

Global Lithium-ion Battery Packaging Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Lithium-ion Battery Packaging Materials market size is expected to reach \$ 16594 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

Lithium-ion Battery Packaging Materials define the physical safety boundary, form-factor flexibility, and lightweight potential of pouch-format lithium-ion cells, with aluminum-laminated pouch film as the core product and tab-seal film, casing components, insulation films, lids, and localized sealing materials as adjacent categories. A typical pouch laminate consists of an outer nylon or PET protection layer, an aluminum foil barrier layer, and an inner CPP/MPP heat-seal layer bonded through adhesive systems. Its role is not conventional packaging; it isolates electrodes, electrolyte, and separators from moisture, oxygen, mechanical stress, and electrochemical corrosion. Compared with cylindrical and prismatic metal cans, pouch packaging offers lower weight, thinner profiles, higher design flexibility, and shorter heat-transfer paths, which explains its relevance across consumer electronics, drones, EV batteries, energy storage systems, and pilot-scale semi-solid or solid-state batteries.

The performance of Lithium-ion Battery Packaging Materials is primarily assessed through barrier properties, formability, heat-seal reliability, electrolyte resistance, mechanical durability, and long-term aging stability. Commercial aluminum-laminated films are commonly supplied in approximate thickness levels of 88µm, 113µm, and 152/153µm. The 88µm grade is mainly used in slim consumer cells; 113µm covers consumer and smaller power applications; 152/153µm is more typical for EV and ESS pouch cells. Key technical parameters include forming depth above 5mm, heat-sealing windows around 180°-190°C, peel strength at the N/15mm level, heat-seal strength above 20N/15mm, strong moisture barrier, hydrofluoric-acid resistance, and seal

integrity after high temperature, vibration, drop impact, and cycling-induced swelling. As pouch cells scale up, defects such as pinholes, wrinkles, delamination, edge-seal failure, and non-uniform stress become more material; therefore, production consistency and process tolerance often matter more than isolated lab data.

The technology roadmap for Lithium-ion Battery Packaging Materials is centered on dry lamination, thermal lamination, and hybrid dry-thermal processes. Dry-process pouch films are strong in appearance, cutting quality, insulation, and formability, making them well established in consumer applications. Thermal-process films emphasize inner-layer bonding and electrolyte resistance, which are more relevant in high-reliability applications. EV and ESS use cases require tighter control of interlayer adhesion, aluminum foil surface treatment, CPP/MPP modification, electrolyte-resistant adhesives, edge-sealing conditions, and batch stability. The upstream chain includes aluminum foil, nylon/PET films, CPP/PP films, adhesives, surface-treatment chemicals, and coating/lamination equipment. The midstream covers lamination, aging, slitting, inspection, and forming validation. Downstream demand comes from pouch-cell and hybrid-format battery manufacturers serving IT devices, mobility, and stationary storage. In China, domestic substitution has moved from consumer electronics toward EV and ESS applications, but automotive qualification cycles remain longer and more demanding than 3C validation.

The competitive landscape of Lithium-ion Battery Packaging Materials still reflects the first-mover strength of Japanese and Korean suppliers in high-end pouch film, represented by DNP, Resonac, and Youlchon Chemical, while China's supplier base includes Zijiang New Material, Daoming Optics, Crown Material, Suda Huicheng, FSPG Hi-tech, Andelie, Putilai-related platforms, Jiangsu Leeden, Hangzhou First, Wazam, and SEMCORP. DNP positions battery pouches as exterior materials for lithium-ion batteries, emphasizing moisture barrier, electrolyte seal durability, insulation, hydrofluoric-acid resistance, and formability. Resonac's SPALF is a resin-film and aluminum-foil laminated composite material for pouch-type lithium-ion batteries. Youlchon Chemical remains an important Korean pouch-chain supplier. Recent industry developments show two clear directions: overseas localization and demand reallocation. DNP's North Carolina plan for automotive battery pouch slitting and future manufacturing involves a US\$233 million investment, while Korean pouch-film suppliers have been adjusting customer exposure after North American EV contract changes and redirecting resources toward LGES and ESS demand. A parallel transaction in adjacent battery foil materials illustrates the same strategic logic: Wanshun New Material's Hong Kong subsidiary acquired 100% of Eurofoil Luxembourg for approximately \$12.3889 million, adding European foil and sheet capacity exposure and reinforcing the global

footprint of China-linked battery material supply.

The growth logic of Lithium-ion Battery Packaging Materials is shifting from simple pouch penetration toward a combination of high-reliability pouch cells, ESS pouch applications, semi-solid/solid-state packaging, and regionalized supply chains. Pouch cells are not the default format for every EV platform, but their advantages in energy density, lightweighting, customized geometry, and pack integration continue to support demand in selected vehicle platforms, low-altitude mobility, robotics, power tools, and premium consumer electronics. ESS applications require cost discipline, cycle durability, and safety redundancy, which drives demand for thicker, weather-resistant, and more stable sealing structures. Semi-solid and solid-state batteries raise the bar for pressure tolerance, interface stability, long-term sealing, and low moisture permeability. The key trends are clear: thinner yet higher-barrier materials, faster automotive validation by Chinese suppliers, dual-sourcing and localization by global battery customers, and the migration of pouch film from a peripheral consumable to a critical material affecting safety, energy density, and manufacturing yield. Battery aluminum foil, PVDF binders, and separator-coating materials overlap with this value chain, but under a strict definition they should be treated as battery base materials or electrode/separator materials rather than core pouch packaging materials.

This report studies the global Lithium-ion Battery Packaging Materials demand, key companies, and key regions.

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

Highlights and key features of the study

Global Lithium-ion Battery Packaging Materials total market, 2021-2032, (USD Million)

Global Lithium-ion Battery Packaging Materials total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Lithium-ion Battery Packaging Materials total market, key domestic companies, and share, (USD Million)

Global Lithium-ion Battery Packaging Materials revenue by player, revenue and market share 2021-2026, (USD Million)

Global Lithium-ion Battery Packaging Materials total market by Type, CAGR, 2021-2032, (USD Million)

Global Lithium-ion Battery Packaging Materials total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Lithium-ion Battery Packaging Materials market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Toppan, Dai Nippon Printing, Biaxis, Resonac, Youlchon Chemical, SELEN Science & Technology, Zijiang New Material, Daoming Optics, Crown Material, Suda Huicheng, 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 Lithium-ion Battery Packaging Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Lithium-ion Battery Packaging Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Lithium-ion Battery Packaging Materials Market, Segmentation by Type:

Film

Adhesive

Aluminum Foil

Others

Global Lithium-ion Battery Packaging Materials Market, Segmentation by Packaging:

Pouch

Cylindrical

Prismatic

Global Lithium-ion Battery Packaging Materials Market, Segmentation by Application:

Lithium-ion Battery for EVs

Lithium-ion Battery for 3C Products

Lithium-ion Battery for Energy Storage Systems

Companies Profiled:

Toppan

Dai Nippon Printing

Biaxis

Resonac

Youlchon Chemical

SELEN Science & Technology

Zijiang New Material

Daoming Optics

Crown Material

Suda Huicheng

FSPG Hi-tech

Guangdong Andelie New Material

PUTAILAI

Jiangsu Leeden

HANGZHOU FIRST

WAZAM

Jangsu Huagu

SEMCORP

Tonytech

BASF

Kureha

Arkema

Solvay

Zhejiang Fluorine Chemical

Sinochem Lantian

Shandong Huaxia Shenzhou New Materials

Shanghai 3F New Materials

Eternal Materials

Ding Sheng New Material

North China Aluminium

UACJ

Lotte

Yong Jie New Material

Nanshan

Xiashun

Dongwon Systems

Yunnan Aluminium

SAMA

Toyo

DONG-IL

Wanshun New Material

Alcha

Symetal

Key Questions Answered

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

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