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Global Lithium-ion Battery Cathode Material Sagger Market Growth 2026-2032

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Abstracts

The global Lithium-ion Battery Cathode Material Sagger market size is predicted to grow from US$ 247 million in 2025 to US$ 453 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

Lithium-ion Battery Cathode Material Sagger refers to a specialised refractory ceramic container used to hold, protect and convey cathode powders during high-temperature calcination and solid-state synthesis. Products are generally square or rectangular boxes designed for continuous roller hearth or pusher kilns, with common dimensions around 320–330 mm in length and width and approximately 60–160 mm in height. The principal material systems are Mullite/Mullite-Cordierite, Corundum/Corundum-Mullite, Quartz, Silicon Carbide and other composite ceramics containing alumina, magnesia, spinel or zirconia-based functional phases. The products are used in the production of LFP, LMFP, NCM/NCA, LMO, LCO and other cathode active materials, typically under firing temperatures of approximately 800°C–1,300°C and controlled air, oxygen or inert atmospheres. Key performance indicators include powder loading capacity, thermal-shock resistance, resistance to lithium-salt and transition-metal corrosion, dimensional accuracy, mechanical strength, contamination control, thermal conductivity and repeated-cycle life. This research focuses on ceramic saggers supplied for lithium-ion battery cathode material production and evaluates the market by ceramic material, cathode chemistry, product performance and regional supply structure.

Key Findings

Global Lithium-ion Battery Cathode Material Sagger output reached 49.47 million units in 2025

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The weighted average selling price reached US$5.1 per unit in 2025

Industry gross margins generally ranged from 25% to 35% in 2025

Mullite-based products remain the mainstream material system

China is the largest production and consumption region

Market Trends

The Lithium-ion Battery Cathode Material Sagger market is shifting from conventional refractory boxes toward engineered thermal-processing components tailored to specific cathode chemistries and kiln profiles. Mainstream mullite and mullite-cordierite products are being improved through optimised particle grading, composite layers, lightweight structures and surface modification, while corundum-mullite, magnesia-rich, spinel-containing and coated products are gaining importance in high-nickel and other strongly corrosive applications. Silicon Carbide Saggers represent a premium route because their high thermal conductivity and mechanical strength enable thinner walls, lower thermal mass and higher usable kiln capacity. Saint-Gobain states that its PowerCeram silicon-carbide saggers can increase cathode active material throughput by more than 10% per kiln and reduce energy lost in heating ceramic kiln furniture by more than 50% per kilogram of processed material. Purchasing decisions are therefore moving from unit price toward total cost per firing cycle, incorporating loading volume, service life, energy consumption, breakage, contamination risk and kiln downtime. Longer-life products may reduce annual replacement volume, but they increase the value share of customised formulations, coatings, lightweight structures and technical services.

Market Dynamics

Drivers

Demand is primarily driven by continued expansion in cathode active material production and the recurring replacement characteristics of ceramic saggers. China’s Ministry of Industry and Information Technology reported cathode material output of approximately 1.15 million tonnes during the first four months of 2025, an increase of more than 40% year on year. Each newly commissioned cathode plant requires an initial inventory of saggers, while existing production lines generate recurring demand as products experience thermal fatigue, lithium-salt corrosion, surface spalling, cracking and deformation. Large-scale LFP and LMFP production supports high-volume demand

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for cost-effective mullite-based saggers, while high-nickel NCM/NCA and high-voltage LCO create stronger demand for corrosion-resistant, low-contamination and higher-value ceramic systems. Increasing automation in roller hearth kilns also raises requirements for dimensional consistency, mechanical strength and stable interaction with conveying equipment.

Restraints

Market growth is restrained by longer average service life, continued cost pressure among cathode producers and the use of alternative calcination technologies in selected material routes. Improved ceramic formulations, protective inner layers, coatings and better kiln management allow each sagger to complete more firing cycles, reducing replacement demand per tonne of cathode material. Some LFP production lines also use rotary kilns or other continuous thermal-processing systems, decreasing reliance on conventional box-type saggers. Meanwhile, weak profitability and excess capacity in parts of the cathode material industry create pressure for annual price reductions. The industry's 25%–35% gross-margin range may narrow when alumina, silicon carbide, zirconia, natural gas or electricity costs rise faster than product prices. Qualification is also highly customer-specific because changes in cathode chemistry, lithium content, atmosphere, powder loading and temperature profile can materially alter product life, limiting rapid supplier substitution and increasing development expenditure.

Opportunities

The strongest opportunities are concentrated in high-nickel cathode materials, high-performance Silicon Carbide Saggers, coated and composite structures, emerging battery chemistries and overseas cathode-material localisation. High-nickel NCM and NCA expose saggers to stronger lithium and alkaline corrosion, supporting demand for corundum-mullite, magnesia, spinel and specialised protective-layer products. Silicon carbide can increase heat-transfer efficiency and kiln loading capacity, while lightweight and thin-wall structures reduce the non-productive thermal mass heated during each cycle. Morgan Advanced Materials reports that its developing Morganite LiB saggar can complete up to 60 cycles under representative NMC811 conditions, compared with around 30 cycles for conventional products. Additional opportunities are emerging in solid-state electrolyte materials, lithium-rich manganese cathodes, high-voltage spinels and sodium-ion cathodes, where chemical compatibility and contamination control are critical. Overseas projects also create demand for local warehousing, application testing and rapid technical support.

Challenges

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Major challenges include balancing corrosion resistance with thermal-shock performance, maintaining consistent quality across large batches and controlling the trade-off between longer life and manufacturing cost. Increasing alumina content or introducing dense protective phases may improve chemical stability but can raise thermal expansion, weight or brittleness. Silicon-carbide products provide strong thermal performance but require higher-cost raw materials and more demanding manufacturing processes. Large-format and thin-wall saggers require tighter dimensional tolerances because deformation or edge damage can disrupt automated roller-kiln operation. Customers also apply different definitions of failure, contamination and cycle life, making direct product comparison difficult. Regional supply capability remains important because unexpected breakage can interrupt continuous production, while overseas suppliers face transportation damage, longer replenishment cycles and customs costs. Manufacturers that expand capacity before completing customer qualification may face low utilisation, while smaller suppliers can struggle to finance formulation development, automated inspection and extended industrial trials.

Industry Chain Analysis

The upstream segment supplies mullite, cordierite, alumina, corundum, fused quartz, silicon carbide, magnesia, zirconia, spinel-forming raw materials, binders and coating materials, together with natural gas, electricity, moulds and forming equipment. Midstream manufacturing covers formulation design, raw-material treatment, mixing, ageing, pressing, extrusion or casting, drying, high-temperature firing, coating, machining, dimensional inspection and packaging. Tianjin Trend discloses semi-dry pressing, plastic rolling, high-vacuum extrusion and pressure casting capabilities and produces cordierite-mullite, corundum-mullite, fused-quartz and silicon-carbide refractory systems. Downstream customers are LFP, LMFP, NCM/NCA, LMO and LCO producers using roller hearth, pusher and other continuous kilns. Value creation is concentrated in material formulation, usable powder loading, dimensional consistency, cycle life, contamination prevention and the ability to develop products around customer-specific cathode chemistry and kiln profiles. Suppliers combining material development, pilot testing and rapid replacement service generally achieve stronger customer retention.

Segment Insights

By material, Mullite/Mullite-Cordierite is the mainstream segment because it offers a practical balance of thermal-shock resistance, structural stability, manufacturability and cost. Corundum/Corundum-Mullite products have higher alumina content and generally

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stronger resistance to chemical attack, making them more suitable for high-nickel NCM/NCA, LCO and other demanding cathode materials. Silicon Carbide Saggers form a premium segment characterised by high thermal conductivity, high mechanical strength and thin-wall potential, but their prices are materially higher than those of conventional oxide ceramics. Quartz products should be retained as a specialised category for selected powder chemistries and thermal conditions rather than treated as a mainstream route equal in scale to mullite-based saggers. The Others segment covers alumina, magnesia, zirconia-containing, spinel-containing, coated and other composite ceramic systems. The 2025 weighted average price of US$5.1 per unit represents the overall product mix and is not a representative quotation for any individual material or specification.

By application, LFP Battery represents the largest volume market and prioritises cost, thermal-shock resistance and stable repeated use. LMFP can be incorporated within the LFP segment until it develops a sufficiently independent commercial supply structure. NCM/NCA Battery generally represents a higher-value application because high-nickel cathode materials require stronger chemical resistance, surface stability and contamination control. LCO Battery places greater emphasis on purity and stable performance in high-voltage consumer-electronics applications, while LMO Battery requires a balance between cost and resistance to manganese-containing compounds. Emerging cathode materials that have not yet achieved independent commercial scale can be captured within Others to maintain a clear MECE classification.

Downstream Market Opportunities

The largest downstream opportunity remains large-scale LFP production, where multiple high-utilisation roller hearth kilns generate recurring demand for cost-efficient mullite-based products. High-nickel NCM/NCA and high-voltage LCO provide stronger growth opportunities for corrosion-resistant inner layers, corundum-mullite, magnesia-rich, spinel-containing and silicon-carbide products. Lithium-rich manganese cathodes, solid-state electrolyte powders and sodium-ion cathode materials currently represent smaller applications but require stronger chemical compatibility, impurity control and customised dimensions. Suppliers able to participate in kiln commissioning, powder-loading optimisation, failure analysis and lifecycle testing are more likely to develop long-term customer relationships than companies relying solely on standard products and low pricing. A product with higher loading capacity or substantially longer life can create measurable customer value even when its unit price is above the 2025 market average of US$5.1 per unit.

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Regional Insights

China is the dominant production and consumption region, accounting for approximately 85% of global cathode active material output in 2025. Its advantages include concentrated cathode-material clusters, short delivery distances, rapid product customisation and a broad supplier base covering conventional mullite products, high-alumina composites, coated saggers and other advanced formulations. Competition is intense, and average prices are generally lower than in overseas markets. Korea and Japan remain important in high-nickel cathode materials, advanced ceramics and integrated kiln-process engineering. Dongkuk R&S explicitly offers saggers for LCO, NCM and NCA cathode materials, while Noritake provides battery-material saggers together with firing furnaces and powder-handling systems. Europe has a smaller shipment base but a stronger premium-product orientation, represented by Saint-Gobain's silicon-carbide solutions and Morgan Advanced Materials' longer-life development. North America and Southeast Asia offer longer-term localisation opportunities, although many new projects continue to rely on imported saggers and overseas technical support during qualification.

Competitive Landscape Analysis

The verified core supplier group includes Hunan Jinkai New Material Technology, Saint-Gobain, Dongkuk R&S, Noritake, Tianjin Trend Thermal Materials, Hunan Dejingyuan Technology and Fujian Junjie New Material. Hunan Jinkai discloses annual mullite-sagger capacity of 6.6 million units and long-term relationships with 68 battery-material companies. Tianjin Trend operates two manufacturing bases and offers multiple single-layer and composite sagger systems for cathode powder calcination. Dongkuk R&S supplies products for LCO, NCM, NCA and other cathode materials, while Fujian Junjie identifies ceramic containers for cathode-material synthesis as a principal business. Morgan Advanced Materials should be regarded as an emerging long-life technology participant because its demonstration line remains substantially smaller than established commercial capacity. TYK Corporation and Yixing Qianjin Special Ceramic can be retained in the extended supplier pool based on relevant ceramic and sagger capabilities. Tokyo Morex is closely associated with TYK management but mainly focuses on foundry crucibles and should not be counted separately as a core battery-sagger manufacturer. Hebei Shanqi primarily presents itself as a research, sales and supply-chain provider cooperating with other manufacturers and is more appropriately classified as a product provider rather than a confirmed manufacturer. Xiamen Zhongke Jingyuan, Hebei Zhongci North New Materials and Yangquan Yinyu New Materials should remain in the watchlist until stronger official evidence of stable battery-sagger

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production and shipments is available.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Lithium-ion Battery Cathode Material Sagger Industry Forecast” looks at past sales and reviews total world Lithium-ion Battery Cathode Material Sagger sales in 2025, providing a comprehensive analysis by region and market sector of projected Lithium-ion Battery Cathode Material Sagger sales for 2026 through 2032. With Lithium-ion Battery Cathode Material Sagger sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Lithium-ion Battery Cathode Material Sagger industry.

This Insight Report provides a comprehensive analysis of the global Lithium-ion Battery Cathode Material Sagger landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Lithium-ion Battery Cathode Material Sagger portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Lithium-ion Battery Cathode Material Sagger market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Lithium-ion Battery Cathode Material Sagger and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Lithium-ion Battery Cathode Material Sagger.

This report presents a comprehensive overview, market shares, and growth opportunities of Lithium-ion Battery Cathode Material Sagger market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Mullite/Mullite-Cordierite

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Corundum/Corundum-Mullite

Quartz

Silicon Carbide

Others

Segmentation by Height:

Height ?100 mm

Height >100 mm

Segmentation by Application:

LFP Battery

NCM/NCA Battery

LMO Battery

LCO Battery

This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Hunan Jinkai New Material Technology

Xiamen Zhongke Jingyuan

Hebei Zhongci North New Materials

Saint-Gobain

TYK Corporation

Noritake

Dongkuk

Tianjin Trend Thermal Materials

Hunan Dejingyuan Technology

Yangquan Yinyu New Materials

Tokyo Morex

Yixing Qianjin Special Ceramic

Fujian Junjie New Material

Hebei Shanqi New Materials Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Lithium-ion Battery Cathode Material

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Sagger market?

What factors are driving Lithium-ion Battery Cathode Material Sagger market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Lithium-ion Battery Cathode Material Sagger market opportunities vary by end market size?

How does Lithium-ion Battery Cathode Material Sagger break out by Type, by Application?

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