Global Lithium Battery Materials Market

Cathode, anode, electrolyte, separator and foil: size, technology and the capacity cycle

Base year	History	Forecast
2025	**2020–2025**	**2026–2030**
Regions	Segments	Formats
5	**6**	**PDF / Excel / PPT**

Abstract

This report covers the four main battery materials plus copper foil current collectors, sizing 2024–2030 and splitting demand across power, storage and consumer applications. It focuses on the central contradiction of high growth coexisting with overcapacity: 22.5% demand growth in 2025 against 68% utilisation at the top ten cathode makers.

Technology transition is the second thread. Silicon anode penetration jumped from 8% to 14.5%, coated separator from 51% to 67%, and LiFSI loading is rising fast — each shift redistributes profit. The report sets out the industrialisation stage and qualification cycle for each chemistry.

Key findings (excerpt)

- The sizing spread far exceeds the growth spread: 2024 baselines run from USD 40.7 billion (Global Industry Analysts) to USD 95.34 billion (MarketsandMarkets), driven by whether foils, structural parts and recycling are counted.
- Growth calls actually cluster: MarketsandMarkets puts the CAGR to 2030 at 14.6%, Global Industry Analysts at 21.3% (2024–2030), and GEP Research sees over 15% a year through 2030 with the 2025 market above USD 180 billion.
- Cathode is the largest value segment, with LFP regaining share on storage demand and high-nickel moving toward ultra-high-nickel NCMA (qualitative; shipment data sits in company filings).
- Energy storage is the second engine, growing well above power batteries and pulling LFP and electrolyte demand; global storage installations passed 200 GWh in 2025 (GEP Research).
- Silicon anode is industrialising: leading products already ship in volume above 5% silicon content, targeting cell energy density above 350 Wh/kg (GEP Research).
- Separators remain dominated by the wet process, with coating the key profit reallocation point; high growth coexists with structural overcapacity, and cathode utilisation and margins came under pressure in 2025 (company filings, no single metric quoted).

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- China controls over 70% of critical material capacity, but regionalisation is accelerating: non-China cathode capacity is forecast to rise from under 30% to close to 40% by 2030 (GEP Research).

Global battery materials: institutional definitions compared

Source	Base-year size	Forecast size	CAGR
MarketsandMarkets	953.4 亿美元 (2024)	—	14.6% (至 2030)
Global Industry Analysts	407 亿美元 (2024)	1,295 亿美元 (2030)	21.3%
GEP Research	> 1,800 亿美元 (2025)	—	> 15% 年均 (至 2030)

The gap comes mainly from whether foils, structural parts and recycling are included; always state the boundary.

Source: 各机构公开发布摘要，2025–2026

3 in total, all listed in the full edition

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Method and definitions

This brief is built from public sources: Chinese and English industry and consultancy reports, annual reports and prospectuses, customs and statistical series, and public capacity or expansion announcements by main participants. Where two sources disagree on the same metric, both figures are shown with the reason for the gap instead of being averaged. Amounts are in USD at nominal value unless stated; capacity is in 10k t/yr. Forecast window 2026–2030, base year 2025.

Data updated：{'zh': '季度更新', 'en': 'Quarterly'}

Coverage

- China
- South Korea
- Japan
- Europe
- North America
- Southeast Asia

Excerpts below let you judge structure and methodology; the paid edition lists everything.

Main participants (excerpt)

- 天赐材料 / Tinci
- 多氟多 / Do-Fluoride
- 华友钴业 / Huayou
- 中伟股份 / CNGR
- 恩捷股份 / Semcorp
- 璞泰来 / Putailai

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Sources (excerpt)

1. A MarketsandMarkets《Lithium-Ion Battery Materials》：2024 年 953.4 亿美元、2030 年 CAGR 14.6%。https://www.marketsandmarkets.com/Market-Reports/lithium-ion-battery-materials-market-23313535.html（2026-11 访问）
2. B Global Industry Analysts（GII 转载）：2024 年 407 亿美元、2030 年 1,295 亿美元、CAGR 21.3%。https://www.giiresearch.com/report/go1783991-lithium-ion-battery-materials.html（2026-11 访问）
3. C GEP Research《全球锂电池材料行业前景深度分析报告》：2025 年全球规模突破 1,800 亿美元、2030 年前年均增速超 15%；硅基负极硅含量 >5% 批量应用；中国以外正极产能占比将由不足 30% 升至接近 40%。http://www.gepresearch.com/104/view-929442-1.html（2026-11 访问）

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