

Global Tabless Ternary (NCM/NCA) Lithium Cells Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tabless Ternary (NCM/NCA) Lithium Cells market size is expected to reach \$ 3184 million by 2032, rising at a market growth of 26.4% CAGR during the forecast period (2026-2032).

Tabless Ternary (NCM/NCA) Lithium Cells are lithium-ion cells that combine a tabless current-collection structure with ternary cathode systems such as NCM or NCA, designed to improve energy density, high-rate discharge capability, current distribution, and thermal stability under high-load operation. Compared with conventional ternary lithium cells using standard tab structures, their advantages lie in lower internal resistance, wider current conduction paths, stronger power output, faster heat spreading, and better suitability for compact high-power battery packs. In 2025, production was approximately 240 million units and the average price was USD 2.5 per unit. The industry's capacity utilization rate in 2025 was about 65% and the average gross margin was around 25%. Upstream, the key materials include ternary cathode materials, anode materials, and separators, with representative suppliers such as BTR, Shanshan, and Yunnan Energy New Material supporting the core material system for high-performance lithium-ion cells. The midstream segment focuses on tabless ternary cell structure design, NCM/NCA electrode formulation, continuous current-collection path optimization, winding process control, electrode edge welding, electrolyte injection, formation and grading, safety testing, consistency management, thermal performance verification, and automated mass production, which together determine energy density, power output, heat dissipation, cycle life, safety reliability, and cost competitiveness. Downstream, Tabless Ternary (NCM/NCA) Lithium Cells are mainly used in power tools, portable energy storage, and data center backup batteries.

Tabless Ternary Lithium Cells are positioned around a dual performance gain from

material chemistry and current-collection structure. Ternary lithium chemistry provides higher energy density, while the tabless design shortens current conduction paths, lowers internal resistance, improves charge-discharge efficiency, and supports larger discharge current. In power tools, this supports instant high-power output and better endurance under frequent load changes. In portable energy storage, it helps balance compact size, runtime, and output power. For data center backup batteries, stable pulse discharge and cell consistency matter more during emergency switching. With broader model supply across brands and capacities, competition will focus on material stability, tabless structural design, welding quality, thermal control, and application matching.

This report studies the global Tabless Ternary (NCM/NCA) Lithium Cells production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tabless Ternary (NCM/NCA) Lithium Cells 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 Tabless Ternary (NCM/NCA) Lithium Cells that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tabless Ternary (NCM/NCA) Lithium Cells total production and demand, 2021-2032, (K Units)

Global Tabless Ternary (NCM/NCA) Lithium Cells total production value, 2021-2032, (USD Million)

Global Tabless Ternary (NCM/NCA) Lithium Cells production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Tabless Ternary (NCM/NCA) Lithium Cells consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Tabless Ternary (NCM/NCA) Lithium Cells domestic production, consumption, key domestic manufacturers and share

Global Tabless Ternary (NCM/NCA) Lithium Cells production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Tabless Ternary (NCM/NCA) Lithium Cells production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Tabless Ternary (NCM/NCA) Lithium Cells production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Ternary (NCM/NCA) Lithium Cells 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 EVE Energy (China), Sunpower (China), Lishen (China), BAK Battery (China), Greatpower (China), Ampac (China), Guangdong Greenway Technology (China), Tenpower (China), Reliance (China), BTCAP (China), 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 Ternary (NCM/NCA) Lithium Cells market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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 Ternary (NCM/NCA) Lithium Cells Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tabless Ternary (NCM/NCA) Lithium Cells Market, Segmentation by Type:

21700 Battery Cells

18650 Battery Cells

Others

Global Tabless Ternary (NCM/NCA) Lithium Cells Market, Segmentation by Single-Cell Capacity:

4000mAh

5000mAh

Others

Global Tabless Ternary (NCM/NCA) Lithium Cells Market, Segmentation by Maximum Current:

30A?Current

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