

Lithium-ion Battery Separator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Lithium-ion Battery Separator Market size is estimated at USD 5.42 billion in 2024, and is expected to reach USD 12.17 billion by 2029, growing at a CAGR of 17.60% during the forecast period (2024-2029).

Over the medium term, factors such as declining lithium-ion battery prices and the increasing adoption of electric vehicles are expected to drive the market.

On the other hand, the demand-supply mismatch of raw materials is expected to restrain the market growth during the forecast period.

Moreover, advancements in battery technology have dramatically increased the demand for improvements in separator design. Current separators, either in commercial usage or under the development stage, have yet to meet the high stability and lifespan performance standards necessary to prevent deterioration in the efficiency and reliability of battery technologies. This will likely create immense opportunities for the market studied during the forecast period.

The Asia-Pacific is expected to be the largest and fastest-growing market during the forecast period, with most of the demand coming from countries like China, Japan, etc.

Lithium Ion Battery Separator Market Trends

Increasing Adoption of Electric Vehicles is Expected to Drive the Market

Countries in the region are the leading proponents of the global lithium-ion battery supply chain, with China, Japan, and South Korea leading the way. Countries like Australia, India, and Vietnam are also following plans to set up battery manufacturing facilities in their countries during the forecast period.

A significant fraction of Asia-Pacific's population is estimated to live without electricity and depend on conventional fuels, such as kerosene and diesel, for their lighting and mobile phone charging needs. Lithium-ion battery integrated energy storage solutions are likely to witness an increasing rate of adoption due to the technical benefits associated with it and declining lithium-ion battery prices. This, in turn, is expected to create significant opportunities for li-ion battery separator manufacturers during the forecast period.

The demand for lithium-ion batteries in the region is expected to grow rapidly, owing to the adoption of new energy vehicles (NEVs) and ESS for on-grid and off-grid applications.

Furthermore, China is expected to dominate with a 57% share of the global EV market by 2030. The development of charging infrastructure is propelling EV adoption in the country. As of August 2023, EVCIPA confirmed that there were a total of 7,208,000 charging infrastructure units (public + private) in China, of which 2,272,000 charging stands were public and 4,936,000 were private.

By 2050, Japan aims to establish a 'Well-to-Wheel Zero Emission' policy, in line with the global efforts to eliminate emissions, focusing on energy supply and vehicle innovation. Replacing all vehicles with EVs can reduce greenhouse gas emissions by around 80% per vehicle, including an approximate 90% reduction per passenger vehicle. Such government initiatives are likely to increase the demand for electronic vehicles, which, in turn, is likely to increase the demand for lithium-ion batteries.

South Korea is also a major player in the car manufacturing market, with large corporations like Hyundai, Kia Motors, and Renault. The increasing adoption of electric vehicles is expected to increase the demand for lithium-ion batteries and their supply chain accessories, such as lithium-ion battery separators, in the country.

Therefore, based on the factors mentioned above, Asia-Pacific is expected to dominate the lithium-ion battery separator market during the forecast period.

The Asia-Pacific is Expected to Dominate the Market

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Therefore, based on the factors mentioned above, the Asia-Pacific region is expected to dominate the lithium-ion battery separator market during the forecast period.

Lithium-ion Battery Separator Industry Overview

The lithium-ion battery separator market is moderately fragmented. Some of the major players operating in this market include (in no particular order) Asahi Kasei Corp., Toray Industries Inc., Sumitomo Chemical Co. Ltd, SK Innovation Co. Ltd, and Ube Industries Ltd, among others.

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