

Global Thermal (Non-Rechargeable) Batteries Market Growth 2026-2032

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Abstracts

The global Thermal (Non-Rechargeable) Batteries market size is predicted to grow from US\$ 422 million in 2025 to US\$ 982 million in 2032; it is expected to grow at a CAGR of 11.2% from 2026 to 2032.

Thermal (Non-Rechargeable) Batteries are best understood as mission-specific, one-shot, high-power reserve power sources rather than general-purpose primary batteries. Their commercial value is not defined by cycle life, but by long dormant shelf life at ambient conditions, instant activation, high power delivery, and deterministic performance under shock, vibration, acceleration, and extreme thermal environments. That is why Thermal (Non-Rechargeable) Batteries remain deeply embedded in missiles, munitions, torpedo-defense systems, fuzes, guidance units, launch vehicles, and other mission-critical platforms where failure tolerance is extremely low. From a business perspective, the industry is therefore governed less by raw electrochemistry alone and more by platform qualification, engineering customization, process control, and lot-to-lot consistency.

The market is concentrated, but not monopolistic. Based on 2025 actuals, the top five suppliers by volume?EaglePicher Technologies, ASB Group, Diehl Energy Products, T?B?TAK SAGE, and RAFAEL?account for about 63.6% of global shipments; by revenue, the top five account for about 70.1%. EaglePicher Technologies alone holds roughly 19.3% of volume and 25.3% of revenue, highlighting its stronger exposure to higher-value platforms and premium mission profiles. ASB Group and Diehl Energy Products form the next global tier, while RAFAEL, T?B?TAK SAGE, and GS Yuasa retain strong positions in region-linked defense ecosystems and selected platform programs. The key point is that ?share? in Thermal (Non-Rechargeable) Batteries does not map one-to-one to profitability; qualification depth, system criticality, and mission

profile drive substantial ASP dispersion across vendors and programs.

Supply and demand are both becoming more strategically anchored. In 2025 actual production, Europe represents about 29.5% of global output, North America 22.3%, the Middle East 17.7%, and China 13.5%. On the demand side, North America accounts for about 37.7% of global consumption, Asia-Pacific 34.4%, and Europe 21.5%. This pattern shows that Thermal (Non-Rechargeable) Batteries are no longer a narrow domestic-defense consumable category; they sit at the intersection of cross-border weapons procurement, ammunition replenishment, missile-defense expansion, and supply-chain resilience. The broader defense backdrop remains supportive: defense spending and procurement investment accelerated further in Europe and Canada in 2024, and industrial programs to expand ammunition and missile capacity are increasingly shifting from emergency response to medium-term industrial base reconstruction.

The market structure is defined by a stable mainstream chemistry base and faster growth in selected niches. In 2025 actuals, lithium-silicon (LiSi) accounts for about 58.4% of volume and 61.1% of revenue, confirming its position as the anchor chemistry in Thermal (Non-Rechargeable) Batteries. Lithium-aluminum (LiAl) represents about 24.9% of volume, while LAN systems contribute about 11.1%, reflecting a multi-chemistry market shaped by different power, packaging, and mission-duration requirements rather than a single winning technology. By application, missiles and interceptors account for about 47.8% of volume and 48.6% of revenue in 2025, making them the primary demand engine; guided munitions and fuzes add another 22.4% of volume. Naval and underwater systems, as well as space/launch/emergency applications, remain smaller in absolute size but richer in value density. Commercial signals from the leading Japanese supplier are particularly notable: defense thermal battery orders are increasing, production is being automated and expanded, and space-launch programs are becoming a clearer commercial growth vector.

Thermal (Non-Rechargeable) Batteries are moving from a hidden subcomponent to a recognized strategic subsystem. Prime contractors and system integrators are paying increasing attention to delivery assurance, shelf-life stability, second-source readiness, and production repeatability, which reinforces long qualification cycles and high customer stickiness. At the same time, leading suppliers are responding through capital reinforcement, automation, and sourcing resilience rather than through simple capacity addition. Tuthill's acquisition of EaglePicher is a relevant signal in that regard, underscoring the strategic value attached to defense- and aerospace-grade battery franchises and adjacent energetic-device capabilities. The competitive axis is

increasingly shifting from isolated product leadership to industrial execution, qualification portability, and supply assurance.

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

This Insight Report provides a comprehensive analysis of the global Thermal (Non-Rechargeable) Batteries 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 Thermal (Non-Rechargeable) Batteries portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thermal (Non-Rechargeable) Batteries market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thermal (Non-Rechargeable) Batteries and breaks down the forecast by Anode Material, 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 Thermal (Non-Rechargeable) Batteries.

This report presents a comprehensive overview, market shares, and growth opportunities of Thermal (Non-Rechargeable) Batteries market by product type, application, key manufacturers and key regions and countries.

Segmentation by Anode Material:

Lithium-silicon (LiSi)

Lithium-aluminum (LiAl)

LAN

Others

Segmentation by Activation Method:

Electrical

Mechanical

Segmentation by Downstream Market:

Military

Civilian

Segmentation by Application:

Missiles & Interceptors

Guided Munitions & Fuzes

Naval & Underwater

EW, Decoys & Expendables

Space, Launch & Emergency Aviation

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.

EaglePicher Technologies (Tuthill Corporation)

ASB Group

Diehl Energy Products

RAFAEL

T?B?TAK SAGE

GS Yuasa

Vitzrocell

HBL Engineering

Myoniks

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thermal (Non-Rechargeable) Batteries market?

What factors are driving Thermal (Non-Rechargeable) Batteries market growth, globally and by region?

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

How do Thermal (Non-Rechargeable) Batteries market opportunities vary by end market size?

How does Thermal (Non-Rechargeable) Batteries break out by Anode Material, by Application?

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