li-ion Battery Production by Application (2021-2032)

8.3.2 World HEV Li-ion Battery Production Value by Application (2021-2032)

8.3.3 World HEV Li-ion Battery Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 CATL

9.1.1 CATL Details

9.1.2 CATL Major Business

9.1.3 CATL HEV Li-ion Battery Product and Services

9.1.4 CATL HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 CATL Recent Developments/Updates

9.1.6 CATL Competitive Strengths & Weaknesses

9.2 BYD

9.2.1 BYD Details

9.2.2 BYD Major Business

- 9.2.3 BYD HEV Li-ion Battery Product and Services
- 9.2.4 BYD HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 BYD Recent Developments/Updates
- 9.2.6 BYD Competitive Strengths & Weaknesses
- 9.3 LG Energy Solution
 - 9.3.1 LG Energy Solution Details
 - 9.3.2 LG Energy Solution Major Business
 - 9.3.3 LG Energy Solution HEV Li-ion Battery Product and Services
 - 9.3.4 LG Energy Solution HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 LG Energy Solution Recent Developments/Updates
 - 9.3.6 LG Energy Solution Competitive Strengths & Weaknesses
- 9.4 Panasonic
 - 9.4.1 Panasonic Details
 - 9.4.2 Panasonic Major Business
 - 9.4.3 Panasonic HEV Li-ion Battery Product and Services
 - 9.4.4 Panasonic HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Panasonic Recent Developments/Updates
 - 9.4.6 Panasonic Competitive Strengths & Weaknesses
- 9.5 Guoxuan High-tech
 - 9.5.1 Guoxuan High-tech Details
 - 9.5.2 Guoxuan High-tech Major Business
 - 9.5.3 Guoxuan High-tech HEV Li-ion Battery Product and Services
 - 9.5.4 Guoxuan High-tech HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Guoxuan High-tech Recent Developments/Updates
 - 9.5.6 Guoxuan High-tech Competitive Strengths & Weaknesses
- 9.6 Samsung SDI
 - 9.6.1 Samsung SDI Details
 - 9.6.2 Samsung SDI Major Business
 - 9.6.3 Samsung SDI HEV Li-ion Battery Product and Services
 - 9.6.4 Samsung SDI HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Samsung SDI Recent Developments/Updates
 - 9.6.6 Samsung SDI Competitive Strengths & Weaknesses
- 9.7 SK On
 - 9.7.1 SK On Details

- 9.7.2 SK On Major Business
- 9.7.3 SK On HEV Li-ion Battery Product and Services
- 9.7.4 SK On HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 SK On Recent Developments/Updates
- 9.7.6 SK On Competitive Strengths & Weaknesses
- 9.8 CALB Group
 - 9.8.1 CALB Group Details
 - 9.8.2 CALB Group Major Business
 - 9.8.3 CALB Group HEV Li-ion Battery Product and Services
 - 9.8.4 CALB Group HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 CALB Group Recent Developments/Updates
 - 9.8.6 CALB Group Competitive Strengths & Weaknesses
- 9.9 EVE Energy
 - 9.9.1 EVE Energy Details
 - 9.9.2 EVE Energy Major Business
 - 9.9.3 EVE Energy HEV Li-ion Battery Product and Services
 - 9.9.4 EVE Energy HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 EVE Energy Recent Developments/Updates
 - 9.9.6 EVE Energy Competitive Strengths & Weaknesses
- 9.10 Sunwoda
 - 9.10.1 Sunwoda Details
 - 9.10.2 Sunwoda Major Business
 - 9.10.3 Sunwoda HEV Li-ion Battery Product and Services
 - 9.10.4 Sunwoda HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Sunwoda Recent Developments/Updates
 - 9.10.6 Sunwoda Competitive Strengths & Weaknesses
- 9.11 Farasis Energy
 - 9.11.1 Farasis Energy Details
 - 9.11.2 Farasis Energy Major Business
 - 9.11.3 Farasis Energy HEV Li-ion Battery Product and Services
 - 9.11.4 Farasis Energy HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Farasis Energy Recent Developments/Updates
 - 9.11.6 Farasis Energy Competitive Strengths & Weaknesses
- 9.12 SVOLT Energy Technology

- 9.12.1 SVOLT Energy Technology Details
- 9.12.2 SVOLT Energy Technology Major Business
- 9.12.3 SVOLT Energy Technology HEV Li-ion Battery Product and Services
- 9.12.4 SVOLT Energy Technology HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 SVOLT Energy Technology Recent Developments/Updates
- 9.12.6 SVOLT Energy Technology Competitive Strengths & Weaknesses
- 9.13 REPT BATTERO Energy
 - 9.13.1 REPT BATTERO Energy Details
 - 9.13.2 REPT BATTERO Energy Major Business
 - 9.13.3 REPT BATTERO Energy HEV Li-ion Battery Product and Services
 - 9.13.4 REPT BATTERO Energy HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 REPT BATTERO Energy Recent Developments/Updates
 - 9.13.6 REPT BATTERO Energy Competitive Strengths & Weaknesses
- 9.14 Tianjin EV Energies
 - 9.14.1 Tianjin EV Energies Details
 - 9.14.2 Tianjin EV Energies Major Business
 - 9.14.3 Tianjin EV Energies HEV Li-ion Battery Product and Services
 - 9.14.4 Tianjin EV Energies HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Tianjin EV Energies Recent Developments/Updates
 - 9.14.6 Tianjin EV Energies Competitive Strengths & Weaknesses
- 9.15 Do-Fluoride New Materials
 - 9.15.1 Do-Fluoride New Materials Details
 - 9.15.2 Do-Fluoride New Materials Major Business
 - 9.15.3 Do-Fluoride New Materials HEV Li-ion Battery Product and Services
 - 9.15.4 Do-Fluoride New Materials HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Do-Fluoride New Materials Recent Developments/Updates
 - 9.15.6 Do-Fluoride New Materials Competitive Strengths & Weaknesses
- 9.16 Inpai Battery
 - 9.16.1 Inpai Battery Details
 - 9.16.2 Inpai Battery Major Business
 - 9.16.3 Inpai Battery HEV Li-ion Battery Product and Services
 - 9.16.4 Inpai Battery HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Inpai Battery Recent Developments/Updates
 - 9.16.6 Inpai Battery Competitive Strengths & Weaknesses

9.17 Cornex New Energy

9.17.1 Cornex New Energy Details

9.17.2 Cornex New Energy Major Business

9.17.3 Cornex New Energy HEV Li-ion Battery Product and Services

9.17.4 Cornex New Energy HEV Li-ion Battery Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Cornex New Energy Recent Developments/Updates

9.17.6 Cornex New Energy Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 HEV Li-ion Battery Industry Chain

10.2 HEV Li-ion Battery Upstream Analysis

10.2.1 HEV Li-ion Battery Core Raw Materials

10.2.2 Main Manufacturers of HEV Li-ion Battery Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 HEV Li-ion Battery Production Mode

10.6 HEV Li-ion Battery Procurement Model

10.7 HEV Li-ion Battery Industry Sales Model and Sales Channels

10.7.1 HEV Li-ion Battery Sales Model

10.7.2 HEV Li-ion Battery Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World HEV Li-ion Battery Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World HEV Li-ion Battery Production Value by Region (2021-2026) & (USD Million)

Table 3. World HEV Li-ion Battery Production Value by Region (2027-2032) & (USD Million)

Table 4. World HEV Li-ion Battery Production Value Market Share by Region (2021-2026)

Table 5. World HEV Li-ion Battery Production Value Market Share by Region (2027-2032)

Table 6. World HEV Li-ion Battery Production by Region (2021-2026) & (GWh)

Table 7. World HEV Li-ion Battery Production by Region (2027-2032) & (GWh)

Table 8. World HEV Li-ion Battery Production Market Share by Region (2021-2026)

Table 9. World HEV Li-ion Battery Production Market Share by Region (2027-2032)

Table 10. World HEV Li-ion Battery Average Price by Region (2021-2026) & (US\$/KWh)

Table 11. World HEV Li-ion Battery Average Price by Region (2027-2032) & (US\$/KWh)

Table 12. HEV Li-ion Battery Major Market Trends

Table 13. World HEV Li-ion Battery Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (GWh)

Table 14. World HEV Li-ion Battery Consumption by Region (2021-2026) & (GWh)

Table 15. World HEV Li-ion Battery Consumption Forecast by Region (2027-2032) & (GWh)

Table 16. World HEV Li-ion Battery Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key HEV Li-ion Battery Producers in 2025

Table 18. World HEV Li-ion Battery Production by Manufacturer (2021-2026) & (GWh)

Table 19. Production Market Share of Key HEV Li-ion Battery Producers in 2025

Table 20. World HEV Li-ion Battery Average Price by Manufacturer (2021-2026) & (US\$/KWh)

Table 21. Global HEV Li-ion Battery Company Evaluation Quadrant

Table 22. World HEV Li-ion Battery Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and HEV Li-ion Battery Production Site of Key Manufacturer

Table 24. HEV Li-ion Battery Market: Company Product Type Footprint

Table 25. HEV Li-ion Battery Market: Company Product Application Footprint

Table 26. HEV Li-ion Battery Competitive Factors
Table 27. HEV Li-ion Battery New Entrant and Capacity Expansion Plans
Table 28. HEV Li-ion Battery Mergers & Acquisitions Activity
Table 29. United States VS China HEV Li-ion Battery Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China HEV Li-ion Battery Production Comparison, (2021 & 2025 & 2032) & (GWh)
Table 31. United States VS China HEV Li-ion Battery Consumption Comparison, (2021 & 2025 & 2032) & (GWh)
Table 32. United States Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers HEV Li-ion Battery Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers HEV Li-ion Battery Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers HEV Li-ion Battery Production (2021-2026) & (GWh)
Table 36. United States Based Manufacturers HEV Li-ion Battery Production Market Share (2021-2026)
Table 37. China Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers HEV Li-ion Battery Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers HEV Li-ion Battery Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers HEV Li-ion Battery Production, (2021-2026) & (GWh)
Table 41. China Based Manufacturers HEV Li-ion Battery Production Market Share (2021-2026)
Table 42. Rest of World Based HEV Li-ion Battery Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers HEV Li-ion Battery Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers HEV Li-ion Battery Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers HEV Li-ion Battery Production, (2021-2026) & (GWh)
Table 46. Rest of World Based Manufacturers HEV Li-ion Battery Production Market Share (2021-2026)

Table 47. World HEV Li-ion Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World HEV Li-ion Battery Production by Type (2021-2026) & (GWh)

Table 49. World HEV Li-ion Battery Production by Type (2027-2032) & (GWh)

Table 50. World HEV Li-ion Battery Production Value by Type (2021-2026) & (USD Million)

Table 51. World HEV Li-ion Battery Production Value by Type (2027-2032) & (USD Million)

Table 52. World HEV Li-ion Battery Average Price by Type (2021-2026) & (US\$/KWh)

Table 53. World HEV Li-ion Battery Average Price by Type (2027-2032) & (US\$/KWh)

Table 54. World HEV Li-ion Battery Production Value by Form, (USD Million), 2021 & 2025 & 2032

Table 55. World HEV Li-ion Battery Production by Form (2021-2026) & (GWh)

Table 56. World HEV Li-ion Battery Production by Form (2027-2032) & (GWh)

Table 57. World HEV Li-ion Battery Production Value by Form (2021-2026) & (USD Million)

Table 58. World HEV Li-ion Battery Production Value by Form (2027-2032) & (USD Million)

Table 59. World HEV Li-ion Battery Average Price by Form (2021-2026) & (US\$/KWh)

Table 60. World HEV Li-ion Battery Average Price by Form (2027-2032) & (US\$/KWh)

Table 61. World HEV Li-ion Battery Production Value by Charge Rate, (USD Million), 2021 & 2025 & 2032

Table 62. World HEV Li-ion Battery Production by Charge Rate (2021-2026) & (GWh)

Table 63. World HEV Li-ion Battery Production by Charge Rate (2027-2032) & (GWh)

Table 64. World HEV Li-ion Battery Production Value by Charge Rate (2021-2026) & (USD Million)

Table 65. World HEV Li-ion Battery Production Value by Charge Rate (2027-2032) & (USD Million)

Table 66. World HEV Li-ion Battery Average Price by Charge Rate (2021-2026) & (US\$/KWh)

Table 67. World HEV Li-ion Battery Average Price by Charge Rate (2027-2032) & (US\$/KWh)

Table 68. World HEV Li-ion Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World HEV Li-ion Battery Production by Application (2021-2026) & (GWh)

Table 70. World HEV Li-ion Battery Production by Application (2027-2032) & (GWh)

Table 71. World HEV Li-ion Battery Production Value by Application (2021-2026) & (USD Million)

Table 72. World HEV Li-ion Battery Production Value by Application (2027-2032) &

(USD Million)

Table 73. World HEV Li-ion Battery Average Price by Application (2021-2026) & (US\$/KWh)

Table 74. World HEV Li-ion Battery Average Price by Application (2027-2032) & (US\$/KWh)

Table 75. CATL Basic Information, Manufacturing Base and Competitors

Table 76. CATL Major Business

Table 77. CATL HEV Li-ion Battery Product and Services

Table 78. CATL HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. CATL Recent Developments/Updates

Table 80. CATL Competitive Strengths & Weaknesses

Table 81. BYD Basic Information, Manufacturing Base and Competitors

Table 82. BYD Major Business

Table 83. BYD HEV Li-ion Battery Product and Services

Table 84. BYD HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. BYD Recent Developments/Updates

Table 86. BYD Competitive Strengths & Weaknesses

Table 87. LG Energy Solution Basic Information, Manufacturing Base and Competitors

Table 88. LG Energy Solution Major Business

Table 89. LG Energy Solution HEV Li-ion Battery Product and Services

Table 90. LG Energy Solution HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. LG Energy Solution Recent Developments/Updates

Table 92. LG Energy Solution Competitive Strengths & Weaknesses

Table 93. Panasonic Basic Information, Manufacturing Base and Competitors

Table 94. Panasonic Major Business

Table 95. Panasonic HEV Li-ion Battery Product and Services

Table 96. Panasonic HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Panasonic Recent Developments/Updates

Table 98. Panasonic Competitive Strengths & Weaknesses

Table 99. Guoxuan High-tech Basic Information, Manufacturing Base and Competitors

Table 100. Guoxuan High-tech Major Business

Table 101. Guoxuan High-tech HEV Li-ion Battery Product and Services

Table 102. Guoxuan High-tech HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Guoxuan High-tech Recent Developments/Updates

Table 104.	Guoxuan High-tech Competitive Strengths & Weaknesses
Table 105.	Samsung SDI Basic Information, Manufacturing Base and Competitors
Table 106.	Samsung SDI Major Business
Table 107.	Samsung SDI HEV Li-ion Battery Product and Services
Table 108.	Samsung SDI HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109.	Samsung SDI Recent Developments/Updates
Table 110.	Samsung SDI Competitive Strengths & Weaknesses
Table 111.	SK On Basic Information, Manufacturing Base and Competitors
Table 112.	SK On Major Business
Table 113.	SK On HEV Li-ion Battery Product and Services
Table 114.	SK On HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115.	SK On Recent Developments/Updates
Table 116.	SK On Competitive Strengths & Weaknesses
Table 117.	CALB Group Basic Information, Manufacturing Base and Competitors
Table 118.	CALB Group Major Business
Table 119.	CALB Group HEV Li-ion Battery Product and Services
Table 120.	CALB Group HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121.	CALB Group Recent Developments/Updates
Table 122.	CALB Group Competitive Strengths & Weaknesses
Table 123.	EVE Energy Basic Information, Manufacturing Base and Competitors
Table 124.	EVE Energy Major Business
Table 125.	EVE Energy HEV Li-ion Battery Product and Services
Table 126.	EVE Energy HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127.	EVE Energy Recent Developments/Updates
Table 128.	EVE Energy Competitive Strengths & Weaknesses
Table 129.	Sunwoda Basic Information, Manufacturing Base and Competitors
Table 130.	Sunwoda Major Business
Table 131.	Sunwoda HEV Li-ion Battery Product and Services
Table 132.	Sunwoda HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133.	Sunwoda Recent Developments/Updates
Table 134.	Sunwoda Competitive Strengths & Weaknesses
Table 135.	Farasis Energy Basic Information, Manufacturing Base and Competitors
Table 136.	Farasis Energy Major Business
Table 137.	Farasis Energy HEV Li-ion Battery Product and Services

Table 138. Farasis Energy HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Farasis Energy Recent Developments/Updates

Table 140. Farasis Energy Competitive Strengths & Weaknesses

Table 141. SVOLT Energy Technology Basic Information, Manufacturing Base and Competitors

Table 142. SVOLT Energy Technology Major Business

Table 143. SVOLT Energy Technology HEV Li-ion Battery Product and Services

Table 144. SVOLT Energy Technology HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. SVOLT Energy Technology Recent Developments/Updates

Table 146. SVOLT Energy Technology Competitive Strengths & Weaknesses

Table 147. REPT BATTERO Energy Basic Information, Manufacturing Base and Competitors

Table 148. REPT BATTERO Energy Major Business

Table 149. REPT BATTERO Energy HEV Li-ion Battery Product and Services

Table 150. REPT BATTERO Energy HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. REPT BATTERO Energy Recent Developments/Updates

Table 152. REPT BATTERO Energy Competitive Strengths & Weaknesses

Table 153. Tianjin EV Energies Basic Information, Manufacturing Base and Competitors

Table 154. Tianjin EV Energies Major Business

Table 155. Tianjin EV Energies HEV Li-ion Battery Product and Services

Table 156. Tianjin EV Energies HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Tianjin EV Energies Recent Developments/Updates

Table 158. Tianjin EV Energies Competitive Strengths & Weaknesses

Table 159. Do-Fluoride New Materials Basic Information, Manufacturing Base and Competitors

Table 160. Do-Fluoride New Materials Major Business

Table 161. Do-Fluoride New Materials HEV Li-ion Battery Product and Services

Table 162. Do-Fluoride New Materials HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Do-Fluoride New Materials Recent Developments/Updates

Table 164. Do-Fluoride New Materials Competitive Strengths & Weaknesses

Table 165. Inpai Battery Basic Information, Manufacturing Base and Competitors

Table 166. Inpai Battery Major Business

Table 167. Inpai Battery HEV Li-ion Battery Product and Services

Table 168. Inpai Battery HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Inpai Battery Recent Developments/Updates

Table 170. Inpai Battery Competitive Strengths & Weaknesses

Table 171. Cornex New Energy Basic Information, Manufacturing Base and Competitors

Table 172. Cornex New Energy Major Business

Table 173. Cornex New Energy HEV Li-ion Battery Product and Services

Table 174. Cornex New Energy HEV Li-ion Battery Production (GWh), Price (US\$/KWh), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Cornex New Energy Recent Developments/Updates

Table 176. Cornex New Energy Competitive Strengths & Weaknesses

Table 177. Global Key Players of HEV Li-ion Battery Upstream (Raw Materials)

Table 178. Global HEV Li-ion Battery Typical Customers

Table 179. HEV Li-ion Battery Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. HEV Li-ion Battery Picture

Figure 2. World HEV Li-ion Battery Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World HEV Li-ion Battery Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World HEV Li-ion Battery Production (2021-2032) & (GWh)

Figure 5. World HEV Li-ion Battery Average Price (2021-2032) & (US\$/KWh)

Figure 6. World HEV Li-ion Battery Production Value Market Share by Region (2021-2032)

Figure 7. World HEV Li-ion Battery Production Market Share by Region (2021-2032)

Figure 8. North America HEV Li-ion Battery Production (2021-2032) & (GWh)

Figure 9. Europe HEV Li-ion Battery Production (2021-2032) & (GWh)

Figure 10. China HEV Li-ion Battery Production (2021-2032) & (GWh)

Figure 11. Japan HEV Li-ion Battery Production (2021-2032) & (GWh)

Figure 12. HEV Li-ion Battery Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 15. World HEV Li-ion Battery Consumption Market Share by Region (2021-2032)

Figure 16. United States HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 17. China HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 18. Europe HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 19. Japan HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 20. South Korea HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 21. ASEAN HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 22. India HEV Li-ion Battery Consumption (2021-2032) & (GWh)

Figure 23. Producer Shipments of HEV Li-ion Battery by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for HEV Li-ion Battery Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for HEV Li-ion Battery Markets in 2025

Figure 26. United States VS China: HEV Li-ion Battery Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: HEV Li-ion Battery Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: HEV Li-ion Battery Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers HEV Li-ion Battery Production Market Share 2025

Figure 30. China Based Manufacturers HEV Li-ion Battery Production Market Share 2025

Figure 31. Rest of World Based Manufacturers HEV Li-ion Battery Production Market Share 2025

Figure 32. World HEV Li-ion Battery Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World HEV Li-ion Battery Production Value Market Share by Type in 2025

Figure 34. LFP Battery

Figure 35. NCx Batteries

Figure 36. Others

Figure 37. World HEV Li-ion Battery Production Market Share by Type (2021-2032)

Figure 38. World HEV Li-ion Battery Production Value Market Share by Type (2021-2032)

Figure 39. World HEV Li-ion Battery Average Price by Type (2021-2032) & (US\$/KWh)

Figure 40. World HEV Li-ion Battery Production Value by Form, (USD Million), 2021 & 2025 & 2032

Figure 41. World HEV Li-ion Battery Production Value Market Share by Form in 2025

Figure 42. Cylindrical Battery

Figure 43. Primitive Battery

Figure 44. Pouch Battery

Figure 45. World HEV Li-ion Battery Production Market Share by Form (2021-2032)

Figure 46. World HEV Li-ion Battery Production Value Market Share by Form (2021-2032)

Figure 47. World HEV Li-ion Battery Average Price by Form (2021-2032) & (US\$/KWh)

Figure 48. World HEV Li-ion Battery Production Value by Charge Rate, (USD Million), 2021 & 2025 & 2032

Figure 49. World HEV Li-ion Battery Production Value Market Share by Charge Rate in 2025

Figure 50. 2C Fast Charging Battery

Figure 51. 4C Fast Charging Battery

Figure 52. 5C+ Ultra-fast Charging Battery

Figure 53. World HEV Li-ion Battery Production Market Share by Charge Rate (2021-2032)

Figure 54. World HEV Li-ion Battery Production Value Market Share by Charge Rate (2021-2032)

Figure 55. World HEV Li-ion Battery Average Price by Charge Rate (2021-2032) & (US\$/KWh)

Figure 56. World HEV Li-ion Battery Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World HEV Li-ion Battery Production Value Market Share by Application in 2025

Figure 58. Passenger Car

Figure 59. Commercial Vehicles

Figure 60. World HEV Li-ion Battery Production Market Share by Application (2021-2032)

Figure 61. World HEV Li-ion Battery Production Value Market Share by Application (2021-2032)

Figure 62. World HEV Li-ion Battery Average Price by Application (2021-2032) & (US\$/KWh)

Figure 63. HEV Li-ion Battery Industry Chain

Figure 64. HEV Li-ion Battery Procurement Model

Figure 65. HEV Li-ion Battery Sales Model

Figure 66. HEV Li-ion Battery Sales Channels, Direct Sales, and Distribution

Figure 67. Methodology

Figure 68. Research Process and Data Source

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