

Global Water-Based Binders for ?Lithium-Ion Battery Anode Market Growth 2026-2032

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Abstracts

The global Water-Based Binders for ?Lithium-Ion Battery Anode market size is predicted to grow from US\$ 755 million in 2025 to US\$ 1527 million in 2032; it is expected to grow at a CAGR of 10.7% from 2026 to 2032.

In 2025, global Water-Based Binders for ?Lithium-Ion Battery Anode production reached approximately 111.2 K Tons, with an average global market price of around 6937 USD per Ton.

Water-Based Binders for Lithium-Ion Battery Anode are aqueous polymer binder materials used in lithium-ion battery negative electrode formulations to bond anode active materials, conductive agents, and copper foil current collectors. They improve slurry dispersion, coating quality, peel strength, electrode flexibility, structural integrity, swelling resistance, and long-term cycling performance. They are widely used in graphite anodes and increasingly applied in silicon-carbon, silicon oxide, and other high-capacity anode systems.

The core value of water-based binders for lithium-ion battery anodes lies in their ability to combine environmental compatibility, safer processing, and electrode structural stability. By using water as the main solvent or dispersion medium, these binders help reduce reliance on solvent-based systems while improving slurry dispersion, coating uniformity, electrode adhesion, flexibility, and mechanical integrity. For graphite, silicon-carbon, silicon oxide, and other anode materials, they help address practical manufacturing and performance pain points such as powder shedding, electrode cracking, poor peel strength, and structural degradation during cycling. In silicon-based anodes, where volume expansion remains one of the biggest barriers to mass adoption, PAA, modified acrylic, and composite aqueous binders provide stronger interfacial

bonding and better stress-buffering capability, helping maintain the conductive network and electrode integrity.

From an industry perspective, demand is being driven by the battery sector's shift toward higher energy density, faster charging, longer cycle life, and cleaner manufacturing processes. As silicon-carbon, silicon oxide, fast-charging graphite, large-format cylindrical cells, and high-solid-content coating processes continue to advance, water-based anode binders are becoming more than auxiliary materials; they are evolving into critical functional enablers for next-generation anode systems. Their growth potential is grounded not in material substitution alone, but in real performance requirements, sustainable production trends, customized formulation capability, and stable large-scale supply. This makes the segment a low-volume but high-value niche within the lithium battery materials chain, with increasing strategic relevance as anode technologies continue to upgrade.

The upstream raw materials for water-based binders used in lithium-ion battery anodes vary significantly depending on the technical pathway. For the mainstream SBR/CMC systems used in traditional graphite anodes, key upstream materials include styrene, butadiene, refined cellulose, chloroacetic acid, caustic soda, and emulsion polymerization additives. In contrast, the PAA/acrylic-based systems—which are seeing rapid growth due to the adoption of silicon-based anodes—rely primarily on acrylic acid, acrylates, initiators, and neutralizing agents. Major global suppliers include Shell, SABIC, LyondellBasell, BASF, Nippon Shokubai, LG Chem, Nouryon, CABB, Suzano, Bracell, Kureha, Solvay, Arkema, and Daikin; key Chinese suppliers include Sinopec, PetroChina, Satellite Chemical, Wanhua Chemical, Dongyue Group, and Juhua Group. Downstream applications primarily span power batteries, energy storage batteries, and consumer electronics batteries, with typical customers including Panasonic, LG, Samsung, CATL, BYD, CALB, and Gotion High-Tech.

Production capacities for individual lines vary widely due to the differing manufacturing processes for product categories such as SBR, CMC, and PAA, while the industry's gross profit margin typically falls within the 35%–45% range.

United States market for Water-Based Binders for ?Lithium-Ion Battery Anode is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Water-Based Binders for ?Lithium-Ion Battery Anode is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026

through 2032.

Europe market for Water-Based Binders for ?Lithium-Ion Battery Anode is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Water-Based Binders for ?Lithium-Ion Battery Anode players cover ZEON, LG Chem, BASF, Arkema S.A., Ashland Inc., etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Water-Based Binders for ?Lithium-Ion Battery Anode 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 Water-Based Binders for ?Lithium-Ion Battery Anode portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Water-Based Binders for ?Lithium-Ion Battery Anode market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Water-Based Binders for ?Lithium-Ion Battery Anode 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 Water-Based Binders for ?Lithium-Ion Battery Anode.

This report presents a comprehensive overview, market shares, and growth opportunities of Water-Based Binders for ?Lithium-Ion Battery Anode market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

SRB

CMC

PAA

Others

Segmentation by Anode Materials:

Graphite Anode Type

Silicon-Carbon Anode Type

Segmentation by Application:

Power Battery

Energy Storage Battery

Consumer Battery

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.

ZEON

LG Chem

BASF

Arkema S.A.

Ashland Inc.

Nouryon

Nippon Paper Industries Co., Ltd.

Daicel

SUMITOMO SEIKA

Chongqing Lihong Fine Chemicals Co., Ltd.

Henan Jinbang Power Source Technology Co., Ltd.

Huitian New Material Co., Ltd.

Sichuan Indigo Materials Technologies Group Co.,Ltd.

Crystal Clear Elect

Blue Ocean and Black Stone Technology

Puyang Blue Star New Material Co., Ltd.

Guangzhou Songbai Chemical Co., Ltd.

Jinan Zhongbei Fine Chemical Co., Ltd.

Pustar

Eternal Materials

Shenzhen Yanyi New Material

Guangzhou Lushan New Materials

Wanhua Chemical Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Water-Based Binders for ?Lithium-Ion Battery Anode market?

What factors are driving Water-Based Binders for ?Lithium-Ion Battery Anode market growth, globally and by region?

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

How do Water-Based Binders for ?Lithium-Ion Battery Anode market opportunities vary by end market size?

How does Water-Based Binders for ?Lithium-Ion Battery Anode break out by Type, by Application?

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