

Second Life EV Battery Market by Application (Utility Scale, Commercial/Industrial, Residential), EV Sales Dynamics, EV Battery Demand & Potential Conversion Rate, Value Chain, Ecosystem & Business Model Analysis, and Region - Forecast to 2030

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Abstracts

The second life EV battery market is estimated at ~25-30 GWH in 2025 and is projected to reach ~330-350 GWH in 2030 at a CAGR of ~65% during the forecast period. The rapid growth of the second life EV battery market is significantly driven by proactive, supportive regulatory frameworks, industrial strategies, and technology funding to promote circular economy principles and energy security. Initiatives like the EU Battery Directive and funding programs like Horizon Europe are aimed at boosting battery repurposing infrastructure and setting clear end-of-life standards in Europe. Federal incentives, including tax credits under the Inflation Reduction Act and DOE-funded pilot projects (US) and scaling public-private partnerships, with subsidies and ambitious battery recycling & reuse targets in Asian countries, support energy transition targets while accelerating the second life EV battery market demand.

The commercial & industrial segment is the second prominent application of second Life EV batteries.

The commercial & industrial application segment is expected to gain momentum for second life EV battery usage with the growing demand for backup power, demand charge reduction, EV charging stations, mobile & modular storage, and solar energy optimization in warehouses or data centers. Among these, EV charging stations represent this segment's promising use case. EV batteries are left with 70-80% residual capacity and adaptability to medium-cycle demands, such as 50-150 cycles annually for uninterruptible power supply (UPS) and microgrid stabilization, which support their

usage for backup power and peak load management. Leading companies like Nissan, Renault, Tesla, Connected Energy (UK), and Enel X (Italy) are advancing second-life battery deployments in the C&I sector, often collaborating with utilities and technology partners. For example, Connected Energy has implemented systems at UK EV charging hubs, while Enel X pilots energy storage solutions at Italian airports. Other projects like Daimler's 15 MW industrial storage system and Amazon's deployment of second life EV batteries into logistics centers will contribute to the commitment toward their corporate sustainability goals. Furthermore, integrating these batteries with on-site solar or wind generation improves sustainability and cost-effectiveness by reducing reliance on grid power and minimizing the carbon footprint by 10-20% annually. Strategically, businesses can maximize economic benefits by co-locating storage and reuse facilities at high-power demand sites, enabling optimized energy management and cost savings.

Europe accounts for a significant market share of second life EV batteries.

Europe is one of the prominent markets for second-life EV batteries with a strong focus on the circular economy and a supportive regulatory environment. The region is home to global automotive OEMs and repurposing companies for EV batteries. Regional efforts such as integration of advanced renewable energy with a target to generate nearly 42% of electricity from these sources will drive demand for utility & grid-scale storage and industrial backups. In line with this, Renault launched an "advanced battery storage program" in 2018 using a combination of new and used EV batteries. It has an energy of 60 MWh battery and is installed in various parts across France and Germany, and is equipped to store electricity generated from renewable sources. Similar projects from other OEMs like Nissan, BMW, and Audi are aligned with Europe's net-zero target by 2030. In addition, some of the promising European EV battery repurposers include Connected Energy (UK), Allye Energy (UK), Zenob? (UK), Voltfang (Germany), BeePlanet Factory (Spain), Libattion (Switzerland), and The Mobility House (Germany). These players are responsible for developing large-scale stationary storage using batteries from passenger cars, trucks & buses, and commercial fleets. Government support, such as USD 1.97 billion allocated through Horizon Europe for battery innovation, combined with corporate initiatives like Volkswagen's plan to reuse 40 GWh of second-life batteries, is helping reduce entry barriers. Additionally, the region's well-established recycling ecosystem, spearheaded by companies like Northvolt, contributes to the scalability of the market. In line with the strong pipeline of new entrants in the repurposed arena and the high-end project activity in Europe, this regional leadership is expected to remain instrumental in the long run.

Research Coverage:

The report provides an in-depth analysis of the second-life EV battery market, focusing on the market ecosystem, technology roadmap, value chain analysis, various business model & their revenue streams, and potential installation demand by application (utility-scale grid services, commercial & industrial, and residential) and region (Asia Pacific, Europe, and North America). It examines EV sales trends (passenger cars & commercial vehicles), current & futuristic EV battery demand (lithium-ion, nickel-metal hydride, solid-state, and other battery chemistries), and performance/cost matrix by different battery chemistries, and EV market penetration to second life conversion rates.

Additionally, the report assesses the effects of the rising EV stocks and presents a future outlook based on industry-wise consumption patterns. It includes detailed information about the significant factors boosting the global demand and key growth impetuses. A thorough analysis of key industry players provides insights into their business overviews, product offerings, key strategies, contracts, partnerships, agreements, product launches, mergers, and acquisitions.

Key Benefits of Buying this Report:

The report provides valuable information for current vs. projected second-life EV battery installation capabilities across key global markets. It will assist stakeholders in understanding the competitive landscape, positioning their businesses more effectively, and planning appropriate go-to-market strategies. Additionally, the report will offer insights into the current market conditions and highlight different ownership models & their revenue profit streams within the industry.

The report provides insights into the following points:

Analysis of critical technology roadmap parameters such as battery assessment & testing approaches, cell-level & algorithm-based battery management system, various system integration techniques, and software platform strategies

Market Development: Comprehensive market information (the report analyzes & recommends the most dominant application demand across the considered regions under the scope)

Market Diversification: Exhaustive information about strategic collaborations, potential geography expansion, recent projections & their capacity, and

investments in the second-life EV battery industry

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product/technology offerings of leading OEMs & battery storage specialists such as Tesla, Volvo, Toyota Motor Corporation, BMW Group, Nissan Motor Corporation, Connected Energy, B2U Storage solutions, and Rejoule

Contents

1 INTRODUCTION

1.1 GLOBAL SECOND LIFE EV BATTERY INDUSTRY OVERVIEW

1.1.1 MAJOR DEMAND ZONES AND APPLICATIONS FOR SECOND LIFE EV BATTERIES

1.2 SECOND LIFE EV BATTERY MARKET DEFINITION & CONCEPT

1.3 INDUSTRY ECOSYSTEM

2 EXECUTIVE SUMMARY

2.1 REPORT SUMMARY

3 MARKET ASSESSMENT

3.1 INTRODUCTION

3.2 MARKET SIZING & GROWTH TRAJECTORY

3.2.1 BATTERY EV SALES & FORECASTS

3.2.1.1 Electric passenger car sales & forecast

3.2.1.2 Electric commercial vehicle sales & forecast

3.2.2 EV BATTERY MARKET DEMAND & FORECAST

3.2.2.1 EV battery market, by battery chemistry, 2024 vs. 2035 (Thousand Units)

3.2.2.2 Upcoming EV models and their battery chemistries, 2025–2026

3.2.2.3 Regional demand patterns for EV batteries

3.2.2.3.1 Asia Pacific

3.2.2.3.1.1 Asia Pacific: Cell supplier-wise battery demand, 2022–2024 (Megawatt-hour)

3.2.2.3.2 Europe

3.2.2.3.2.1 Europe: Cell supplier-wise battery demand, 2022–2024 (Megawatt-hour)

3.2.2.3.3 North America

3.2.2.3.3.1 North America: Cell supplier-wise battery demand, 2022–2024 (Megawatt-hour)

3.2.3 BATTERY CHEMISTRY PORTFOLIO STRATEGY

3.2.3.1 Lithium-ion categories (NMC, LFP, NCA, LTO)

3.2.3.1.1 Lithium-ion battery cell specifications

3.2.3.1.2 Lithium iron phosphate

3.2.3.1.3 Nickel manganese cobalt

- 3.2.3.1.4 Lithium iron manganese phosphate
- 3.2.3.2 Nickel-metal hydride
- 3.2.3.3 Solid-state batteries
- 3.2.3.4 Other battery types
- 3.2.4 PERFORMANCE/COST MATRIX, BY CHEMISTRY
- 3.3 SECOND LIFE EV BATTERY: TECHNOLOGY ROADMAP
 - 3.3.1 BATTERY ASSESSMENT TECHNOLOGIES
 - 3.3.1.1 Non-invasive testing methods
 - 3.3.1.2 AI-based degradation prediction
 - 3.3.2 BATTERY MANAGEMENT SYSTEM INNOVATIONS
 - 3.3.2.1 Adaptive control algorithm
 - 3.3.2.2 Cell-level management system
 - 3.3.3 SYSTEM INTEGRATION INNOVATIONS
 - 3.3.3.1 Modular architecture development
 - 3.3.3.2 Thermal management innovation
 - 3.3.3.3 Advancements in power electronics
 - 3.3.4 SOFTWARE PLATFORM STRATEGY
 - 3.3.4.1 Energy management system
 - 3.3.4.2 Market participation software
- 3.4 EV MARKET PENETRATION INTO SECOND LIFE CONVERSION RATES

4 VALUE CHAIN ANALYSIS

- 4.1 VALUE CHAIN
 - 4.1.1 SECOND LIFE EV BATTERY: VALUE ADDITION BY STAGE
 - 4.1.2 COLLECTION & LOGISTICS
 - 4.1.2.1 Key players and their recent developments in collection & logistics
 - 4.1.3 TESTING & ASSESSMENT
 - 4.1.3.1 Key players and their recent developments in testing capabilities
 - 4.1.4 REFURBISHMENT & REPURPOSING
 - 4.1.4.1 Major specialists and their recent developments in repurposing
 - 4.1.5 APPLICATION DEVELOPMENT & INTEGRATION
 - 4.1.5.1 Prominent application developers & integration providers and their recent developments
 - 4.1.6 DISTRIBUTION & MARKET DEPLOYMENT
 - 4.1.6.1 Key market deployment players and their recent developments
 - 4.1.7 END-OF-LIFE RECYCLING
 - 4.1.7.1 Key end-of-life recyclers and their recent developments

5 SECOND LIFE EV BATTERY MARKET, BY APPLICATION

5.1 INTRODUCTION

5.2 UTILITY-SCALE GRID SERVICES

5.2.1 PROMINENT UTILITY-SCALE PROVIDERS & THEIR CAPACITIES

5.2.2 RENEWABLE ENERGY

5.2.2.1 Solar power

5.2.2.2 Wind energy

5.3 COMMERCIAL & INDUSTRIAL

5.3.1 EV CHARGING STATIONS

5.3.2 EV CHARGING STATION SITES EQUIPPED WITH SECOND LIFE EV

BATTERIES, BY REGION

5.4 RESIDENTIAL APPLICATION

6 REGIONAL MARKET ANALYSIS

6.1 INTRODUCTION

6.2 NORTH AMERICA

6.2.1 OVERVIEW

6.2.1.1 Key players and their second life EV battery installation projects

6.2.2 MAJOR INVESTMENT DRIVERS & GOVERNMENT INITIATIVES

6.2.3 GROWTH OUTLOOK & CONCLUSION

6.3 EUROPE

6.3.1 OVERVIEW

6.3.1.1 Key players and their second life EV battery installation projects

6.3.2 STRATEGIC ALIGNMENT, SCALABLE APPLICATIONS, AND MARKET

READINESS BY 2030

6.3.3 OUTLOOK & CONCLUSION

6.4 ASIA PACIFIC

6.4.1 OVERVIEW

6.4.1.1 Key players and their second life EV battery installation projects

6.4.2 MANUFACTURING LEADERSHIP EXCELLENCE

6.4.3 OUTLOOK & CONCLUSION

7 COMPETITIVE LANDSCAPE

7.1 COMPETITIVE POSITIONING

7.2 BUSINESS MODELS

7.2.1 OWNERSHIP MODELS

- 7.2.1.1 Battery leasing & rentals
- 7.2.1.2 Battery-as-a-service (BaaS)
- 7.2.1.3 Mobile BESS for temporary power supply
- 7.2.1.4 Energy-as-a-service (EaaS)

7.2.2 REVENUE STREAMS

7.2.3 CUSTOMER ACQUISITION STRATEGIES

7.2.4 PROFITABILITY ANALYSIS

7.3 GLOBAL OEMS' SECOND LIFE EV BATTERY INSTALLATION PROJECTS & THEIR CAPACITIES

7.4 KEY BATTERY REPURPOSERS AND THEIR CURRENT VS. PROJECTED CAPACITY

8 STRATEGIC RECOMMENDATIONS

9 KEY PLAYERS' STRATEGIC PROFILES

9.1 AUTOMOTIVE OEMS

9.1.1 TESLA

- 9.1.1.1 Overview
- 9.1.1.2 Recent financials
- 9.1.1.3 Tesla: Global EV sales, by key model
- 9.1.1.4 Strategic approach toward second life EV batteries
- 9.1.1.5 Recent developments, 2019–2025

9.1.2 TOYOTA MOTOR CORPORATION

- 9.1.2.1 Overview
- 9.1.2.2 Recent financials
- 9.1.2.3 Toyota Motor Corporation: Global EV sales, by key model
- 9.1.2.4 Strategic approach toward second life EV batteries
- 9.1.2.5 Recent developments, 2019–2025

9.1.3 NISSAN MOTOR CO., LTD.

- 9.1.3.1 Overview
- 9.1.3.2 Recent financials
- 9.1.3.3 Nissan Motors Co., Ltd.: Global EV sales, by key model
- 9.1.3.4 Continued investment in global network expansion for battery collection and repurposing technologies
- 9.1.3.5 Recent developments, 2010–2025

9.1.4 AB VOLVO

- 9.1.4.1 Overview
- 9.1.4.2 Recent financials

9.1.4.3 Strategic approach toward second life EV batteries

9.1.4.4 Recent developments, 2022–2023

9.1.5 VOLKSWAGEN GROUP

9.1.5.1 Overview

9.1.5.2 Recent financials

9.1.5.3 Volkswagen Group: Global EV sales, by key model

9.1.5.4 Strategic approach toward second life EV batteries

9.1.5.5 Recent developments, 2021–2025

9.1.6 BMW AG

9.1.6.1 Overview

9.1.6.2 Recent financials

9.1.6.3 BMW AG: Global EV sales, by key model

9.1.6.4 Strategic approach toward second life EV batteries

9.1.6.5 Recent developments, 2020–2025

9.2 ENERGY STORAGE & SECOND LIFE BATTERY SPECIALISTS

9.2.1 CONNECTED ENERGY

9.2.1.1 Overview

9.2.1.2 Products, capacity, and applications

9.2.1.3 Recent developments, 2021–2025

9.2.2 B2U STORAGE SOLUTIONS, INC.

9.2.2.1 Overview

9.2.2.2 Products, capacity, and application

9.2.2.3 Recent developments, 2021–2024

9.2.3 REJOULE

9.2.3.1 Overview

9.2.3.2 Products, capacity, and application

9.2.3.3 Projects

9.2.3.4 Recent developments, 2023–2025

9.2.4 EATON

9.2.4.1 Overview

9.2.4.2 Recent financials

9.2.4.3 Products, capacity, and application

9.2.4.4 Recent developments, 2024

9.2.5 E.BATTERY SYSTEMS AG

9.2.5.1 Overview

9.2.5.2 Products, capacity, and application

9.2.5.3 Recent developments, 2021–2025

10 APPENDIX

10.1 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

10.2 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 ELECTRIC PASSENGER CAR SALES, BY REGION, 2019–2023
(THOUSAND UNITS)

TABLE 2 ELECTRIC PASSENGER CAR SALES, BY REGION, 2024–2030
(THOUSAND UNITS)

TABLE 3 ELECTRIC COMMERCIAL VEHICLES MARKET, BY VEHICLE TYPE,
2019–2023 (UNITS)

TABLE 4 ELECTRIC COMMERCIAL VEHICLES MARKET, BY VEHICLE TYPE,
2024–2030 (UNITS)

TABLE 5 EV BATTERY MARKET, BY BATTERY TYPE, 2019–2023 (THOUSAND
UNITS)

TABLE 6 EV BATTERY MARKET, BY BATTERY TYPE, 2024–2030 (THOUSAND
UNITS)

TABLE 7 EV BATTERY MARKET, BY BATTERY TYPE, 2031–2035 (THOUSAND
UNITS)

TABLE 8 BATTERY CHEMISTRIES IN CURRENT AND UPCOMING EV MODELS, BY
OEM, 2025–2026

TABLE 9 ASIA PACIFIC: CELL SUPPLIER-WISE BATTERY DEMAND PATTERN,
2022–2024 (MWH)

TABLE 10 EUROPE: CELL SUPPLIER-WISE BATTERY DEMAND PATTERN,
2022–2024 (MWH)

TABLE 11 NORTH AMERICA: CELL SUPPLIER-WISE BATTERY DEMAND
PATTERN, 2022–2024 (MWH)

TABLE 12 LITHIUM-ION: EV BATTERY MARKET, BY REGION, 2019–2023
(THOUSAND UNITS)

TABLE 13 LITHIUM-ION: EV BATTERY MARKET, BY REGION, 2024–2030
(THOUSAND UNITS)

TABLE 14 LITHIUM-ION: EV BATTERY MARKET, BY REGION, 2031–2035
(THOUSAND UNITS)

TABLE 15 COMPARISON BETWEEN LITHIUM-ION BATTERY CHEMISTRIES

TABLE 16 LITHIUM IRON PHOSPHATE: EV BATTERY MARKET, BY REGION,
2019–2023 (THOUSAND UNITS)

TABLE 17 LITHIUM IRON PHOSPHATE: EV BATTERY MARKET, BY REGION,
2024–2030 (THOUSAND UNITS)

TABLE 18 LITHIUM IRON PHOSPHATE: EV BATTERY MARKET, BY REGION,
2031–2035 (THOUSAND UNITS)

TABLE 19 NICKEL MANGANESE COBALT: EV BATTERY MARKET, BY REGION,

2019–2023 (THOUSAND UNITS)

TABLE 20 NICKEL MANGANESE COBALT: EV BATTERY MARKET, BY REGION,
2024–2030 (THOUSAND UNITS)

TABLE 21 NICKEL MANGANESE COBALT: EV BATTERY MARKET, BY REGION,
2031–2035 (THOUSAND UNITS)

TABLE 22 NICKEL-METAL HYDRIDE: EV BATTERY MARKET, BY REGION,
2019–2023 (THOUSAND UNITS)

TABLE 23 NICKEL-METAL HYDRIDE: EV BATTERY MARKET, BY REGION,
2024–2030 (THOUSAND UNITS)

TABLE 24 NICKEL-METAL HYDRIDE: EV BATTERY MARKET, BY REGION,
2031–2035 (THOUSAND UNITS)

TABLE 25 SOLID-STATE BATTERIES: RECENT DEVELOPMENTS

TABLE 26 SOLID-STATE BATTERIES: EV BATTERY MARKET, BY REGION,
2019–2023 (THOUSAND UNITS)

TABLE 27 SOLID-STATE BATTERIES: EV BATTERY MARKET, BY REGION,
2024–2030 (THOUSAND UNITS)

TABLE 28 SOLID-STATE BATTERIES: EV BATTERY MARKET, BY REGION,
2031–2035 (THOUSAND UNITS)

TABLE 29 OTHER BATTERY TYPES: EV BATTERY MARKET, BY REGION,
2019–2023 (THOUSAND UNITS)

TABLE 30 OTHER BATTERY TYPES: EV BATTERY MARKET, BY REGION,
2024–2030 (THOUSAND UNITS)

TABLE 31 OTHER BATTERY TYPES: EV BATTERY MARKET, BY REGION,
2031–2035 (THOUSAND UNITS)

TABLE 32 EV BATTERY CHEMISTRIES: COST VS. PERFORMANCE COMPARISON

TABLE 33 NON-INVASIVE TESTING METHODS

TABLE 34 LIST OF COMPANIES INVOLVED IN NON-INVASIVE TESTING METHODS

TABLE 35 ADVANTAGES OF AI-BASED DEGRADATION PREDICTION

TECHNOLOGY

TABLE 36 BENEFITS OF ADAPTIVE CONTROL ALGORITHMS IN SECOND LIFE EV
BATTERY MANAGEMENT SYSTEM (BMS)

TABLE 37 MAJOR COMPANIES INVOLVED IN SECOND LIFE BATTERY
INTEGRATION INNOVATION

TABLE 38 LIST OF COMPANIES WORKING ON MODULAR ARCHITECTURE
INTEGRATION FOR SECOND LIFE EV BATTERIES

TABLE 39 KEY DEVELOPMENTS UNDERTAKEN BY COMPANIES IN POWER
ELECTRONICS

TABLE 40 COMPANIES WORKING ON ENERGY MANAGEMENT SYSTEM (EMS)
FOR SECOND LIFE EV BATTERIES

TABLE 41 VALUE CHAIN: STAGE-WISE VALUE DISTRIBUTION (%)

TABLE 42 RECENT DEVELOPMENTS UNDERTAKEN BY PLAYERS IN MAINTAINING COLLECTION & LOGISTICS OF SECOND LIFE EV BATTERIES

TABLE 43 RECENT DEVELOPMENTS UNDERTAKEN BY KEY PLAYERS IN TESTING AND ASSESSMENT OF SECOND LIFE EV BATTERIES

TABLE 44 RECENT DEVELOPMENTS UNDERTAKEN BY KEY PLAYERS IN REFURBISHMENT AND REPURPOSING OF SECOND LIFE EV BATTERIES

TABLE 45 KEY PLAYERS INVOLVED IN APPLICATION DEVELOPMENT AND INTEGRATION OF SECOND LIFE BATTERIES

TABLE 46 KEY PLAYERS INVOLVED IN APPLICATION DISTRIBUTION AND MARKET DEPLOYMENT OF SECOND LIFE BATTERY

TABLE 47 KEY PLAYERS INVOLVED IN END-OF-LIFE RECYCLING OF SECOND LIFE BATTERIES

TABLE 48 KEY UTILITY-SCALE SECOND LIFE EV BATTERY STORAGE PROJECTS AND DEPLOYMENTS

TABLE 49 KEY COMMERCIAL & INDUSTRIAL APPLICATIONS

TABLE 50 EV CHARGING STATIONS AND SITES EQUIPPED WITH SECOND LIFE EV BATTERIES, BY REGION

TABLE 51 NORTH AMERICA: KEY PLAYERS AND THEIR DEVELOPMENTS

TABLE 52 EUROPE: KEY PLAYERS AND THEIR DEVELOPMENTS

TABLE 53 ASIA PACIFIC: KEY PLAYERS AND THEIR DEVELOPMENTS

TABLE 54 OWNERSHIP MODELS & THEIR BUSINESS OUTCOMES

TABLE 55 BUSINESS MODELS & THEIR CASH FLOW APPROACH

TABLE 56 KEY OEMS' SECOND LIFE EV BATTERY INSTALLATION PROJECTS & THEIR CAPACITIES

TABLE 57 KEY BATTERY REPURPOSERS AND THEIR CURRENT VS. PROJECTED CAPACITY

TABLE 58 TESLA: RECENT FINANCIALS, 2023 VS. 2024

TABLE 59 TESLA: GLOBAL EV SALES, 2022–2024

TABLE 60 TOYOTA MOTOR CORPORATION: RECENT FINANCIALS, 2023 VS. 2024

TABLE 61 TOYOTA MOTOR CORPORATION: GLOBAL EV SALES, 2022–2024

TABLE 62 NISSAN MOTORS CO., LTD.: RECENT FINANCIALS, 2023 VS. 2024

TABLE 63 NISSAN MOTORS CO., LTD.: GLOBAL EV SALES, 2022–2024

TABLE 64 AB VOLVO: RECENT FINANCIALS, 2023 VS. 2024

TABLE 65 VOLKSWAGEN GROUP: RECENT FINANCIALS, 2023 VS. 2024

TABLE 66 VOLKSWAGEN GROUP: GLOBAL EV SALES, 2022–2024

TABLE 67 BMW AG: RECENT FINANCIALS, 2023 VS. 2024

TABLE 68 BMW AG: GLOBAL EV SALES, 2022–2024

TABLE 69 CONNECTED ENERGY: PRODUCTS OFFERED

TABLE 70 B2U STORAGE SOLUTIONS, INC.: PRODUCTS OFFERED

TABLE 71 REJOULE: PRODUCTS OFFERED

TABLE 72 REJOULE: PROJECTS

TABLE 73 EATON: RECENT FINANCIALS, 2023 VS. 2024

TABLE 74 EATON: PRODUCTS OFFERED

TABLE 75 E.BATTERY SYSTEMS AG: PRODUCTS OFFERED

List Of Figures

LIST OF FIGURES

FIGURE 1 LIFE CYCLE OF EV BATTERIES OFFERING SECOND LIFE APPLICATIONS

FIGURE 2 SECOND LIFE EV BATTERY INDUSTRY ECOSYSTEM

FIGURE 3 SECOND LIFE EV BATTERY MARKET OUTLOOK

FIGURE 4 ELECTRIC COMMERCIAL VEHICLES MARKET, BY VEHICLE TYPE, 2024 VS. 2030 (UNITS)

FIGURE 5 LITHIUM-ION SEGMENT TO ACCOUNT FOR LARGEST MARKET DURING FORECAST PERIOD

FIGURE 6 ASIA PACIFIC TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 7 LITHIUM-ION: COMPARISON BETWEEN WH/KG AND WH/L

FIGURE 8 EVS EQUIPPED WITH LITHIUM-ION BATTERIES

FIGURE 9 LITHIUM-ION BATTERY CELL SPECIFICATIONS

FIGURE 10 COMPARISON BETWEEN LFP AND LITHIUM-ION BATTERIES

FIGURE 11 COMPARISON BETWEEN LFP AND NCA/NMC BATTERY CHEMISTRIES

FIGURE 12 FEATURES AND ADVANTAGES OF SODIUM-ION BATTERIES

FIGURE 13 GLOBALLY AVAILABLE SECOND LIFE EV BATTERY CAPACITY VS. ACTUAL INSTALLED SECOND LIFE EV BATTERY CAPACITY, 2025 VS. 2030 (GIGAWATT-HOURS)

FIGURE 14 SECOND LIFE EV BATTERY VALUE CHAIN: VALUE ADDED BY STAGE

FIGURE 15 SECOND LIFE EV BATTERY MARKET, BY APPLICATION, 2025–2030 (GWH)

FIGURE 16 GLOBAL EV BATTERY CAPACITY AVAILABILITY VS. ACTUAL INSTALLATION, 2025–2030 (GWH)

FIGURE 17 SECOND LIFE EV BATTERY MARKET, BY REGION, 2025–2030 (GWH)

FIGURE 18 SECOND LIFE EV BATTERIES: POTENTIAL BUSINESS MODELS

FIGURE 19 STRATEGIC RECOMMENDATIONS FOR VARIOUS STAKEHOLDERS

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