

Global Sodium-ion Battery Formation Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Sodium-ion Battery Formation Equipment market size is expected to reach \$ 558 million by 2032, rising at a market growth of 31.5% CAGR during the forecast period (2026-2032).

Sodium-ion Battery Formation Equipment refers to specialized manufacturing equipment used to activate sodium-ion cells through controlled initial charging and discharging after cell assembly, electrolyte filling and wetting. The formation process establishes a stable electrochemical interface, activates the cell chemistry and records key parameters such as voltage, current, capacity and temperature, directly affecting cell consistency, yield and long-term performance. Commercial systems are typically supplied as standalone formation cabinets, integrated formation systems, temperature-controlled or pressure-assisted formation equipment, and highly automated mass-production platforms. Core technical parameters include rated current per channel, voltage and current accuracy, channel density, temperature and pressure control, bidirectional energy recovery, process monitoring and automation capability. The equipment can be configured for prismatic, cylindrical and pouch sodium-ion cells and scaled from laboratory and pilot production to GWh-scale manufacturing. This study focuses on formation equipment and the power electronics, control modules, fixtures, thermal-management units and software functions that are integral to the formation process, serving sodium-ion cells used in energy storage, passenger and commercial vehicles, two-wheelers, backup power and other emerging battery applications.

Key Findings

The overall industry gross margin remained at approximately

30%–40%. Prismatic cell formation equipment remained the largest product type.

Energy-regenerative and high-temperature pressure formation equipment occupied the higher-value segment.

Energy storage batteries remained the largest downstream application.

China remained the largest production and demand market globally.

Europe, South Korea, Japan, and the United States maintained relatively mature battery formation equipment capabilities.

Market Trends

The technical direction of sodium-ion battery formation equipment is shifting from conventional fixed-parameter charging and discharging toward regenerative, high-density and data-driven formation. New industrial platforms increasingly combine bidirectional power conversion, high-speed current control, cell-level sensing, impedance measurement and adaptive process software. GWh-scale systems introduced in 2026 already support current architectures from approximately 75 A to 600 A, integrated electrochemical impedance spectroscopy and energy feedback, demonstrating the direction of next-generation formation technology.

A second trend is the transition from standalone formation cabinets toward integrated cell-finishing systems. Large battery factories increasingly require formation equipment to interface directly with automated loading, aging, grading, OCV testing, logistics and manufacturing execution systems. At the same time, equipment architectures are becoming more flexible across battery chemistries so that validated platforms can be adapted between lithium-ion, sodium-ion and other emerging cell systems with changes in fixtures, recipes and control parameters rather than complete equipment redesign.

Market Dynamics

The market is entering an investment-driven expansion phase, but equipment revenue remains more volatile than downstream battery capacity announcements suggest. Formation systems are normally ordered before commercial production starts, while

delivery, installation, commissioning, customer acceptance and revenue recognition may span multiple quarters. As a result, equipment demand can rise sharply during concentrated factory construction cycles and then moderate once major lines enter operation.

The current industrialization cycle accelerated materially in 2026. CATL announced an RMB 5 billion expansion at its Fuding base that adds 40 GWh of annual sodium-ion capacity and stated that mass-production lines were commissioned and operational. The same year, a three-year 60 GWh sodium-ion energy-storage agreement signaled that downstream commercialization is moving beyond pilot-scale demand. These developments increase the probability of larger formation-equipment orders, but actual equipment revenue will continue to depend on project execution and capacity utilization.

Drivers

The primary driver is the industrialization of sodium-ion batteries in applications where resource availability, safety, low-temperature operation, high power capability and supply-chain diversification have strategic value. Expansion of stationary energy storage is particularly supportive because sodium-ion technology does not need to compete solely on gravimetric energy density and can instead emphasize cycle performance, temperature adaptability, system safety and material availability. Policy support for diversified new-energy storage technologies in China and manufacturing programs for sodium-ion battery processes and machines in the United States are also strengthening the equipment-development environment.

Another driver is the conversion of sodium-ion development from laboratory projects into GWh-scale manufacturing. As customers progress from cell validation to pilot lines and then mass production, formation requirements shift from small-channel laboratory cyclers toward automated, regenerative, high-throughput equipment with tighter process consistency. This creates disproportionately higher equipment value per project even when the number of individual projects remains limited.

Restraints

The major restraint is that sodium-ion manufacturing capacity remains far ahead of actual cell shipments. This creates uncertainty around utilization rates and delays the conversion of announced projects into equipment orders. Existing lithium-ion factories may also reuse or modify part of their formation infrastructure because many electrical,

automation and cell-handling technologies are transferable between chemistries, reducing the amount of completely new equipment required for some sodium-ion projects.

Sodium-ion cells also continue to face application-specific performance trade-offs, particularly lower energy density relative to leading lithium-ion chemistries. Consequently, commercialization is likely to remain concentrated initially in applications where cost structure, safety, power characteristics or low-temperature performance outweigh energy-density disadvantages, limiting the pace at which formation-equipment demand spreads across all battery manufacturing segments.

Opportunities

The strongest equipment opportunity lies in modular platforms that can move with customers from R&D to pilot production and then to mass manufacturing. Unified software, transferable formation recipes, modular channel expansion and replaceable fixtures can shorten customer qualification cycles and improve equipment utilization. Measurement-driven formation, integrated impedance analysis and adaptive charging control also create opportunities to reduce formation time, improve consistency and shift part of quality inspection into the formation process itself.

Geographic localization represents another opportunity. Europe is moving from technology development toward industrial production, while the United States continues to support scalable sodium-ion manufacturing processes and machines. A European sodium-ion project has outlined a 5 GWh manufacturing roadmap, with an initial 0.7 GWh stage, illustrating the potential for formation-equipment demand outside China as local supply chains develop.

Challenges

The principal technical challenge is maintaining high consistency across thousands of cells while formation recipes continue to evolve with cathode chemistry, anode materials, electrolyte systems and cell formats. Equipment suppliers must balance current accuracy, thermal control, pressure consistency, throughput and energy efficiency without compromising safety or traceability. Customer qualification can therefore be lengthy, particularly for mass-production lines where small process deviations can materially affect yield and lifetime performance.

The commercial challenge is project concentration. Sodium-ion manufacturing remains in an early industrialization stage, so a relatively small number of large cell projects can materially change annual equipment demand. Suppliers must therefore manage engineering resources and manufacturing capacity against uncertain project timing while avoiding excessive exposure to capacity plans that may be postponed, resized or converted to other battery chemistries.

Industry Chain Analysis

The upstream supply chain includes bidirectional power-conversion modules, semiconductors, precision current and voltage sensors, contactors, controllers, industrial computers, cooling and heating systems, pressure fixtures, electrical cabinets and automation components. These components determine current accuracy, response speed, energy recovery, thermal stability and equipment reliability. The midstream consists of formation-equipment OEMs and integrated battery-line suppliers that combine power electronics, mechanical systems, controls and software into standalone machines or automated formation lines.

Downstream customers are sodium-ion cell manufacturers serving energy storage, mobility, two-wheelers, starter batteries and backup-power markets. Because formation parameters are closely linked to cell chemistry and design, equipment suppliers frequently participate in process development, line commissioning and production ramp-up rather than simply delivering standardized hardware.

Value Chain Analysis

The highest-value portions of the formation-equipment value chain are concentrated in bidirectional power electronics, precision measurement and control, formation algorithms, thermal and pressure management, automation integration and process software. Basic cabinets, frames and general electrical components are comparatively standardized, while high-accuracy control and customer-specific process engineering create greater differentiation.

As sodium-ion factories scale, value creation is increasingly shifting from individual hardware units toward integrated productivity. Equipment suppliers capable of reducing formation time, recovering discharge energy, improving yield, supporting recipe transfer and connecting formation data with factory-level quality systems can capture greater

strategic value throughout the customer's production lifecycle.

Segment Insights

By cell form factor, the market is principally divided into prismatic, cylindrical and pouch formation equipment. By formation-process configuration, systems can be grouped into standard, temperature-controlled, pressure and high-temperature pressure formation. By energy architecture, regenerative and non-regenerative systems form a clear technical split. By integration level, the market ranges from standalone formation equipment to integrated formation systems and cell-finishing lines. Production-scale segmentation spans laboratory and R&D systems, pilot-scale equipment and mass-production platforms.

Mass-production and integrated formation systems carry the greatest project value because they require high channel density, automated handling, energy recovery, production software and line-level quality control. Regenerative architectures are increasingly favored in newly built mass-production lines, while pilot systems remain strategically important because sodium-ion chemistries and formation recipes are still undergoing rapid optimization.

Downstream Market Opportunities

Energy storage currently provides the strongest pathway for large-scale sodium-ion deployment because stationary applications place less emphasis on gravimetric energy density and can benefit from material availability, temperature adaptability and safety characteristics. Large commercial agreements and dedicated sodium-ion storage products announced in 2026 indicate that this segment is moving toward GWh-scale commercialization and is likely to generate the most visible near-term demand for new formation capacity.

Mobility remains a second important opportunity. Passenger vehicles, commercial vehicles, microcars, two-wheelers and starter-power applications offer different combinations of cost, power and temperature requirements. Commercial vehicles and cold-region applications may be particularly suitable where power capability and low-temperature performance are prioritized, while broader passenger-vehicle adoption will depend on continued improvement in energy density and cost competitiveness.

Regional Insights

China is the central market for sodium-ion battery formation equipment in both supply and project demand. It combines the largest concentration of battery manufacturing capacity with a mature domestic ecosystem for formation power supplies, automation, fixtures, thermal systems and complete battery lines. The rapid movement of Chinese sodium-ion projects toward GWh-scale production reinforces the region's lead in near-term equipment procurement.

Europe is progressing from pilot manufacturing toward localized industrial capacity, creating opportunities for high-precision and integrated formation systems. North America remains smaller in commercial deployment but is actively supporting domestic sodium-ion manufacturing processes and equipment development. Japan and South Korea have established expertise in secondary-battery formation and charge-discharge production equipment, giving regional suppliers a strong technical base for sodium-ion adaptation even though publicly disclosed sodium-ion mass-production projects remain fewer than in China.

Competitive Landscape Analysis

The competitive landscape is geographically uneven. China has the broadest supplier base and strongest integration between formation equipment, battery-line automation and downstream cell manufacturing, giving local manufacturers advantages in project response, customization and scale-up. Europe is more concentrated in specialized power electronics, precision formation and advanced automation. South Korea and Japan retain strong engineering capabilities in high-volume secondary-battery formation and turnkey production systems, while North America is stronger in high-precision testing, pilot-scale development and emerging smart-formation technologies.

Competition is increasingly shifting away from basic charge-discharge functionality toward total production economics. Key differentiators include throughput, channel density, current and voltage accuracy, energy-recovery efficiency, thermal and pressure control, recipe flexibility, automation integration, data traceability and global after-sales capability. Customer validation history and the ability to transfer processes from pilot lines to stable mass production remain important barriers to entry, particularly as sodium-ion manufacturing moves toward larger commercial factories.

Report Scope

This report studies the global Sodium-ion Battery Formation Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Sodium-ion Battery Formation Equipment total production and demand, 2021-2032, (Units)

Global Sodium-ion Battery Formation Equipment total production value, 2021-2032, (USD Million)

Global Sodium-ion Battery Formation Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Sodium-ion Battery Formation Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Sodium-ion Battery Formation Equipment domestic production, consumption, key domestic manufacturers and share

Global Sodium-ion Battery Formation Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Sodium-ion Battery Formation Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Sodium-ion Battery Formation Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Sodium-ion Battery Formation Equipment 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 Wuxi Lead Intelligent Equipment Co., Ltd., Shenzhen Sinexcel Electric Co., Ltd., HNAC Technology Co., Ltd., Dongguan Guangya Intelligent Technology Co., Ltd., REPOWER TECHNOLOGY CO., LTD., Xiamen TOB New Energy Technology Co., Ltd., Xiamen Lith Machine Limited, Freiberg Instruments GmbH, Maccor, Inc., SoftEnergy Controls Inc., 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 Sodium-ion Battery Formation Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 Sodium-ion Battery Formation Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Sodium-ion Battery Formation Equipment Market, Segmentation by Type:

Prismatic Cell Formation Equipment

Cylindrical Cell Formation Equipment

Pouch Cell Formation Equipment

Others

Global Sodium-ion Battery Formation Equipment Market, Segmentation by Energy Recovery Architecture:

Regenerative Formation Equipment

Non-Regenerative Formation Equipment

Global Sodium-ion Battery Formation Equipment Market, Segmentation by Rated Current Per Channel:

≤10 A

>10–50 A

>50–150 A

>150 A

Global Sodium-ion Battery Formation Equipment Market, Segmentation by Application:

Power Battery

Energy Storage Battery

Consumer Battery

Others

Companies Profiled:

Wuxi Lead Intelligent Equipment Co., Ltd.

Shenzhen Sinexcel Electric Co., Ltd.

HNAC Technology Co., Ltd.

Dongguan Guangya Intelligent Technology Co., Ltd.

REPOWER TECHNOLOGY CO., LTD.

Xiamen TOB New Energy Technology Co., Ltd.

Xiamen Lith Machine Limited

Freiberg Instruments GmbH

Maccor, Inc.

SoftEnergy Controls Inc.

Key Questions Answered

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

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