

Vinylene Carbonate Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Vinylene Carbonate Market Summary

Introduction

Vinylene carbonate (VC) is a critical organic compound used primarily as an electrolyte additive in lithium-ion batteries, enhancing battery performance by improving cycle life, stability, and safety. Synthesized from raw materials such as ethylene oxide, carbon dioxide, chlorine, and triethylamine, VC forms a stable solid electrolyte interphase (SEI) layer on battery anodes, reducing degradation and enabling high-performance energy storage. The market is driven by the rapid growth of the electric vehicle (EV) industry, increasing demand for consumer electronics, and the expansion of renewable energy storage systems. Production is concentrated in Asia Pacific, particularly China, due to its robust battery manufacturing ecosystem. Key players like Jiangsu HSC and Guangzhou Tinci Materials Technology are expanding capacities to meet rising demand. The market benefits from advancements in battery technology, with trends focusing on high-purity VC, eco-friendly production processes, and integration with next-generation batteries like solid-state systems. Applications are centered on lithium-ion battery electrolytes, with growing interest in high-voltage and high-capacity battery formulations. Challenges include high production costs, raw material supply constraints, and environmental concerns over chlorinated intermediates. Asia Pacific dominates demand due to its leadership in EV and battery production, while North America and Europe focus on high-value applications in automotive and energy storage.

Market Size and Growth Forecast

The global vinylene carbonate market is projected to reach USD 0.8–1.0 billion by 2025, with an estimated compound annual growth rate (CAGR) of 10%–12% through 2030. This growth is propelled by the surging demand for lithium-ion batteries in EVs, consumer electronics, and renewable energy storage, supported by capacity expansions in China and advancements in battery performance.

Regional Analysis

Asia Pacific is expected to lead the vinylene carbonate market with a growth rate of 11%–13%, driven by China, Japan, and South Korea. China dominates due to its massive battery manufacturing base, with companies like Jiangsu HSC and Guangzhou Tinci expanding VC production to 30,000 and 20,000 tons annually, respectively, by 2026. Japan's market, led by firms like Zhejiang Yongtai Technology, focuses on high-purity VC for advanced batteries, while South Korea's EV and electronics sectors drive demand for stable electrolytes.

North America follows with a growth rate of 9%–11%, led by the United States and Canada. The U.S. market is fueled by EV adoption and energy storage projects, with trends emphasizing sustainable battery materials. Canada's growing battery supply chain supports VC demand, particularly for automotive applications.

Europe, with a growth rate of 8.5%–10.5%, is driven by Germany, France, and the UK. Germany's automotive industry, a hub for EV production, demands high-performance VC, while France and the UK focus on renewable energy storage. EU regulations on battery sustainability drive innovation in eco-friendly VC production.

South America, with a growth rate of 7%–9%, sees demand in Brazil and Argentina, driven by EV market growth and electronics manufacturing. Brazil's automotive sector fuels VC adoption, though limited local production poses constraints.

The Middle East and Africa, with a growth rate of 6%–8%, are led by the UAE and South Africa. The UAE's renewable energy projects drive VC demand for energy storage, while South Africa's emerging EV market supports modest growth. Limited infrastructure hinders broader adoption.

Application Analysis

Lithium-ion Battery Electrolyte: Expected to grow at 10%–12%, this segment dominates due to VC's critical role in enhancing battery cycle life and safety. VC stabilizes the SEI

layer, enabling high-voltage and high-capacity batteries for EVs, consumer electronics, and grid storage. Trends include integration with solid-state batteries, high-nickel cathodes, and eco-friendly electrolyte formulations to reduce environmental impact.

Key Market Players

Rongcheng Qing Mu High-Tech Materials: A Chinese company, acquired by Shandong Genyuan in 2021, Rongcheng Qing Mu produces 1,300 tons of VC annually, focusing on lithium-ion battery electrolytes for EVs and electronics.

Jiangsu HSC: A Chinese manufacturer, Jiangsu HSC is expanding its VC capacity to 30,000 tons annually by 2026 through its subsidiary Xianghe New Energy, targeting high-performance battery applications.

Jiangsu Hicomer Chemical: A Chinese firm, Jiangsu Hicomer Chemical produces 10,000 tons of VC annually, supplying electrolytes for EV and consumer electronics batteries.

Suzhou Huayi New Energy Technology: A Chinese company, Suzhou Huayi operates a 10,000-ton VC facility since 2023, focusing on high-purity additives for lithium-ion batteries in automotive and energy storage.

Guangzhou Tinci Materials Technology: A Chinese manufacturer, Guangzhou Tinci, through its subsidiary Zhejiang Tianshuo, produces 3,000 tons of VC annually, with plans for a 20,000-ton facility by 2026, targeting EV and electronics markets.

Zhejiang Yongtai Technology: A Chinese firm, Zhejiang Yongtai produces 5,000 tons of VC annually since 2021 and plans a 25,000-ton facility, focusing on advanced battery electrolytes for global markets.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. The vinylene carbonate market has high barriers, including significant capital investment for production facilities and expertise in high-purity chemical synthesis. Established players like Jiangsu HSC and Guangzhou Tinci dominate, but new Chinese entrants with government support can emerge, slightly increasing the threat.

Threat of Substitutes: Low to Moderate. Alternatives like fluoroethylene carbonate

(FEC) compete with VC in battery electrolytes, but VC's superior SEI formation and compatibility with high-voltage batteries limit substitution. Emerging solid-state electrolytes pose a moderate long-term threat.

Bargaining Power of Buyers: Moderate. Battery manufacturers have some negotiating power due to multiple VC suppliers, particularly in China. However, the specialized nature of high-purity VC for advanced batteries limits switching options, balancing buyer power.

Bargaining Power of Suppliers: High. Suppliers of raw materials like ethylene oxide and chlorine, concentrated in a few regions, hold significant leverage due to supply chain complexity and high demand for chemical intermediates.

Competitive Rivalry: High. The market is highly competitive, with players like Jiangsu HSC, Guangzhou Tinci, and Zhejiang Yongtai competing on capacity, purity, and pricing. Chinese manufacturers intensify rivalry in cost-sensitive markets, while global players focus on high-value applications.

Market Opportunities and Challenges

Opportunities

Electric Vehicle Boom: The global surge in EV production, particularly in China and Europe, drives demand for VC in high-performance lithium-ion battery electrolytes, supporting market growth.

Renewable Energy Storage: Increasing adoption of lithium-ion batteries for grid storage in North America and the Middle East creates opportunities for VC in stable, long-life electrolytes.

Capacity Expansions: Investments by Chinese firms like Jiangsu HSC (30,000 tons by 2026), Guangzhou Tinci (20,000 tons by 2026), and Shandong Genyuan (200,000 tons by 2028) enhance supply to meet rising demand.

Sustainable Battery Trends: Growing focus on eco-friendly battery materials in Europe and North America supports innovation in low-impact VC production processes.

Emerging Market Growth: Rapid EV and electronics adoption in India, Brazil,

and the UAE offers potential for VC in cost-effective, high-performance battery applications.

Challenges

High Production Costs: Synthesizing high-purity VC involves complex processes and costly raw materials, limiting competitiveness in price-sensitive markets.

Raw Material Constraints: Dependency on concentrated suppliers of ethylene oxide and chlorine exposes the market to supply chain disruptions and price volatility.

Environmental Concerns: Chlorinated intermediates in VC production face scrutiny in Europe and North America, increasing compliance costs and pushing demand for greener alternatives.

Competition from Alternatives: Emerging electrolyte additives like FEC and solid-state battery technologies challenge VC's dominance, requiring continuous innovation.

Regulatory Pressures: Stringent regulations on chemical safety and emissions in Europe and China raise production costs and complexity for VC manufacturers.

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