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Global Water-Based Binders for ?Lithium-Ion Battery Anode Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Water-Based Binders for ?Lithium-Ion Battery Anode market size was valued at US$ 794 million in 2025 and is forecast to a readjusted size of US$ 1553 million by 2032 with a CAGR of 10.1% during review period.

In 2025, global Water-Based Binders for ?Lithium-Ion Battery Anode production reached approximately 111.2 K Tons, with an average global market price of around 6937 USD per Ton.

Water-Based Binders for Lithium-Ion Battery Anode are aqueous polymer binder materials used in lithium-ion battery negative electrode formulations to bond anode active materials, conductive agents, and copper foil current collectors. They improve slurry dispersion, coating quality, peel strength, electrode flexibility, structural integrity, swelling resistance, and long-term cycling performance. They are widely used in graphite anodes and increasingly applied in silicon-carbon, silicon oxide, and other high-capacity anode systems.

The core value of water-based binders for lithium-ion battery anodes lies in their ability to combine environmental compatibility, safer processing, and electrode structural stability. By using water as the main solvent or dispersion medium, these binders help reduce reliance on solvent-based systems while improving slurry dispersion, coating uniformity, electrode adhesion, flexibility, and mechanical integrity. For graphite, silicon-carbon, silicon oxide, and other anode materials, they help address practical manufacturing and performance pain points such as powder shedding, electrode cracking, poor peel strength, and structural degradation during cycling. In silicon-based

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anodes, where volume expansion remains one of the biggest barriers to mass adoption, PAA, modified acrylic, and composite aqueous binders provide stronger interfacial bonding and better stress-buffering capability, helping maintain the conductive network and electrode integrity.

From an industry perspective, demand is being driven by the battery sector?s shift toward higher energy density, faster charging, longer cycle life, and cleaner manufacturing processes. As silicon-carbon, silicon oxide, fast-charging graphite, large-format cylindrical cells, and high-solid-content coating processes continue to advance, water-based anode binders are becoming more than auxiliary materials; they are evolving into critical functional enablers for next-generation anode systems. Their growth potential is grounded not in material substitution alone, but in real performance requirements, sustainable production trends, customized formulation capability, and stable large-scale supply. This makes the segment a low-volume but high-value niche within the lithium battery materials chain, with increasing strategic relevance as anode technologies continue to upgrade.

The upstream raw materials for water-based binders used in lithium-ion battery anodes vary significantly depending on the technical pathway. For the mainstream SBR/CMC systems used in traditional graphite anodes, key upstream materials include styrene, butadiene, refined cellulose, chloroacetic acid, caustic soda, and emulsion polymerization additives. In contrast, the PAA/acrylic-based systems?which are seeing rapid growth due to the adoption of silicon-based anodes?rely primarily on acrylic acid, acrylates, initiators, and neutralizing agents. Major global suppliers include Shell, SABIC, LyondellBasell, BASF, Nippon Shokubai, LG Chem, Nouryon, CABB, Suzano, Bracell, Kureha, Solvay, Arkema, and Daikin; key Chinese suppliers include Sinopec, PetroChina, Satellite Chemical, Wanhua Chemical, Dongyue Group, and Juhua Group. Downstream applications primarily span power batteries, energy storage batteries, and consumer electronics batteries, with typical customers including Panasonic, LG, Samsung, CATL, BYD, CALB, and Gotion High-Tech.

Production capacities for individual lines vary widely due to the differing manufacturing processes for product categories such as SBR, CMC, and PAA, while the industry's gross profit margin typically falls within the 35%?45% range.

This report is a detailed and comprehensive analysis for global Water-Based Binders for ?Lithium-Ion Battery Anode market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand

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trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Water-Based Binders for ?Lithium-Ion Battery Anode market size and forecasts, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Water-Based Binders for ?Lithium-Ion Battery Anode market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Water-Based Binders for ?Lithium-Ion Battery Anode market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/Ton), 2021-2032

Global Water-Based Binders for ?Lithium-Ion Battery Anode market shares of main players, shipments in revenue ($ Million), sales quantity (Kilotons), and ASP (US$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Water-Based Binders for ?Lithium-Ion Battery Anode

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Water-Based Binders for ?Lithium-Ion Battery Anode market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ZEON, LG Chem, BASF, Arkema S.A., Ashland Inc., Nouryon, Nippon Paper Industries Co., Ltd.,

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Daicel, SUMITOMO SEIKA, Chongqing Lihong Fine Chemicals Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Water-Based Binders for ?Lithium-Ion Battery Anode market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

SRB

CMC

PAA

Others

Market segment by Anode Materials

Graphite Anode Type

Silicon-Carbon Anode Type

Market segment by Application

Power Battery

Energy Storage Battery

Consumer Battery

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Major players covered

ZEON

LG Chem

BASF

Arkema S.A.

Ashland Inc.

Nouryon

Nippon Paper Industries Co., Ltd.

Daicel

SUMITOMO SEIKA

Chongqing Lihong Fine Chemicals Co., Ltd.

Henan Jinbang Power Source Technology Co., Ltd.

Huitian New Material Co., Ltd.

Sichuan Indigo Materials Technologies Group Co.,Ltd.

Crystal Clear Elect

Blue Ocean and Black Stone Technology

Puyang Blue Star New Material Co., Ltd.

Guangzhou Songbai Chemical Co., Ltd.

Jinan Zhongbei Fine Chemical Co., Ltd.

Pustar

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Eternal Materials

Shenzhen Yanyi New Material

Guangzhou Lushan New Materials

Wanhua Chemical Group

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Water-Based Binders for ?Lithium-Ion Battery Anode product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Water-Based Binders for ?Lithium-Ion Battery Anode, with price, sales quantity, revenue, and global market share of Water-Based Binders for ?Lithium-Ion Battery Anode from 2021 to 2026.

Chapter 3, the Water-Based Binders for ?Lithium-Ion Battery Anode competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Water-Based Binders for ?Lithium-Ion Battery Anode breakdown data are shown at the regional level, to show the sales quantity, consumption

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value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Water-Based Binders for ?Lithium-Ion Battery Anode market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Water-Based Binders for ?Lithium-Ion Battery Anode.

Chapter 14 and 15, to describe Water-Based Binders for ?Lithium-Ion Battery Anode sales channel, distributors, customers, research findings and conclusion.

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+357 96 030922
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