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Global Water-Based Binders for ?Lithium-Ion Battery Anode Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Water-Based Binders for ?Lithium-Ion Battery Anode market size is expected to reach $ 1553 million by 2032, rising at a market growth of 10.1% CAGR during the forecast period (2026-2032).

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 anodes, where volume expansion remains one of the biggest barriers to mass adoption, PAA, modified acrylic, and composite aqueous binders provide stronger interfacial

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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 studies the global Water-Based Binders for ?Lithium-Ion Battery Anode production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Water-Based Binders for ?Lithium-Ion Battery Anode and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report

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explores demand trends and competition, as well as details the characteristics of Water-Based Binders for ?Lithium-Ion Battery Anode that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Water-Based Binders for ?Lithium-Ion Battery Anode total production and demand, 2021-2032, (Kilotons)
Global Water-Based Binders for ?Lithium-Ion Battery Anode total production value, 2021-2032, (USD Million)
Global Water-Based Binders for ?Lithium-Ion Battery Anode production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)
Global Water-Based Binders for ?Lithium-Ion Battery Anode consumption by region & country, CAGR, 2021-2032 & (Kilotons)
U.S. VS China: Water-Based Binders for ?Lithium-Ion Battery Anode domestic production, consumption, key domestic manufacturers and share
Global Water-Based Binders for ?Lithium-Ion Battery Anode production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)
Global Water-Based Binders for ?Lithium-Ion Battery Anode production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)
Global Water-Based Binders for ?Lithium-Ion Battery Anode production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Water-Based Binders for ?Lithium-Ion Battery Anode 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 ZEON, LG Chem, BASF, Arkema S.A., Ashland Inc., Nouryon, Nippon Paper Industries Co., Ltd., 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Water-Based Binders for ?Lithium-Ion Battery Anode market

Detailed Segmentation:

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) 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 Water-Based Binders for ?Lithium-Ion Battery Anode Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Water-Based Binders for ?Lithium-Ion Battery Anode Market, Segmentation by Type:

SRB

CMC

PAA

Others

Global Water-Based Binders for ?Lithium-Ion Battery Anode Market, Segmentation by

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Anode Materials:

Graphite Anode Type

Silicon-Carbon Anode Type

Global Water-Based Binders for ?Lithium-Ion Battery Anode Market, Segmentation by Application:

Power Battery

Energy Storage Battery

Consumer Battery

Companies Profiled:

ZEON

LG Chem

BASF

Arkema S.A.

Ashland Inc.

Nouryon

Nippon Paper Industries Co., Ltd.

Daicel

SUMITOMO SEIKA

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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

Eternal Materials

Shenzhen Yanyi New Material

Guangzhou Lushan New Materials

Wanhua Chemical Group

Key Questions Answered:
1. How big is the global Water-Based Binders for ?Lithium-Ion Battery Anode market?
2. What is the demand of the global Water-Based Binders for ?Lithium-Ion Battery Anode market?
3. What is the year over year growth of the global Water-Based Binders for ?Lithium-Ion Battery Anode market?
4. What is the production and production value of the global Water-Based Binders for ?Lithium-Ion Battery Anode market?
5. Who are the key producers in the global Water-Based Binders for ?Lithium-Ion Battery Anode market?
6. What are the growth factors driving the market demand?

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