

Global Prismatic Battery Cell Compression Pad Market Growth 2026-2032

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Abstracts

The global Prismatic Battery Cell Compression Pad market size is predicted to grow from US\$ 640 million in 2025 to US\$ 1075 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Prismatic battery cell compression pads are compressible functional components installed between adjacent prismatic cells or between a cell stack and its end restraint structure. They are designed to maintain controlled pressure during battery assembly and operation, compensate for cell dimensional tolerances, reversible breathing, long-term swelling, and dimensional changes caused by temperature variations, while reducing vibration, mechanical impact, and localized stress concentration. These products are primarily manufactured from microcellular polyurethane foam, silicone foam, silicone sponge, polyolefin foam, and fiber- or mineral-based composite materials. They may be supplied as single-layer die-cut pads, adhesive-backed compression pads, film-laminated compression pads, or multilayer composite pads integrating electrical insulation, flame retardancy, and thermal runaway propagation protection. Key performance parameters include compression force deflection, compression set, stress relaxation, rebound force, thickness tolerance, temperature resistance, dielectric performance, and flame-retardant rating. This study focuses on finished or application-ready pressure-management pads designed for direct installation in prismatic-cell modules and battery packs, primarily serving electric vehicle traction batteries, electrochemical energy storage systems, and specialty and industrial equipment battery systems. Predictable compression behavior and stable pressure retention throughout the product life cycle are fundamental design requirements for both conventional compression pads and thermal protection integrated composite pads.

Key Findings

The global average selling price of prismatic battery cell compression pads was approximately US\$0.45–0.60 per piece in 2025.

Microcellular polyurethane foam remained the largest primary material category.

Standard pressure management pads remained the largest functional product category.

Asia-Pacific maintained the leading position in both demand scale and manufacturing activity.

Market Trends

The market is shifting from general-purpose cushioning materials toward engineered pressure-management components with predictable compression curves, lower compression set and more stable rebound force over extended cycling and temperature exposure. Cell manufacturers and pack designers increasingly evaluate pads according to compression force deflection, stress relaxation and pressure uniformity rather than initial softness alone. Thinner materials with higher mechanical stability are also gaining importance as battery developers seek to increase volumetric energy density without sacrificing allowance for cell swelling. Official product development activity shows continued optimization for prismatic cells, higher pressure requirements and flatter compression behavior.

Functional integration represents the second major trend. Conventional pressure-management pads are increasingly being combined with electrical insulation, flame resistance and thermal propagation mitigation. These structures can provide controlled compression during normal battery operation and delay heat transfer to adjacent cells during abnormal thermal events. This transition is increasing the value contribution of multilayer composite products and narrowing the boundary between traditional compression pads and thermal runaway barriers.

Market Dynamics

Drivers

Expansion in electric vehicle and stationary energy storage battery deployment remains the primary demand driver. Global EV battery deployment reached approximately 1.2 TWh in 2025 and is expected to approach 3 TWh by 2030, while battery energy storage

represented more than 15% of total lithium-ion battery deployment in 2025. The continued use of large-format prismatic cells in electric vehicles and energy storage creates sustained demand for components that manage swelling, dimensional tolerance and stack pressure.

Higher cell energy density and longer warranty requirements are also strengthening technical demand. Uneven or excessive pressure can affect cell interfaces, electrical and thermal connections and long-term battery performance. As pack designs use larger cells and reduce inactive structural space, compression pads must deliver more consistent force within narrower operating windows, supporting replacement of commodity foams by qualified battery-grade materials.

Restraints

Cost reduction across the battery supply chain limits selling-price growth for conventional products. Battery pack prices in China remained materially below those in the United States and Europe in 2025, reinforcing pressure on component localization, material utilization and conversion costs. Standard foam pads therefore face continued price competition, particularly in high-volume energy storage and mass-market electric vehicle programs.

Pack architecture is another structural restraint. Cell-to-pack, cell-to-chassis, blade-type arrangements, structural adhesives and integrated restraint frames can reduce the number, area or thickness of independent compression pads per unit of battery capacity. These architectures do not eliminate pressure-management requirements, but they can transfer the function into thinner pads, end restraints, adhesive layers or multifunctional structural components.

Opportunities

The strongest product opportunity lies in pads integrating pressure management with thermal runaway propagation protection. These products address both normal cycling requirements and abnormal thermal events, allowing suppliers to increase content value per cell interface. Opportunities are also emerging in high-energy-density prismatic batteries, solid-state battery development and battery systems requiring higher sustained stack pressure. Official product portfolios already show material development directed toward prismatic and solid-state battery configurations.

Stationary energy storage offers an additional volume opportunity because large-format

LFP prismatic cells are widely used in containerized and cabinet-based systems. Commercial vehicles, mining equipment, port machinery, marine systems and other industrial batteries create smaller but technically demanding segments where long cycle life, vibration resistance, flame retardancy and field reliability support higher-specification products.

Challenges

The industry lacks a single globally standardized method for comparing finished-pad performance. Suppliers may report compression force deflection, pushback force, compression set, stress relaxation or dimensional recovery using different specimen sizes, temperatures and compression ratios. This complicates direct product comparison and requires extensive customer-specific testing.

Long qualification cycles, proprietary battery pack designs and limited disclosure of cell pressure windows create additional entry barriers. Suppliers must coordinate material formulation, foaming, lamination, adhesive selection and die-cutting tolerances while maintaining consistent performance across production batches. The overlap between compression pads, cushioning pads, dielectric foams and thermal runaway barriers also increases the risk of inconsistent market classification.

Industry Chain Analysis

The upstream industry includes polyurethane, silicone, polyolefin and specialty elastomer producers, together with suppliers of ceramic fibers, mica, aerogel, pressure-sensitive adhesives and PET or PI insulation films. Midstream activities include material formulation, foaming, curing, coating, lamination, surface treatment, precision slitting, die-cutting and quality inspection. Some suppliers manufacture proprietary foam or composite materials, while others purchase qualified sheet or roll materials and convert them into application-specific finished pads.

Downstream customers include battery cell manufacturers, module and pack manufacturers, automotive battery system suppliers, electric vehicle manufacturers and energy storage system integrators. Product development is normally conducted around a specified cell format, swelling curve, pressure window, module structure and assembly process. As a result, approved products are generally customized rather than fully standardized commodities.

Value Chain Analysis

Material formulation and performance control capture the highest technical value because long-term compression behavior, temperature stability and flame or thermal performance depend on proprietary chemistry and process consistency. Suppliers with validated pressure-management platforms and global automotive qualification capabilities typically have stronger pricing power than producers of general-purpose foam.

Precision converting creates value through thickness control, adhesive lamination, clean die-cutting, dimensional accuracy, contamination management and high-volume delivery. Regional converters remain important because battery programs require short logistics cycles, engineering changes and local production support. However, conversion businesses face greater price competition unless they control differentiated materials or participate in early-stage battery design.

Segment Insights

By primary material, microcellular polyurethane foam remained the largest category due to its balance of compression-set resistance, tunable force response, clean die-cutting and suitability for adhesive lamination. Silicone foam and silicone sponge held a strong position in applications requiring wider temperature tolerance and improved flame resistance. Polyolefin foam was concentrated in more price-sensitive applications, while fiber- and mineral-based composites were increasingly used in products combining pressure management with thermal protection.

By functional integration, standard pressure management pads continued to represent the largest volume segment. Flame-retardant pressure-management pads formed the intermediate performance tier, while thermal runaway protection integrated pads achieved the highest unit value and the fastest product-level expansion. By product construction, single-layer and adhesive-backed pads dominated mainstream installations, whereas multilayer composite pads were increasingly adopted in safety-intensive designs.

By installation position, cell-to-cell pads represented the largest volume because they are installed repeatedly across the cell stack. Cell-to-end pads were lower in unit volume but can require greater thickness, area or load-bearing capability. By application, passenger electric vehicles remained the largest market, while stationary energy storage showed the strongest expansion potential.

Downstream Market Opportunities

Passenger electric vehicles remain the principal commercial market because of their large battery deployment base, strict durability requirements and extensive use of prismatic-cell platforms in Asia and Europe. Opportunities are increasingly concentrated in higher-density packs where thinner pads must maintain controlled pressure over longer operating lives.

Stationary energy storage is developing into the most important incremental demand source. Larger prismatic cells, long cycle-life requirements and stronger attention to thermal propagation increase demand for pressure-management and multifunctional safety materials. Electric trucks and industrial equipment also offer attractive opportunities because their large battery systems experience demanding vibration, temperature and load conditions. Global electric truck adoption is expanding in China, Europe and North America, although the market remains smaller than passenger electric vehicles.

Regional Insights

Asia-Pacific leads global demand and supply. China is the central market because it represented more than 80% of global battery cell production in 2025, while Chinese producers supplied almost 75% of batteries deployed in electric cars worldwide. More than 13 million electric cars were sold in China in 2025, accounting for approximately six out of every ten global electric car sales. These conditions support the region's dominant demand for prismatic-cell pressure-management materials and rapid development of local foam, silicone and die-cutting supply chains.

North America and Europe are important high-value markets, particularly for qualified automotive materials, multilayer thermal protection products and localized battery manufacturing programs. Europe benefits from its established automotive materials base and increasing regional battery investment, while North American demand is supported by local battery plants and industrial conversion capacity. Japan maintains a strong position in advanced polyurethane, silicone and precision foam technologies. South Korea and Taiwan participate primarily through battery, adhesive, film and precision materials supply chains, while Southeast Asia is developing mainly as a manufacturing and conversion base.

Competitive Landscape Analysis

The competitive structure combines a concentrated group of international specialty-material companies with a fragmented network of regional converters and customized component manufacturers. This study identifies 12 core manufacturer groups with verified production or product evidence. North American and European suppliers are comparatively strong in proprietary polyurethane, silicone and thermal protection platforms, while Japanese suppliers have advantages in precision foam and advanced polymer processing. Chinese manufacturers compete through local responsiveness, cost control, rapid customization and proximity to major battery cell and pack production.

Competition is increasingly determined by long-term compression stability, predictable force response, thermal safety integration, automotive qualification and global-local manufacturing coordination rather than by foam price alone. High-end projects favor suppliers that can participate in early pack development and provide validated material data, whereas standard products face stronger price competition and a broader regional supplier base.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Prismatic Battery Cell Compression Pad 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 Prismatic Battery Cell Compression Pad portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Prismatic Battery Cell Compression Pad market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Prismatic Battery Cell Compression Pad 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 Prismatic Battery Cell Compression Pad.

This report presents a comprehensive overview, market shares, and growth opportunities of Prismatic Battery Cell Compression Pad market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

- Microcellular Polyurethane Foam
- Silicone Foam and Silicone Sponge
- Polyolefin Foam
- Mineral-Based Composite
- Others

Segmentation by Installation Position:

- Cell-to-Cell Compression Pads
- Cell-to-End Compression Pads
- Others

Segmentation by Compression Ratio:

- Up to 10%
- Above 10% to 20%

Above 20% to 35%

Above 35%

Segmentation by Application:

Electric Vehicle Traction Batteries

Electrochemical Energy Storage Systems

Specialty and Industrial Equipment Battery Systems

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

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

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.

Rogers Corporation

Saint-Gobain

Boyd Corporation

3M Company

Aspen Aerogels, Inc.

Alkegen

JBC Technologies, Inc.

Tenneco Inc.

Adhex

Zotefoams plc

Morgan Advanced Materials plc

Tecman Advanced Material Engineers Ltd.

Elmelin Ltd

INOAC Corporation

Shenzhen Futureway Technology Co., Ltd.

Cybrid Technologies Inc.

Dongguan TAIYALUCK Electronic Technology Co., Ltd.

Hubei Xiangyuan New Material Technology Co., Ltd.

LK Celltech Co., Ltd.

UNITECH Co., Ltd.

INNOX Advanced Materials Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Prismatic Battery Cell Compression Pad market?

What factors are driving Prismatic Battery Cell Compression Pad market growth, globally and by region?

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

How do Prismatic Battery Cell Compression Pad market opportunities vary by end market size?

How does Prismatic Battery Cell Compression Pad break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Prismatic Battery Cell Compression Pad Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Prismatic Battery Cell Compression Pad by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Prismatic Battery Cell Compression Pad by Country/Region, 2021, 2025 & 2032
- 2.2 Prismatic Battery Cell Compression Pad Segment by Type
 - 2.2.1 Microcellular Polyurethane Foam
 - 2.2.2 Silicone Foam and Silicone Sponge
 - 2.2.3 Polyolefin Foam
 - 2.2.4 Mineral-Based Composite
 - 2.2.5 Others
 - 2.2.6 Prismatic Battery Cell Compression Pad Sales by Type
 - 2.2.6.1 Global Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)
 - 2.2.6.2 Global Prismatic Battery Cell Compression Pad Revenue and Market Share by Type (2021-2026)
 - 2.2.6.3 Global Prismatic Battery Cell Compression Pad Sale Price by Type (2021-2026)
- 2.3 Prismatic Battery Cell Compression Pad Segment by Installation Position
 - 2.3.1 Cell-to-Cell Compression Pads
 - 2.3.2 Cell-to-End Compression Pads
 - 2.3.3 Others
 - 2.3.4 Prismatic Battery Cell Compression Pad Sales by Installation Position

2.3.4.1 Global Prismatic Battery Cell Compression Pad Sales Market Share by Installation Position (2021-2026)

2.3.4.2 Global Prismatic Battery Cell Compression Pad Revenue and Market Share by Installation Position (2021-2026)

2.3.4.3 Global Prismatic Battery Cell Compression Pad Sale Price by Installation Position (2021-2026)

2.4 Prismatic Battery Cell Compression Pad Segment by Compression Ratio

2.4.1 Up to 10%

2.4.2 Above 10% to 20%

2.4.3 Above 20% to 35%

2.4.4 Above 35%

2.4.5 Prismatic Battery Cell Compression Pad Sales by Compression Ratio

2.4.5.1 Global Prismatic Battery Cell Compression Pad Sales Market Share by Compression Ratio (2021-2026)

2.4.5.2 Global Prismatic Battery Cell Compression Pad Revenue and Market Share by Compression Ratio (2021-2026)

2.4.5.3 Global Prismatic Battery Cell Compression Pad Sale Price by Compression Ratio (2021-2026)

2.5 Prismatic Battery Cell Compression Pad Segment by Application

2.5.1 Electric Vehicle Traction Batteries

2.5.2 Electrochemical Energy Storage Systems

2.5.3 Specialty and Industrial Equipment Battery Systems

2.5.4 Others

2.5.5 Prismatic Battery Cell Compression Pad Sales by Application

2.5.5.1 Global Prismatic Battery Cell Compression Pad Sale Market Share by Application (2021-2026)

2.5.5.2 Global Prismatic Battery Cell Compression Pad Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Prismatic Battery Cell Compression Pad Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Prismatic Battery Cell Compression Pad Breakdown Data by Company

3.1.1 Global Prismatic Battery Cell Compression Pad Annual Sales by Company (2021-2026)

3.1.2 Global Prismatic Battery Cell Compression Pad Sales Market Share by Company (2021-2026)

3.2 Global Prismatic Battery Cell Compression Pad Annual Revenue by Company

(2021-2026)

3.2.1 Global Prismatic Battery Cell Compression Pad Revenue by Company

(2021-2026)

3.2.2 Global Prismatic Battery Cell Compression Pad Revenue Market Share by Company (2021-2026)

3.3 Global Prismatic Battery Cell Compression Pad Sale Price by Company

3.4 Key Manufacturers Prismatic Battery Cell Compression Pad Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Prismatic Battery Cell Compression Pad Product Location Distribution

3.4.2 Players Prismatic Battery Cell Compression Pad Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PRISMATIC BATTERY CELL COMPRESSION PAD BY GEOGRAPHIC REGION

4.1 World Historic Prismatic Battery Cell Compression Pad Market Size by Geographic Region (2021-2026)

4.1.1 Global Prismatic Battery Cell Compression Pad Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Prismatic Battery Cell Compression Pad Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Prismatic Battery Cell Compression Pad Market Size by Country/Region (2021-2026)

4.2.1 Global Prismatic Battery Cell Compression Pad Annual Sales by Country/Region (2021-2026)

4.2.2 Global Prismatic Battery Cell Compression Pad Annual Revenue by Country/Region (2021-2026)

4.3 Americas Prismatic Battery Cell Compression Pad Sales Growth

4.4 APAC Prismatic Battery Cell Compression Pad Sales Growth

4.5 Europe Prismatic Battery Cell Compression Pad Sales Growth

4.6 Middle East & Africa Prismatic Battery Cell Compression Pad Sales Growth

5 AMERICAS

5.1 Americas Prismatic Battery Cell Compression Pad Sales by Country

5.1.1 Americas Prismatic Battery Cell Compression Pad Sales by Country (2021-2026)

5.1.2 Americas Prismatic Battery Cell Compression Pad Revenue by Country
(2021-2026)

5.2 Americas Prismatic Battery Cell Compression Pad Sales by Type (2021-2026)

5.3 Americas Prismatic Battery Cell Compression Pad Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Prismatic Battery Cell Compression Pad Sales by Region

6.1.1 APAC Prismatic Battery Cell Compression Pad Sales by Region (2021-2026)

6.1.2 APAC Prismatic Battery Cell Compression Pad Revenue by Region (2021-2026)

6.2 APAC Prismatic Battery Cell Compression Pad Sales by Type (2021-2026)

6.3 APAC Prismatic Battery Cell Compression Pad Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Prismatic Battery Cell Compression Pad by Country

7.1.1 Europe Prismatic Battery Cell Compression Pad Sales by Country (2021-2026)

7.1.2 Europe Prismatic Battery Cell Compression Pad Revenue by Country
(2021-2026)

7.2 Europe Prismatic Battery Cell Compression Pad Sales by Type (2021-2026)

7.3 Europe Prismatic Battery Cell Compression Pad Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Prismatic Battery Cell Compression Pad by Country

8.1.1 Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Country (2021-2026)

8.1.2 Middle East & Africa Prismatic Battery Cell Compression Pad Revenue by Country (2021-2026)

8.2 Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Type (2021-2026)

8.3 Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Prismatic Battery Cell Compression Pad

10.3 Manufacturing Process Analysis of Prismatic Battery Cell Compression Pad

10.4 Industry Chain Structure of Prismatic Battery Cell Compression Pad

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Prismatic Battery Cell Compression Pad Distributors

11.3 Prismatic Battery Cell Compression Pad Customer

12 WORLD FORECAST REVIEW FOR PRISMATIC BATTERY CELL COMPRESSION PAD BY GEOGRAPHIC REGION

12.1 Global Prismatic Battery Cell Compression Pad Market Size Forecast by Region

12.1.1 Global Prismatic Battery Cell Compression Pad Forecast by Region (2027-2032)

12.1.2 Global Prismatic Battery Cell Compression Pad Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Prismatic Battery Cell Compression Pad Forecast by Type (2027-2032)

12.7 Global Prismatic Battery Cell Compression Pad Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Rogers Corporation

13.1.1 Rogers Corporation Company Information

13.1.2 Rogers Corporation Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.1.3 Rogers Corporation Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Rogers Corporation Main Business Overview

13.1.5 Rogers Corporation Latest Developments

13.2 Saint-Gobain

13.2.1 Saint-Gobain Company Information

13.2.2 Saint-Gobain Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.2.3 Saint-Gobain Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Saint-Gobain Main Business Overview

13.2.5 Saint-Gobain Latest Developments

13.3 Boyd Corporation

13.3.1 Boyd Corporation Company Information

13.3.2 Boyd Corporation Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.3.3 Boyd Corporation Prismatic Battery Cell Compression Pad Sales, Revenue,

Price and Gross Margin (2021-2026)

13.3.4 Boyd Corporation Main Business Overview

13.3.5 Boyd Corporation Latest Developments

13.4 3M Company

13.4.1 3M Company Company Information

13.4.2 3M Company Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.4.3 3M Company Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 3M Company Main Business Overview

13.4.5 3M Company Latest Developments

13.5 Aspen Aerogels, Inc.

13.5.1 Aspen Aerogels, Inc. Company Information

13.5.2 Aspen Aerogels, Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.5.3 Aspen Aerogels, Inc. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Aspen Aerogels, Inc. Main Business Overview

13.5.5 Aspen Aerogels, Inc. Latest Developments

13.6 Alkegen

13.6.1 Alkegen Company Information

13.6.2 Alkegen Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.6.3 Alkegen Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Alkegen Main Business Overview

13.6.5 Alkegen Latest Developments

13.7 JBC Technologies, Inc.

13.7.1 JBC Technologies, Inc. Company Information

13.7.2 JBC Technologies, Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.7.3 JBC Technologies, Inc. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 JBC Technologies, Inc. Main Business Overview

13.7.5 JBC Technologies, Inc. Latest Developments

13.8 Tenneco Inc.

13.8.1 Tenneco Inc. Company Information

13.8.2 Tenneco Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.8.3 Tenneco Inc. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Tenneco Inc. Main Business Overview

13.8.5 Tenneco Inc. Latest Developments

13.9 Adhex

13.9.1 Adhex Company Information

13.9.2 Adhex Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.9.3 Adhex Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Adhex Main Business Overview

13.9.5 Adhex Latest Developments

13.10 Zotefoams plc

13.10.1 Zotefoams plc Company Information

13.10.2 Zotefoams plc Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.10.3 Zotefoams plc Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Zotefoams plc Main Business Overview

13.10.5 Zotefoams plc Latest Developments

13.11 Morgan Advanced Materials plc

13.11.1 Morgan Advanced Materials plc Company Information

13.11.2 Morgan Advanced Materials plc Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.11.3 Morgan Advanced Materials plc Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Morgan Advanced Materials plc Main Business Overview

13.11.5 Morgan Advanced Materials plc Latest Developments

13.12 Tecman Advanced Material Engineers Ltd.

13.12.1 Tecman Advanced Material Engineers Ltd. Company Information

13.12.2 Tecman Advanced Material Engineers Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.12.3 Tecman Advanced Material Engineers Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Tecman Advanced Material Engineers Ltd. Main Business Overview

13.12.5 Tecman Advanced Material Engineers Ltd. Latest Developments

13.13 Elmelin Ltd

13.13.1 Elmelin Ltd Company Information

13.13.2 Elmelin Ltd Prismatic Battery Cell Compression Pad Product Portfolios and

Specifications

13.13.3 Elmelin Ltd Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Elmelin Ltd Main Business Overview

13.13.5 Elmelin Ltd Latest Developments

13.14 INOAC Corporation

13.14.1 INOAC Corporation Company Information

13.14.2 INOAC Corporation Prismatic Battery Cell Compression Pad Product

Portfolios and Specifications

13.14.3 INOAC Corporation Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 INOAC Corporation Main Business Overview

13.14.5 INOAC Corporation Latest Developments

13.15 Shenzhen Futureway Technology Co., Ltd.

13.15.1 Shenzhen Futureway Technology Co., Ltd. Company Information

13.15.2 Shenzhen Futureway Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.15.3 Shenzhen Futureway Technology Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Shenzhen Futureway Technology Co., Ltd. Main Business Overview

13.15.5 Shenzhen Futureway Technology Co., Ltd. Latest Developments

13.16 Cybrid Technologies Inc.

13.16.1 Cybrid Technologies Inc. Company Information

13.16.2 Cybrid Technologies Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.16.3 Cybrid Technologies Inc. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Cybrid Technologies Inc. Main Business Overview

13.16.5 Cybrid Technologies Inc. Latest Developments

13.17 Dongguan TAIYALUCK Electronic Technology Co., Ltd.

13.17.1 Dongguan TAIYALUCK Electronic Technology Co., Ltd. Company Information

13.17.2 Dongguan TAIYALUCK Electronic Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

13.17.3 Dongguan TAIYALUCK Electronic Technology Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Dongguan TAIYALUCK Electronic Technology Co., Ltd. Main Business Overview

13.17.5 Dongguan TAIYALUCK Electronic Technology Co., Ltd. Latest Developments

13.18 Hubei Xiangyuan New Material Technology Co., Ltd.

- 13.18.1 Hubei Xiangyuan New Material Technology Co., Ltd. Company Information
- 13.18.2 Hubei Xiangyuan New Material Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications
- 13.18.3 Hubei Xiangyuan New Material Technology Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.18.4 Hubei Xiangyuan New Material Technology Co., Ltd. Main Business Overview
- 13.18.5 Hubei Xiangyuan New Material Technology Co., Ltd. Latest Developments
- 13.19 LK Celltech Co., Ltd.
 - 13.19.1 LK Celltech Co., Ltd. Company Information
 - 13.19.2 LK Celltech Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications
 - 13.19.3 LK Celltech Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 LK Celltech Co., Ltd. Main Business Overview
 - 13.19.5 LK Celltech Co., Ltd. Latest Developments
- 13.20 UNITECH Co., Ltd.
 - 13.20.1 UNITECH Co., Ltd. Company Information
 - 13.20.2 UNITECH Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications
 - 13.20.3 UNITECH Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 UNITECH Co., Ltd. Main Business Overview
 - 13.20.5 UNITECH Co., Ltd. Latest Developments
- 13.21 INNOX Advanced Materials Co., Ltd.
 - 13.21.1 INNOX Advanced Materials Co., Ltd. Company Information
 - 13.21.2 INNOX Advanced Materials Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications
 - 13.21.3 INNOX Advanced Materials Co., Ltd. Prismatic Battery Cell Compression Pad Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 INNOX Advanced Materials Co., Ltd. Main Business Overview
 - 13.21.5 INNOX Advanced Materials Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Prismatic Battery Cell Compression Pad Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Prismatic Battery Cell Compression Pad Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Microcellular Polyurethane Foam

Table 4. Major Players of Silicone Foam and Silicone Sponge

Table 5. Major Players of Polyolefin Foam

Table 6. Major Players of Mineral-Based Composite

Table 7. Major Players of Others

Table 8. Global Prismatic Battery Cell Compression Pad Sales by Type (2021-2026) & (K Pcs)

Table 9. Global Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)

Table 10. Global Prismatic Battery Cell Compression Pad Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Type (2021-2026)

Table 12. Global Prismatic Battery Cell Compression Pad Sale Price by Type (2021-2026) & (US\$/Pc)

Table 13. Major Players of Cell-to-Cell Compression Pads

Table 14. Major Players of Cell-to-End Compression Pads

Table 15. Major Players of Others

Table 16. Global Prismatic Battery Cell Compression Pad Sales by Installation Position (2021-2026) & (K Pcs)

Table 17. Global Prismatic Battery Cell Compression Pad Sales Market Share by Installation Position (2021-2026)

Table 18. Global Prismatic Battery Cell Compression Pad Revenue by Installation Position (2021-2026) & (\$ million)

Table 19. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Installation Position (2021-2026)

Table 20. Global Prismatic Battery Cell Compression Pad Sale Price by Installation Position (2021-2026) & (US\$/Pc)

Table 21. Major Players of Up to 10%

Table 22. Major Players of Above 10% to 20%

Table 23. Major Players of Above 20% to 35%

Table 24. Major Players of Above 35%

Table 25. Global Prismatic Battery Cell Compression Pad Sales by Compression Ratio (2021-2026) & (K Pcs)

Table 26. Global Prismatic Battery Cell Compression Pad Sales Market Share by Compression Ratio (2021-2026)

Table 27. Global Prismatic Battery Cell Compression Pad Revenue by Compression Ratio (2021-2026) & (\$ million)

Table 28. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Compression Ratio (2021-2026)

Table 29. Global Prismatic Battery Cell Compression Pad Sale Price by Compression Ratio (2021-2026) & (US\$/Pc)

Table 30. Global Prismatic Battery Cell Compression Pad Sale by Application (2021-2026) & (K Pcs)

Table 31. Global Prismatic Battery Cell Compression Pad Sale Market Share by Application (2021-2026)

Table 32. Global Prismatic Battery Cell Compression Pad Revenue by Application (2021-2026) & (\$ million)

Table 33. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Application (2021-2026)

Table 34. Global Prismatic Battery Cell Compression Pad Sale Price by Application (2021-2026) & (US\$/Pc)

Table 35. Global Prismatic Battery Cell Compression Pad Sales by Company (2021-2026) & (K Pcs)

Table 36. Global Prismatic Battery Cell Compression Pad Sales Market Share by Company (2021-2026)

Table 37. Global Prismatic Battery Cell Compression Pad Revenue by Company (2021-2026) & (\$ millions)

Table 38. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Company (2021-2026)

Table 39. Global Prismatic Battery Cell Compression Pad Sale Price by Company (2021-2026) & (US\$/Pc)

Table 40. Key Manufacturers Prismatic Battery Cell Compression Pad Producing Area Distribution and Sales Area

Table 41. Players Prismatic Battery Cell Compression Pad Products Offered

Table 42. Prismatic Battery Cell Compression Pad Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 43. New Products and Potential Entrants

Table 44. Market M&A Activity & Strategy

Table 45. Global Prismatic Battery Cell Compression Pad Sales by Geographic Region

(2021-2026) & (K Pcs)

Table 46. Global Prismatic Battery Cell Compression Pad Sales Market Share
Geographic Region (2021-2026)

Table 47. Global Prismatic Battery Cell Compression Pad Revenue by Geographic
Region (2021-2026) & (\$ millions)

Table 48. Global Prismatic Battery Cell Compression Pad Revenue Market Share by
Geographic Region (2021-2026)

Table 49. Global Prismatic Battery Cell Compression Pad Sales by Country/Region
(2021-2026) & (K Pcs)

Table 50. Global Prismatic Battery Cell Compression Pad Sales Market Share by
Country/Region (2021-2026)

Table 51. Global Prismatic Battery Cell Compression Pad Revenue by Country/Region
(2021-2026) & (\$ millions)

Table 52. Global Prismatic Battery Cell Compression Pad Revenue Market Share by
Country/Region (2021-2026)

Table 53. Americas Prismatic Battery Cell Compression Pad Sales by Country
(2021-2026) & (K Pcs)

Table 54. Americas Prismatic Battery Cell Compression Pad Sales Market Share by
Country (2021-2026)

Table 55. Americas Prismatic Battery Cell Compression Pad Revenue by Country
(2021-2026) & (\$ millions)

Table 56. Americas Prismatic Battery Cell Compression Pad Sales by Type
(2021-2026) & (K Pcs)

Table 57. Americas Prismatic Battery Cell Compression Pad Sales by Application
(2021-2026) & (K Pcs)

Table 58. APAC Prismatic Battery Cell Compression Pad Sales by Region (2021-2026)
& (K Pcs)

Table 59. APAC Prismatic Battery Cell Compression Pad Sales Market Share by
Region (2021-2026)

Table 60. APAC Prismatic Battery Cell Compression Pad Revenue by Region
(2021-2026) & (\$ millions)

Table 61. APAC Prismatic Battery Cell Compression Pad Sales by Type (2021-2026) &
(K Pcs)

Table 62. APAC Prismatic Battery Cell Compression Pad Sales by Application
(2021-2026) & (K Pcs)

Table 63. Europe Prismatic Battery Cell Compression Pad Sales by Country
(2021-2026) & (K Pcs)

Table 64. Europe Prismatic Battery Cell Compression Pad Revenue by Country
(2021-2026) & (\$ millions)

Table 65. Europe Prismatic Battery Cell Compression Pad Sales by Type (2021-2026) & (K Pcs)

Table 66. Europe Prismatic Battery Cell Compression Pad Sales by Application (2021-2026) & (K Pcs)

Table 67. Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Country (2021-2026) & (K Pcs)

Table 68. Middle East & Africa Prismatic Battery Cell Compression Pad Revenue Market Share by Country (2021-2026)

Table 69. Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Type (2021-2026) & (K Pcs)

Table 70. Middle East & Africa Prismatic Battery Cell Compression Pad Sales by Application (2021-2026) & (K Pcs)

Table 71. Key Market Drivers & Growth Opportunities of Prismatic Battery Cell Compression Pad

Table 72. Key Market Challenges & Risks of Prismatic Battery Cell Compression Pad

Table 73. Key Industry Trends of Prismatic Battery Cell Compression Pad

Table 74. Prismatic Battery Cell Compression Pad Raw Material

Table 75. Key Suppliers of Raw Materials

Table 76. Prismatic Battery Cell Compression Pad Distributors List

Table 77. Prismatic Battery Cell Compression Pad Customer List

Table 78. Global Prismatic Battery Cell Compression Pad Sales Forecast by Region (2027-2032) & (K Pcs)

Table 79. Global Prismatic Battery Cell Compression Pad Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Americas Prismatic Battery Cell Compression Pad Sales Forecast by Country (2027-2032) & (K Pcs)

Table 81. Americas Prismatic Battery Cell Compression Pad Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. APAC Prismatic Battery Cell Compression Pad Sales Forecast by Region (2027-2032) & (K Pcs)

Table 83. APAC Prismatic Battery Cell Compression Pad Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 84. Europe Prismatic Battery Cell Compression Pad Sales Forecast by Country (2027-2032) & (K Pcs)

Table 85. Europe Prismatic Battery Cell Compression Pad Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Middle East & Africa Prismatic Battery Cell Compression Pad Sales Forecast by Country (2027-2032) & (K Pcs)

Table 87. Middle East & Africa Prismatic Battery Cell Compression Pad Revenue

Forecast by Country (2027-2032) & (\$ millions)

Table 88. Global Prismatic Battery Cell Compression Pad Sales Forecast by Type (2027-2032) & (K Pcs)

Table 89. Global Prismatic Battery Cell Compression Pad Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 90. Global Prismatic Battery Cell Compression Pad Sales Forecast by Application (2027-2032) & (K Pcs)

Table 91. Global Prismatic Battery Cell Compression Pad Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 92. Rogers Corporation Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 93. Rogers Corporation Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 94. Rogers Corporation Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 95. Rogers Corporation Main Business

Table 96. Rogers Corporation Latest Developments

Table 97. Saint-Gobain Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 98. Saint-Gobain Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 99. Saint-Gobain Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 100. Saint-Gobain Main Business

Table 101. Saint-Gobain Latest Developments

Table 102. Boyd Corporation Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 103. Boyd Corporation Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 104. Boyd Corporation Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 105. Boyd Corporation Main Business

Table 106. Boyd Corporation Latest Developments

Table 107. 3M Company Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 108. 3M Company Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 109. 3M Company Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 110. 3M Company Main Business

Table 111. 3M Company Latest Developments

Table 112. Aspen Aerogels, Inc. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 113. Aspen Aerogels, Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 114. Aspen Aerogels, Inc. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 115. Aspen Aerogels, Inc. Main Business

Table 116. Aspen Aerogels, Inc. Latest Developments

Table 117. Alkegen Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 118. Alkegen Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 119. Alkegen Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 120. Alkegen Main Business

Table 121. Alkegen Latest Developments

Table 122. JBC Technologies, Inc. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 123. JBC Technologies, Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 124. JBC Technologies, Inc. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 125. JBC Technologies, Inc. Main Business

Table 126. JBC Technologies, Inc. Latest Developments

Table 127. Tenneco Inc. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 128. Tenneco Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 129. Tenneco Inc. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 130. Tenneco Inc. Main Business

Table 131. Tenneco Inc. Latest Developments

Table 132. Adhex Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 133. Adhex Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 134. Adhex Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$

Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 135. Adhex Main Business

Table 136. Adhex Latest Developments

Table 137. Zotefoams plc Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 138. Zotefoams plc Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 139. Zotefoams plc Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 140. Zotefoams plc Main Business

Table 141. Zotefoams plc Latest Developments

Table 142. Morgan Advanced Materials plc Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 143. Morgan Advanced Materials plc Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 144. Morgan Advanced Materials plc Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 145. Morgan Advanced Materials plc Main Business

Table 146. Morgan Advanced Materials plc Latest Developments

Table 147. Tecman Advanced Material Engineers Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 148. Tecman Advanced Material Engineers Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 149. Tecman Advanced Material Engineers Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 150. Tecman Advanced Material Engineers Ltd. Main Business

Table 151. Tecman Advanced Material Engineers Ltd. Latest Developments

Table 152. Elmelin Ltd Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 153. Elmelin Ltd Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 154. Elmelin Ltd Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 155. Elmelin Ltd Main Business

Table 156. Elmelin Ltd Latest Developments

Table 157. INOAC Corporation Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 158. INOAC Corporation Prismatic Battery Cell Compression Pad Product

Portfolios and Specifications

Table 159. INOAC Corporation Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 160. INOAC Corporation Main Business

Table 161. INOAC Corporation Latest Developments

Table 162. Shenzhen Futureway Technology Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 163. Shenzhen Futureway Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 164. Shenzhen Futureway Technology Co., Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 165. Shenzhen Futureway Technology Co., Ltd. Main Business

Table 166. Shenzhen Futureway Technology Co., Ltd. Latest Developments

Table 167. Cybrid Technologies Inc. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 168. Cybrid Technologies Inc. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 169. Cybrid Technologies Inc. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 170. Cybrid Technologies Inc. Main Business

Table 171. Cybrid Technologies Inc. Latest Developments

Table 172. Dongguan TAIYALUCK Electronic Technology Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 173. Dongguan TAIYALUCK Electronic Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 174. Dongguan TAIYALUCK Electronic Technology Co., Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 175. Dongguan TAIYALUCK Electronic Technology Co., Ltd. Main Business

Table 176. Dongguan TAIYALUCK Electronic Technology Co., Ltd. Latest Developments

Table 177. Hubei Xiangyuan New Material Technology Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 178. Hubei Xiangyuan New Material Technology Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 179. Hubei Xiangyuan New Material Technology Co., Ltd. Prismatic Battery Cell

Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 180. Hubei Xiangyuan New Material Technology Co., Ltd. Main Business

Table 181. Hubei Xiangyuan New Material Technology Co., Ltd. Latest Developments

Table 182. LK Celltech Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 183. LK Celltech Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 184. LK Celltech Co., Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 185. LK Celltech Co., Ltd. Main Business

Table 186. LK Celltech Co., Ltd. Latest Developments

Table 187. UNITECH Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 188. UNITECH Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 189. UNITECH Co., Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 190. UNITECH Co., Ltd. Main Business

Table 191. UNITECH Co., Ltd. Latest Developments

Table 192. INNOX Advanced Materials Co., Ltd. Basic Information, Prismatic Battery Cell Compression Pad Manufacturing Base, Sales Area and Its Competitors

Table 193. INNOX Advanced Materials Co., Ltd. Prismatic Battery Cell Compression Pad Product Portfolios and Specifications

Table 194. INNOX Advanced Materials Co., Ltd. Prismatic Battery Cell Compression Pad Sales (K Pcs), Revenue (\$ Million), Price (US\$/Pc) and Gross Margin (2021-2026)

Table 195. INNOX Advanced Materials Co., Ltd. Main Business

Table 196. INNOX Advanced Materials Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Prismatic Battery Cell Compression Pad
- Figure 2. Prismatic Battery Cell Compression Pad Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Prismatic Battery Cell Compression Pad Sales Growth Rate 2021-2032 (K Pcs)
- Figure 7. Global Prismatic Battery Cell Compression Pad Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Prismatic Battery Cell Compression Pad Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Prismatic Battery Cell Compression Pad Sales Market Share by Country/Region (2025)
- Figure 10. Prismatic Battery Cell Compression Pad Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Microcellular Polyurethane Foam
- Figure 12. Product Picture of Silicone Foam and Silicone Sponge
- Figure 13. Product Picture of Polyolefin Foam
- Figure 14. Product Picture of Mineral-Based Composite
- Figure 15. Product Picture of Others
- Figure 16. Global Prismatic Battery Cell Compression Pad Sales Market Share by Type in 2026
- Figure 17. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Type (2021-2026)
- Figure 18. Product Picture of Cell-to-Cell Compression Pads
- Figure 19. Product Picture of Cell-to-End Compression Pads
- Figure 20. Product Picture of Others
- Figure 21. Global Prismatic Battery Cell Compression Pad Sales Market Share by Installation Position in 2026
- Figure 22. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Installation Position (2021-2026)
- Figure 23. Product Picture of Up to 10%
- Figure 24. Product Picture of Above 10% to 20%
- Figure 25. Product Picture of Above 20% to 35%
- Figure 26. Product Picture of Above 35%

Figure 27. Global Prismatic Battery Cell Compression Pad Sales Market Share by Compression Ratio in 2026

Figure 28. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Compression Ratio (2021-2026)

Figure 29. Prismatic Battery Cell Compression Pad Consumed in Electric Vehicle Traction Batteries

Figure 30. Global Prismatic Battery Cell Compression Pad Market: Electric Vehicle Traction Batteries (2021-2026) & (K Pcs)

Figure 31. Prismatic Battery Cell Compression Pad Consumed in Electrochemical Energy Storage Systems

Figure 32. Global Prismatic Battery Cell Compression Pad Market: Electrochemical Energy Storage Systems (2021-2026) & (K Pcs)

Figure 33. Prismatic Battery Cell Compression Pad Consumed in Specialty and Industrial Equipment Battery Systems

Figure 34. Global Prismatic Battery Cell Compression Pad Market: Specialty and Industrial Equipment Battery Systems (2021-2026) & (K Pcs)

Figure 35. Prismatic Battery Cell Compression Pad Consumed in Others

Figure 36. Global Prismatic Battery Cell Compression Pad Market: Others (2021-2026) & (K Pcs)

Figure 37. Global Prismatic Battery Cell Compression Pad Sale Market Share by Application (2025)

Figure 38. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Application in 2025

Figure 39. Prismatic Battery Cell Compression Pad Sales by Company in 2025 (K Pcs)

Figure 40. Global Prismatic Battery Cell Compression Pad Sales Market Share by Company in 2025

Figure 41. Prismatic Battery Cell Compression Pad Revenue by Company in 2025 (\$ millions)

Figure 42. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Company in 2025

Figure 43. Global Prismatic Battery Cell Compression Pad Sales Market Share by Geographic Region (2021-2026)

Figure 44. Global Prismatic Battery Cell Compression Pad Revenue Market Share by Geographic Region in 2025

Figure 45. Americas Prismatic Battery Cell Compression Pad Sales 2021-2026 (K Pcs)

Figure 46. Americas Prismatic Battery Cell Compression Pad Revenue 2021-2026 (\$ millions)

Figure 47. APAC Prismatic Battery Cell Compression Pad Sales 2021-2026 (K Pcs)

Figure 48. APAC Prismatic Battery Cell Compression Pad Revenue 2021-2026 (\$

millions)

Figure 49. Europe Prismatic Battery Cell Compression Pad Sales 2021-2026 (K Pcs)

Figure 50. Europe Prismatic Battery Cell Compression Pad Revenue 2021-2026 (\$ millions)

Figure 51. Middle East & Africa Prismatic Battery Cell Compression Pad Sales 2021-2026 (K Pcs)

Figure 52. Middle East & Africa Prismatic Battery Cell Compression Pad Revenue 2021-2026 (\$ millions)

Figure 53. Americas Prismatic Battery Cell Compression Pad Sales Market Share by Country in 2025

Figure 54. Americas Prismatic Battery Cell Compression Pad Revenue Market Share by Country (2021-2026)

Figure 55. Americas Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)

Figure 56. Americas Prismatic Battery Cell Compression Pad Sales Market Share by Application (2021-2026)

Figure 57. United States Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 58. Canada Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 59. Mexico Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 60. Brazil Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 61. APAC Prismatic Battery Cell Compression Pad Sales Market Share by Region in 2025

Figure 62. APAC Prismatic Battery Cell Compression Pad Revenue Market Share by Region (2021-2026)

Figure 63. APAC Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)

Figure 64. APAC Prismatic Battery Cell Compression Pad Sales Market Share by Application (2021-2026)

Figure 65. China Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 66. Japan Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 67. South Korea Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 68. Southeast Asia Prismatic Battery Cell Compression Pad Revenue Growth

2021-2026 (\$ millions)

Figure 69. India Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 70. Australia Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 71. China Taiwan Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 72. Europe Prismatic Battery Cell Compression Pad Sales Market Share by Country in 2025

Figure 73. Europe Prismatic Battery Cell Compression Pad Revenue Market Share by Country (2021-2026)

Figure 74. Europe Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)

Figure 75. Europe Prismatic Battery Cell Compression Pad Sales Market Share by Application (2021-2026)

Figure 76. Germany Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 77. France Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 78. UK Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 79. Italy Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 80. Russia Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 81. Middle East & Africa Prismatic Battery Cell Compression Pad Sales Market Share by Country (2021-2026)

Figure 82. Middle East & Africa Prismatic Battery Cell Compression Pad Sales Market Share by Type (2021-2026)

Figure 83. Middle East & Africa Prismatic Battery Cell Compression Pad Sales Market Share by Application (2021-2026)

Figure 84. Egypt Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 85. South Africa Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 86. Israel Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 87. Turkey Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 88. GCC Countries Prismatic Battery Cell Compression Pad Revenue Growth 2021-2026 (\$ millions)

Figure 89. Manufacturing Cost Structure Analysis of Prismatic Battery Cell Compression Pad in 2026

Figure 90. Manufacturing Process Analysis of Prismatic Battery Cell Compression Pad

Figure 91. Industry Chain Structure of Prismatic Battery Cell Compression Pad

Figure 92. Channels of Distribution

Figure 93. Global Prismatic Battery Cell Compression Pad Sales Market Forecast by Region (2027-2032)

Figure 94. Global Prismatic Battery Cell Compression Pad Revenue Market Share Forecast by Region (2027-2032)

Figure 95. Global Prismatic Battery Cell Compression Pad Sales Market Share Forecast by Type (2027-2032)

Figure 96. Global Prismatic Battery Cell Compression Pad Revenue Market Share Forecast by Type (2027-2032)

Figure 97. Global Prismatic Battery Cell Compression Pad Sales Market Share Forecast by Application (2027-2032)

Figure 98. Global Prismatic Battery Cell Compression Pad Revenue Market Share Forecast by Application (2027-2032)

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