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LIB Cathode Conductive Auxiliary Agents Market by Product Type (Carbon Black, Carbon Nanotubes), Chemistry (NMC, NCA, LFP, LMO, LCO), Application (Automotive, Consumer Electronics, Energy Storage Systems, Industrial) - Global Forecast to 2029

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Abstracts

The LIB cathode conductive auxiliary agents market is projected to reach USD 4.32 billion by 2029, at a CAGR of 19.1% from USD 1.80 billion in 2024.

Key drivers in the LIB cathode conductive auxiliary agents market include growing demands for advanced cathode materials and improvements in technological levels regarding cathode material development. Cathode materials will be among the decisive elements of the energy density, cycle life, and general performance of the LIB, hence are among the focus areas for innovations. With the growth of EVs, renewable energy storage, and consumer electronics, the requirement for high-capacity and high-efficiency LIBS has grown significantly, thereby driving the demand for advanced cathode materials. Improved cathode technologies, including high-nickel chemistries such as NMC (Nickel-Manganese-Cobalt) and NCA (Nickel- Cobalt-Aluminum), are providing batteries with greater energy density and longer life cycles. Such advancements require additional conducting agents, carbon tubes and carbon black, to augment the electrical conductivity of the cathode and to ensure a uniform charge distribution in high- energy applications such as electric vehicles (EVs). Besides, the development of lithium iron phosphate (LFP) cell electrodes, which are considered relatively safe and economically beneficial, is also creating demand for such conductive agents to improve their performance.

“Carbon Black, by product type, accounts for the largest market share in terms of volume in 2024.”

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The most significant product type in terms of volume is likely to be carbon black, because it is an established conducting agent that is both cost-effective and widely available. Carbon black, as a conductive additive, plays a crucial role in the enhancement of electrical conductivity of cathode materials by allowing efficient electron transport and thereby improving overall battery performance. Its high surface area and superior conductivity make it indispensable for achieving uniform charge distribution and reducing resistance in LIB cathodes. Its further advantage is the compatibility of carbon black with several cathode chemistries, NMC (Nickel-Manganese-Cobalt), NCA (Nickel-Cobalt-Aluminum), and LFP (Lithium Iron Phosphate). These are cathode materials widely applied in electric vehicles (EVs), in consumer electronics, as well as energy storage systems, who significantly receive conductivity enhancements from carbon black.

“Lithium Nickel Manganese Cobalt Oxide (NMC) by chemistry will be the fastest growing chemistry type in terms of value in 2024.”

The fastest growth is expected to be NMC. The NMC is known for its balanced performance characteristics, featuring high energy density, thermal stability, and long cycle life, making it an attractive choice for an array of applications. Growth is mostly fostered by NMC that drives the greater utility in a comprehensive manner from electric vehicles to energy storage systems, including consumer electronics. Essential components needed are in the form of conductive auxiliary agents such as carbon black, carbon nanotubes (CNTs) used to increase the electrical conductivity in NMC cathodes to provide good charge transfer and better function. Advances in high power EV batteries and renewable energy storage solutions would, in turn, enhance and increase the utilization of advanced conductive agents compatible with the NMC chemistries.

“Automotive application will be the fastest growing in terms of volume in 2024.”

The automotive sector is set to become the fastest-growing application for lithium-ion battery cathode conductive auxiliary agents, spurred by the global shift toward EVs. The global automakers are rapidly investing in EV production to meet the growing demand from consumers for emission-free mobility solutions, thus raising the demand for high-performance batteries. LIBs, characterized by greater energy density, efficiency, and longevity, are the favorite source for the storage of energy in an EV, and cathode conductive auxiliary agents find a crucial role in bringing the required performance level. Conductive agents such as carbon black, CNTs, and graphene are used in improving

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the electrical conductivity of the cathode materials, thus improving electron transfer, reducing resistance, and showing greater charge-discharge efficiency. These properties are necessary for EV batteries, which would need high energy output, rapid charging capabilities, and extended lifecycles for modern transportation requirements. As adoption of EV increases globally, the automotive application for LIB cathode conductive auxiliary agents is set to grow exponentially in regions like Asia-Pacific, Europe, and North America and will be cemented as an important driver for the battery material market.

“Based on region, North America will be the second largest market in 2024.”

North America is expected to be the second biggest growth area for lithium-ion battery (LIB) cathode conductive auxiliary agents. Fast developments in both automotive and energy storage are going on there. Electric vehicle demand in North America has dramatically increased as of late due to government support and tight regulations against emission levels while providing incentives toward a greener source of transportation. Increased investment by major automobile producers in the US and Canada into production of EV and battery technologies supports the increased need for high-performance cathode materials as well as high-performance conductive auxiliary agents. Innovative research in new advanced battery material is strengthened across the region as a result of collaborations among academics, the industrial sector, and government bodies. Companies continue investing in improvement in battery performance as well as enhancing safety levels while promoting use of high-performance conducting agents. Furthermore, growing renewable energy projects in North America have increased the necessity for energy storage systems to maintain the balance of a grid. Optimized cathode conductive auxiliary agents in Lithium-ion batteries, such as carbon black, carbon nanotubes (CNTs), and graphene, are key components that meet these needs due to the superior energy density and long lifespan of Lithium-ion batteries.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

By Company Type: Tier 1 - 50%, Tier 2 - 20%, and Tier 3 - 30%

By Designation: Manger-Level - 30%, Director Level - 20%, and Others - 50%

By Region: North America - 20%, Europe -20%, Asia Pacific - 40%, Middle East

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& Africa - 10%, and South America-10%

The key players in this market are Birla Carbon (India), Orion S.A. (Luxembourg), Cabot Corporation (US), Imerys (France), Denka Company Limited (Japan), LG Chem (South Korea), Resonac Holdings Corporation (Japan), BTR New Material Group Co., Ltd (China), ZEON CORPORATION (Japan), ADEKA CORPORATION (Japan), TORAY INDUSTRIES, INC. (Japan), Shenzhen Dynanonic Co., Ltd (China), LION SPECIALTY CHEMICALS CO., LTD. (Japan), TPR CO.,LTD. (Japan), among others.

Research Coverage

This report segments the market for the LIB cathode conductive auxiliary agents market on the basis of product type, chemistry, application and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and deals associated with the market for the LIB cathode conductive auxiliar agents market.

Key benefits of buying this report

This research report is focused on various levels of analysis — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the LIB cathode conductive auxiliar agents market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers: The growing demand for cathodes is primarily driven by the rising adoption of lithium-ion batteries and continuous advancements in cathode materials drives the LIB cathode conductive auxiliary agents market

Market Penetration: Comprehensive information on the LIB cathode conductive auxiliar agents market offered by top players in the global LIB cathode conductive auxiliar agents market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the LIB cathode

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conductive auxiliary agents market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for the LIB cathode conductive auxiliar agents across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global LIB cathode conductive auxiliary agents market.

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the LIB cathode conductive auxiliary agents market.

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