

Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market Growth 2026-2032

<https://marketpublishers.com/r/G3D63D40D446EN.html>

Date: October 2026

Pages: 80

Price: US\$ 3,660.00 (Single User License)

ID: G3D63D40D446EN

Abstracts

The global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market size is predicted to grow from US\$ 32.87 million in 2025 to US\$ 1159 million in 2032; it is expected to grow at a CAGR of 66.7% from 2026 to 2032.

Ultra-high-nickel NCM cathode active material for semi-solid-state batteries refers to a powdered layered oxide primarily based on $\text{LiNi}_{1-x-y}\text{Co}_x\text{Mn}_y\text{O}_2$, in which nickel accounts for at least 90 mol% of the transition-metal layer. The material is specifically engineered for batteries using a solid–liquid hybrid electrolyte composed of a solid electrolyte together with a limited amount of liquid or gel electrolyte.

These materials employ single-crystal or structurally reinforced particles, bulk-element doping, concentration-gradient design, residual-lithium control and functional surface coatings—including oxides, phosphates, borates, niobates or solid-electrolyte-derived layers—to improve interfacial compatibility and lithium-ion transport. Such modifications suppress oxygen release, particle cracking, parasitic interfacial reactions, impedance growth and thermal instability under high states of charge, thereby enabling high specific capacity, high energy density, acceptable cycle life and improved safety.

The market scope covers cathode active material powders and integral functional coatings incorporated into the material, including merchant sales and equivalent-value captive transfers. It excludes NCM precursors, lithium salts, conductive additives, binders, separately supplied solid electrolytes, coated cathode sheets, battery cells and battery packs.

Key Findings

Ni90—<95 materials remained the largest nickel-content segment due to stronger production maturity, safety balance and customer qualification

Electric vehicles led demand, while drones, eVTOL aircraft and robotics provided faster premium-product qualification channels

Competition remained concentrated among customer-qualified suppliers with proprietary particle design, interface coatings and scale-up capabilities

Market Trends

The market is shifting from simply increasing nickel content toward the coordinated design of particle morphology, bulk chemistry and cathode—electrolyte interfaces. Single-crystal and quasi-single-crystal products are gaining importance because their lower grain-boundary density can reduce intergranular cracking and gas generation, although optimized polycrystalline secondary particles remain commercially relevant because of their mature production processes and competitive capacity performance. Surface treatment is evolving from conventional protective oxide coatings toward multilayer composite coatings and fast-ion-conducting interphases that simultaneously suppress side reactions and maintain lithium-ion transport. Ni?95 products are moving through pilot production and customer validation, while Ni90—<95 products continue to underpin near-term commercial programmes. Material suppliers are also integrating residual-lithium management, low-cobalt formulation, gradient structures and more precise particle-size distribution control. Commercial transactions are increasingly based on jointly developed customer-specific specifications rather than standardized spot grades, so pricing reflects raw-material content, coating complexity, production yield, qualification status and committed supply volume. The exceptional transition of the BASF Shanshan and WELION project from development to mass production within approximately one year illustrates the accelerating but highly collaborative commercialization model.

Market Dynamics

Drivers

The principal demand driver is the requirement for higher cell-level energy density without relying exclusively on a fully solid electrolyte architecture that remains difficult to manufacture at scale. Semi-solid-state batteries provide a transitional route that retains

part of the manufacturing base of conventional lithium-ion batteries while improving safety and enabling high-capacity cathodes, silicon-rich anodes or lithium-metal-related designs. Long-range premium electric vehicles represent the largest near-term demand source, while drones, eVTOL aircraft, humanoid robots and other weight-sensitive equipment create demand for high specific energy and high discharge power. Commercial adoption is also supported by the expansion of customer-qualified Ni90-series materials, new semi-solid vehicle programmes and cooperation between cathode producers and specialist solid-state battery developers.

Restraints

Market expansion is constrained by the limited number of semi-solid-state battery programmes that have reached stable mass production. Cathode materials are normally developed against a specific electrolyte, electrode formulation and cell process, resulting in long verification cycles and limited interchangeability between customers. Ultra-high nickel also raises the requirements for precursor consistency, calcination atmosphere, moisture control, residual lithium removal, coating uniformity and contamination management. Additional coating operations and relatively low early-stage production yields increase processing costs, while fluctuations in lithium hydroxide, nickel, cobalt and manganese prices affect customer purchasing decisions and supplier profitability. The economic advantage over mature liquid-electrolyte NCM batteries therefore depends on achieving higher energy density without excessive losses in cycle life, manufacturing throughput or pack-level safety.

Opportunities

The most attractive opportunity lies in material platforms that can serve both near-term semi-solid-state batteries and future all-solid-state batteries through adjustments to coatings, particle size and electrode formulation. Ni₉₅ single-crystal and mixed-morphology products provide a path toward premium electric mobility and aviation applications, while composite coatings based on solid-electrolyte-compatible or fast-ion-conducting compounds can create additional product differentiation. Low-altitude aviation, unmanned systems and embodied-intelligence equipment offer earlier commercialization opportunities because customers are more willing to pay for weight reduction and high energy density. Suppliers can also expand through integrated packages combining cathode active material, solid electrolyte, silicon-based anode material and interface engineering support. Regionalized production in Europe, North America and East Asia will become increasingly relevant as battery manufacturers seek qualified local materials and more traceable nickel, lithium and cobalt supply chains.

Challenges

The central technical challenge is to maintain structural and interfacial stability when nickel content and upper cut-off voltage increase. Ultra-high-nickel layered oxides are more susceptible to oxygen release, surface reconstruction, lithium–nickel disorder, anisotropic lattice changes and microcracking, while residual lithium compounds can promote gas generation and processing instability. In semi-solid systems, these intrinsic issues interact with solid electrolytes and limited liquid electrolyte, creating complex interphases that may increase resistance or undergo continuous chemical decomposition. A coating that is highly protective may restrict lithium-ion transport, whereas a conductive but chemically unstable layer may fail during storage or high-voltage cycling. Manufacturers must therefore control coating thickness, elemental distribution, particle strength and batch consistency at industrial scale. Commercial risk also arises from rapid changes in downstream electrolyte systems, as a material optimized for oxide, sulfide, polymer or hybrid electrolytes may require substantial redesign for another customer platform.

Industry Chain Analysis

The upstream industry comprises nickel, cobalt and manganese raw materials, lithium hydroxide, NCM precursors, dopants, coating compounds and solid-electrolyte-derived interface materials. Precursor morphology, impurity control and metal-ratio consistency directly influence the final cathode structure, making integrated nickel and precursor supply an important competitive advantage. Midstream production generally covers precursor selection or co-development, lithium mixing, controlled-atmosphere calcination, crushing, classification, washing or non-washing treatment, surface coating, secondary heat treatment and electrochemical quality control. Value creation is concentrated in formulation design, interface modification, manufacturing yield and customer-specific validation rather than in basic powder conversion alone. Downstream customers include semi-solid and solid-state cell manufacturers, conventional battery companies developing hybrid-electrolyte platforms and captive battery operations of vehicle manufacturers. The final demand chain extends to electric vehicles, low-altitude aircraft, unmanned systems, consumer devices, industrial robots and selected stationary storage projects. Closed-loop recycling and recovered nickel, cobalt and lithium are becoming additional elements of the supply chain as customers introduce carbon-footprint and traceability requirements.

Segment Insights

By nickel content, Ni₉₀–<95 products currently constitute the largest commercial segment. They offer a more established balance among discharge capacity, thermal stability, cycle performance, production yield and customer qualification than Ni₉₅ products. This segment includes materials already used in long-range vehicle batteries and emerging low-altitude applications. Ni₉₅ materials provide higher theoretical capacity and are expected to gain share, but most products remain in pilot production, qualification or initial supply because stricter controls are required for surface stability and production consistency. POSCO Future M, for example, has completed pilot development of a nickel-content-above-95% material, while other suppliers are expanding Ni₉₀-series products and next-generation solid-state-compatible grades.

By particle morphology, polycrystalline secondary-particle materials retain a meaningful position because of established capacity and processing economics. Single-crystal and quasi-single-crystal materials are gaining share in premium applications as suppliers seek to reduce particle cracking and gas generation. In practice, the market is also developing mixed-morphology and structurally reinforced products that combine the capacity advantages of optimized secondary particles with the mechanical stability of single-crystal materials. Interface modification represents an additional technology dimension: conventional oxide or phosphate coatings address basic surface protection, while composite and fast-ion-conducting coatings command greater strategic value in semi-solid-state systems.

Downstream Market Opportunities

Electric vehicles will remain the largest application because long-range premium models can absorb the higher material and validation costs while directly benefiting from improved energy density. Aircraft, drones and eVTOL platforms form the most attractive emerging segment, as battery weight has a direct impact on payload, flight time and operating range. Humanoid robots, autonomous industrial equipment and specialized mobile machinery provide another high-value opportunity where compact size, runtime and peak-power capability are more important than minimum material cost. Consumer electronics may adopt selected ultra-thin or high-capacity cell designs, but the addressable volume is fragmented. Stationary energy storage is expected to remain a secondary application because the sector prioritizes low cost, long cycle life and thermal robustness; opportunities are concentrated in weight- or space-constrained systems rather than utility-scale projects.

Regional Insights

China represents the largest and most commercially advanced regional market, supported by operating semi-solid battery projects, specialist cell developers and a broad domestic cathode-material supply chain. Direct commercial evidence includes BASF Shanshan's delivery of ultra-high-nickel NCM material to WELION, Ronbay's stable cooperation for liquid and semi-solid Ni90-series materials and Easpring's cumulative thousand-tonne shipments of cathode products for solid-liquid battery systems. Demand is extending from premium electric vehicles to drones, eVTOL aircraft and embodied-intelligence equipment.

South Korea is the principal technology-development region outside China. EcoPro BM has commercial Ni-content-above-90% and single-crystal capabilities while developing materials optimized for solid-state applications, and POSCO Future M has completed pilot development of Ni₉₅ material and is conducting solid-state cathode customer testing. Europe is strategically important for localized supply, sustainability requirements and advanced material R&D, but current demand remains more qualification-driven than volume-driven. North America is expected to develop through battery and automotive customer programmes and localized supply-chain investment rather than through a large independent semi-solid cathode market in the immediate term.

Competitive Landscape Analysis

The competitive landscape is narrow at the commercial level but broader at the technology-development level. BASF should be represented by BASF Shanshan Battery Materials, the manufacturing entity that has achieved mass production and delivery of an ultra-high-nickel NCM product for WELION's semi-solid-state batteries. Ronbay Technology is another core participant because its Ni90-series materials maintain stable semi-solid customer cooperation and have entered vehicle and low-altitude applications. Easpring Technology has developed solid-liquid battery cathode products across several chemistries and reported cumulative thousand-tonne shipments, giving it a significant customer-validation base. Xiamen Tungsten New Energy has achieved batch supply of solid-state-compatible cathode materials, while BTR has introduced an integrated semi-solid material solution containing high-nickel ternary cathodes.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Industry Forecast" looks at past sales and

reviews total world Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries sales in 2025, providing a comprehensive analysis by region and market sector of projected Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries sales for 2026 through 2032. With Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries industry.

This Insight Report provides a comprehensive analysis of the global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries.

This report presents a comprehensive overview, market shares, and growth opportunities of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Polycrystalline Secondary-Particle

Single-Crystal and Quasi-Single-Crystal

Segmentation by Nickel Content:

Ni90—<95

Ni?95

Segmentation by Application:

Electric Vehicles

Aircraft and Unmanned Aerial Vehicles

Consumer Electronics

Industrial Equipment and Robotics

Stationary Energy Storage 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.

BASF

Huayou Cobalt

Key Questions Addressed in this Report

What is the 10-year outlook for the global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market?

What factors are driving Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market growth, globally and by region?

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

How do Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries market opportunities vary by end market size?

How does Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries by Country/Region, 2021, 2025 & 2032

2.2 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Segment by Type

2.2.1 Polycrystalline Secondary-Particle

2.2.2 Single-Crystal and Quasi-Single-Crystal

2.2.3 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type

2.2.3.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

2.2.3.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue and Market Share by Type (2021-2026)

2.2.3.3 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Type (2021-2026)

2.3 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Segment by Nickel Content

2.3.1 Ni90—<95

2.3.2 Ni?95

2.3.3 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Sales by Nickel Content

2.3.3.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Nickel Content (2021-2026)

2.3.3.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue and Market Share by Nickel Content (2021-2026)

2.3.3.3 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Nickel Content (2021-2026)

2.4 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Segment by Application

2.4.1 Electric Vehicles

2.4.2 Aircraft and Unmanned Aerial Vehicles

2.4.3 Consumer Electronics

2.4.4 Industrial Equipment and Robotics

2.4.5 Stationary Energy Storage Systems

2.4.6 Others

2.4.7 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Sales by Application

2.4.7.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Market Share by Application (2021-2026)

2.4.7.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue and Market Share by Application (2021-2026)

2.4.7.3 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Breakdown Data by Company

3.1.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales by Company (2021-2026)

3.1.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Company (2021-2026)

3.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Revenue by Company (2021-2026)

3.2.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Company (2021-2026)

3.2.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Company (2021-2026)

3.3 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Sale Price by Company

3.4 Key Manufacturers Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Product Location Distribution

3.4.2 Players Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 ULTRA-HIGH-NICKEL NCM CATHODE ACTIVE MATERIAL FOR SEMI-SOLID-STATE BATTERIES BY GEOGRAPHIC REGION

4.1 World Historic Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market Size by Geographic Region (2021-2026)

4.1.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market Size by Country/Region (2021-2026)

4.2.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales by Country/Region (2021-2026)

4.2.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Revenue by Country/Region (2021-2026)

4.3 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Growth

4.4 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Growth

4.5 Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Growth

4.6 Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Growth

5 AMERICAS

5.1 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country

5.1.1 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026)

5.1.2 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country (2021-2026)

5.2 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026)

5.3 Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Region

6.1.1 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Region (2021-2026)

6.1.2 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Region (2021-2026)

6.2 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026)

6.3 APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries by Country

7.1.1 Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026)

7.1.2 Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country (2021-2026)

7.2 Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026)

7.3 Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries by Country

8.1.1 Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026)

8.1.2 Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country (2021-2026)

8.2 Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026)

8.3 Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

10.3 Manufacturing Process Analysis of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

10.4 Industry Chain Structure of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Distributors

11.3 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Customer

12 WORLD FORECAST REVIEW FOR ULTRA-HIGH-NICKEL NCM CATHODE ACTIVE MATERIAL FOR SEMI-SOLID-STATE BATTERIES BY GEOGRAPHIC REGION

12.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market Size Forecast by Region

12.1.1 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Forecast by Region (2027-2032)

12.1.2 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries 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 Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Forecast by Type (2027-2032)

12.7 Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 BASF

13.1.1 BASF Company Information

13.1.2 BASF Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Product Portfolios and Specifications

13.1.3 BASF Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 BASF Main Business Overview

13.1.5 BASF Latest Developments

13.2 Huayou Cobalt

13.2.1 Huayou Cobalt Company Information

13.2.2 Huayou Cobalt Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Product Portfolios and Specifications

13.2.3 Huayou Cobalt Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Huayou Cobalt Main Business Overview

13.2.5 Huayou Cobalt Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Polycrystalline Secondary-Particle

Table 4. Major Players of Single-Crystal and Quasi-Single-Crystal

Table 5. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026) & (Tons)

Table 6. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

Table 7. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Type (2021-2026)

Table 9. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Type (2021-2026) & (US\$/kg)

Table 10. Major Players of Ni90–<95

Table 11. Major Players of Ni?95

Table 12. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Nickel Content (2021-2026) & (Tons)

Table 13. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Nickel Content (2021-2026)

Table 14. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Nickel Content (2021-2026) & (\$ million)

Table 15. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Nickel Content (2021-2026)

Table 16. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Nickel Content (2021-2026) & (US\$/kg)

Table 17. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale by Application (2021-2026) & (Tons)

Table 18. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Market Share by Application (2021-2026)

Table 19. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Application (2021-2026) & (\$ million)

Table 20. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State

Batteries Revenue Market Share by Application (2021-2026)

Table 21. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Application (2021-2026) & (US\$/kg)

Table 22. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Company (2021-2026) & (Tons)

Table 23. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Company (2021-2026)

Table 24. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Company (2021-2026) & (\$ millions)

Table 25. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Company (2021-2026)

Table 26. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Price by Company (2021-2026) & (US\$/kg)

Table 27. Key Manufacturers Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Producing Area Distribution and Sales Area

Table 28. Players Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Products Offered

Table 29. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 30. New Products and Potential Entrants

Table 31. Market M&A Activity & Strategy

Table 32. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Geographic Region (2021-2026) & (Tons)

Table 33. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share Geographic Region (2021-2026)

Table 34. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 35. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Geographic Region (2021-2026)

Table 36. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country/Region (2021-2026) & (Tons)

Table 37. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country/Region (2021-2026)

Table 38. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country/Region (2021-2026) & (\$ millions)

Table 39. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Country/Region (2021-2026)

Table 40. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026) & (Tons)

Table 41. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country (2021-2026)

Table 42. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country (2021-2026) & (\$ millions)

Table 43. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026) & (Tons)

Table 44. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Application (2021-2026) & (Tons)

Table 45. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Region (2021-2026) & (Tons)

Table 46. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Region (2021-2026)

Table 47. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Region (2021-2026) & (\$ millions)

Table 48. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026) & (Tons)

Table 49. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Application (2021-2026) & (Tons)

Table 50. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026) & (Tons)

Table 51. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Country (2021-2026) & (\$ millions)

Table 52. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026) & (Tons)

Table 53. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Application (2021-2026) & (Tons)

Table 54. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Country (2021-2026) & (Tons)

Table 55. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Country (2021-2026)

Table 56. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Type (2021-2026) & (Tons)

Table 57. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Application (2021-2026) & (Tons)

Table 58. Key Market Drivers & Growth Opportunities of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Table 59. Key Market Challenges & Risks of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Table 60. Key Industry Trends of Ultra-high-nickel NCM Cathode Active Material for

Semi-Solid-State Batteries

Table 61. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Raw Material

Table 62. Key Suppliers of Raw Materials

Table 63. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Distributors List

Table 64. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Customer List

Table 65. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Region (2027-2032) & (Tons)

Table 66. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 67. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Country (2027-2032) & (Tons)

Table 68. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 69. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Region (2027-2032) & (Tons)

Table 70. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 71. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Country (2027-2032) & (Tons)

Table 72. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 73. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Country (2027-2032) & (Tons)

Table 74. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 75. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Type (2027-2032) & (Tons)

Table 76. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 77. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Forecast by Application (2027-2032) & (Tons)

Table 78. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 79. BASF Basic Information, Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Manufacturing Base, Sales Area and Its Competitors

Table 80. BASF Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State

Batteries Product Portfolios and Specifications

Table 81. BASF Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 82. BASF Main Business

Table 83. BASF Latest Developments

Table 84. Huayou Cobalt Basic Information, Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Manufacturing Base, Sales Area and Its Competitors

Table 85. Huayou Cobalt Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Product Portfolios and Specifications

Table 86. Huayou Cobalt Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 87. Huayou Cobalt Main Business

Table 88. Huayou Cobalt Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries
- Figure 2. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country/Region (2025)
- Figure 10. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Polycrystalline Secondary-Particle
- Figure 12. Product Picture of Single-Crystal and Quasi-Single-Crystal
- Figure 13. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type in 2026
- Figure 14. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Ni90–<95
- Figure 16. Product Picture of Ni?95
- Figure 17. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Nickel Content in 2026
- Figure 18. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Nickel Content (2021-2026)
- Figure 19. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Electric Vehicles
- Figure 20. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Electric Vehicles (2021-2026) & (Tons)
- Figure 21. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Aircraft and Unmanned Aerial Vehicles

Figure 22. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Aircraft and Unmanned Aerial Vehicles (2021-2026) & (Tons)

Figure 23. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Consumer Electronics

Figure 24. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Consumer Electronics (2021-2026) & (Tons)

Figure 25. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Industrial Equipment and Robotics

Figure 26. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Industrial Equipment and Robotics (2021-2026) & (Tons)

Figure 27. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Stationary Energy Storage Systems

Figure 28. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Stationary Energy Storage Systems (2021-2026) & (Tons)

Figure 29. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Consumed in Others

Figure 30. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Market: Others (2021-2026) & (Tons)

Figure 31. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sale Market Share by Application (2025)

Figure 32. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Application in 2025

Figure 33. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales by Company in 2025 (Tons)

Figure 34. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Company in 2025

Figure 35. Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue by Company in 2025 (\$ millions)

Figure 36. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Company in 2025

Figure 37. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales 2021-2026 (Tons)

Figure 40. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue 2021-2026 (\$ millions)

Figure 41. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State

Batteries Sales 2021-2026 (Tons)

Figure 42. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue 2021-2026 (\$ millions)

Figure 43. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales 2021-2026 (Tons)

Figure 44. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales 2021-2026 (Tons)

Figure 46. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue 2021-2026 (\$ millions)

Figure 47. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country in 2025

Figure 48. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Country (2021-2026)

Figure 49. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

Figure 50. Americas Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Application (2021-2026)

Figure 51. United States Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Region in 2025

Figure 56. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Region (2021-2026)

Figure 57. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

Figure 58. APAC Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Application (2021-2026)

Figure 59. China Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country in 2025

Figure 67. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share by Country (2021-2026)

Figure 68. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

Figure 69. Europe Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Application (2021-2026)

Figure 70. Germany Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share by Application (2021-2026)

Figure 78. Egypt Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State

Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries in 2026

Figure 84. Manufacturing Process Analysis of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Figure 85. Industry Chain Structure of Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries

Figure 86. Channels of Distribution

Figure 87. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Forecast by Region (2027-2032)

Figure 88. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share Forecast by Region (2027-2032)

Figure 89. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share Forecast by Type (2027-2032)

Figure 90. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share Forecast by Type (2027-2032)

Figure 91. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Sales Market Share Forecast by Application (2027-2032)

Figure 92. Global Ultra-high-nickel NCM Cathode Active Material for Semi-Solid-State Batteries Revenue Market Share Forecast by Application (2027-2032)

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