

Global XBC Battery Slurry Market Growth 2026-2032

<https://marketpublishers.com/r/GBC365CDB33BEN.html>

Date: July 2026

Pages: 75

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

ID: GBC365CDB33BEN

Abstracts

The global XBC Battery Slurry market size is predicted to grow from US\$ 348 million in 2025 to US\$ 1296 million in 2032; it is expected to grow at a CAGR of 21.1% from 2026 to 2032.

In 2024, global XBC Battery Slurry production reached approximately 242 tons, with an average global market price of around US\$926 per kilogram. XBC Battery Slurry refers to conductive paste specifically designed for cross back contact solar cells, mainly silver paste. It enables fine rear-side electrode interconnection with high conductivity, low resistance, and excellent printability, supporting high-efficiency and low-loss xBC cell production.

The upstream of XBC battery slurry mainly includes metal raw materials and chemical additives precious metal raw materials, such as high-purity silver powder, glass powder (low-melting point glass), organic carriers, dispersants, adhesives, etc.; the downstream is BC solar cell manufacturers, such as Aixun Co., Ltd. and Longi Green Energy.

1. PERC cells entered mass production in 2017, reaching a 65% market share in 2019 and becoming the mainstream until being surpassed by TOPCon in 2024. We estimate that the market share of PERC cells, which previously dominated, will drop from 24% in 2024 to 8% in 2025, and will be less than 0.2% in 2030. TOPCon cells, the new mainstream cell type, will see their market share rise from 72% in 2024 to 82% in 2025, while XBC cells will see their market share rise from 4% in 2024 to 8% in 2025, reaching 25% in 2030.

2. In the future, new solar cells will gradually dominate the photovoltaic industry. Back contact (BC) cells differ materially from traditional single-sided cells because they collect irradiance on both the front and rear faces, which requires metallization and electrode preparation on both sides. That inherently raises the demand for conductive

materials such as photovoltaic silver paste in the near term. However, two important sources of uncertainty could moderate that demand growth: first, material innovation (for example, low-silver or silver-free conductive alternatives) may reduce per-unit silver consumption; second, evolving cell and module architectures could alter metallization patterns and material intensity. In short, under current technical pathways XBC adoption is a clear upward driver for silver-paste demand, but medium-to-long-term material and design innovations could change the trajectory.

3. From a performance-and-cost perspective, XBC cells deliver measurable generation gains but introduce additional process complexity and cost. Performance improvements stem from higher short-circuit current density, expanded rear-side metallization that lowers series resistance, and greater scope for front-surface passivation and optical optimization?factors that together raise photoelectric conversion efficiency. Under comparable constraints, XBC modules are estimated to deliver roughly +1 percentage point in absolute efficiency versus mainstream TOPCon modules, increase installed capacity per unit area by about 4.76%, and boost lifecycle energy output by approximately 8%. Conversely, the more intricate manufacturing flow increases processing difficulty, impacts yield, and raises unit production costs?key bottlenecks for large-scale rollout. At present, Longi and Aiko are among the most advanced in XBC commercialization and are expected to lead initial volume ramping in 2025, while many other manufacturers are adopting a follower strategy with slower progress.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for XBC Battery Slurry 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 XBC Battery Slurry.

This report presents a comprehensive overview, market shares, and growth opportunities of XBC Battery Slurry market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

p-poly Silver Paste

n-poly Silver Paste

Busbar Silver Paste

Segmentation by Application:

TBC Solar Cell

HPBC Solar Cell

HBC Solar Cell

ABC Solar Cell

IBC Solar Cell

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.

Jiangsu Riyu Photovoltaic New Materials

Wuxi DK Electronic Materials

Heraeus (Haitian)

Suzhou Isilver Materials

Guangzhou Rutech Development

Key Questions Addressed in this Report

What is the 10-year outlook for the global XBC Battery Slurry market?

What factors are driving XBC Battery Slurry market growth, globally and by region?

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

How do XBC Battery Slurry market opportunities vary by end market size?

How does XBC Battery Slurry break out by Type, by Application?

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