

France Electric Vehicle Battery Separator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The France Electric Vehicle Battery Separator Market size is estimated at USD 9.05 million in 2025, and is expected to reach USD 17.07 million by 2030, at a CAGR of 13.54% during the forecast period (2025-2030).

Key Highlights

- Over the medium period, the growing adoption of electric vehicles and the decreasing price of lithium-ion batteries is expected to drive the market in the forecast period.
- On the other hand, the demand-supply gap of raw materials are expected to restrain market growth during the forecast period.
- Nevertheless, the growing progress in developing and advanced battery technologies are likely to create opportunities for the France electric vehicle battery separator market.

France Electric Vehicle Battery Separator Market Trends

Lithium-ion Battery Segment to be the Fastest Growing

- Among various battery types, lithium-ion batteries (LIBs) are set to lead the France electric vehicle (EV) battery separator market during the forecast period. LIBs are outpacing other battery types, thanks to their superior capacity-to-weight ratio. Their rising adoption is further fueled by advantages like extended performance with minimal maintenance, a longer shelf life, and plummeting prices.
- When compared to lead-acid batteries, lithium-ion (Li-ion) batteries showcase numerous technical benefits. For instance, while

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lead-acid batteries offer a lifespan of about 400-500 cycles, rechargeable Li-ion batteries boast an impressive average of over 5,000 cycles. Moreover, Li-ion batteries outshine lead-acid ones in terms of maintenance frequency and voltage consistency throughout the discharge cycle, ensuring prolonged efficiency of electrical components.

- In recent years, major industry players have ramped up investments, focusing on economies of scale and R&D to boost battery performance. This surge in competition has led to a notable drop in lithium-ion battery prices. Thanks to technological advancements, manufacturing optimizations, and falling raw material costs, the volume-weighted average price of lithium-ion batteries saw a significant decline from USD 780/kWh in 2013 to USD 139/kWh in 2023. Projections suggest a further dip to around USD 113/kWh by 2025 and an ambitious target of USD 80/kWh by 2030. Such a downward trend in battery costs positions lithium-ion batteries as an increasingly attractive option.
- Historically, lithium-ion batteries found their primary application in consumer electronics like mobile phones and laptops. Yet, their role has evolved, and they are now the preferred power source for hybrids, the entire range of battery electric vehicles (BEVs), and battery energy storage systems (BESS) within the renewable energy sector.
- In May 2024, Verkor announced securing over EUR 1.3 billion in green financing, backed by 16 commercial banks and 3 public banks. These funds are earmarked for constructing Verkor's inaugural lithium-ion Gigafactory in Dunkirk, boasting an initial production capacity of 16 GWh/year. With this latest financing, Verkor's total secured funding for its battery gigafactory and the Verkor Innovation Centre surpasses EUR 3 billion. This substantial backing underscores banking partners' confidence in Verkor's mission to deliver low-carbon, high-performance batteries to Europe's automotive sector, bolstering the continent's industrial sovereignty in electric mobility and energy storage.
- In France, Automotive Energy Supply Corporation (AESC), a lithium-ion battery manufacturer for electric vehicles, is gearing up to launch a gigafactory in Douai, Hauts-de-France, by 2025. The factory's inaugural phase will cater to Renault's ECHO 5 and the 4Ever crossover utility vehicle, with a combined capacity of up to 9 Gigawatt-hours, sufficient to power 200,000 electric cars annually.
- Additionally, the plans for three expansions could see the facility's capacity soar to between 24 to 30 gigawatt-hours by 2030. The European Investment Bank is backing AESC with a direct loan of EUR 337.2 million and an additional EUR 112.8 million in indirect loans to commercial banks, a deal inked in September 2023. Such expansive lithium-ion battery manufacturing capabilities signal a burgeoning demand for battery components, notably lithium-ion battery separators, in the coming years.
- Given their lightweight nature, rapid charging, extended charging cycles, decreasing costs, and advancements in the industry, lithium-ion batteries are poised to be the fastest-growing segment in the France electric vehicle battery separator market during the forecast period.

Growing Adoption of Electric Vehicles to Drive the Market

- France's surging electric vehicle (EV) sales are propelling a heightened demand for EV battery materials, with separators taking center stage. As EV sales soar, local production and investments in these materials are on the rise, fortifying France's battery supply chain.
- France's dedication to clean energy and electric vehicles is intensifying its emphasis on battery components, notably separators. The International Energy Agency (IEA) highlighted this trend, noting that battery electric vehicle (BEV) sales in France reached around 310,000 units in 2023, a 47% leap from 210,000 units in 2022. This rapid surge in EV adoption signals a burgeoning demand for battery components, including separators.
- Moreover, in May 2024, the French government set an ambitious target for its carmakers: produce two million electric or hybrid vehicles by the decade's end. This comes amid stiff competition from China's dominant market. As part of a new medium-term planning agreement, the industry aims for an interim target of 800,000 electric vehicle sales by 2027, a significant leap from 200,000 in 2022. Furthermore, carmakers are setting their sights on boosting sales of electric light utility vehicles to 100,000 annually, up from just 16,500 in 2022.
- Additionally, government measures like subsidies, tax breaks, and stringent emissions regulations are energizing the EV market,

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subsequently heightening the demand for EV batteries and their components, such as separators. For instance, in 2024, the government allocated EUR 1.5 billion (USD 1.6 billion) across various programs to spur EV production and purchases. While nearly 20% of new cars sold in France are electric, only 12% of those are domestically produced. However, with these supportive measures, France is poised to bolster its EV battery manufacturing landscape, paving the way for heightened growth in the battery separator market.

- In May 2023, Stellantis, in partnership with TotalEnergies and Mercedes-Benz, celebrated the launch of the Automotive Cells Company's (ACC) battery gigafactory in Billy-Berclau Douvrin, France. This facility, the first of three planned in Europe, commenced with a production line capacity of 13 gigawatt-hours (GWh) and aims to scale up to 40 GWh by 2030. Targeting high-performance lithium-ion batteries with a reduced CO2 footprint, the gigafactory plays a pivotal role in Stellantis' ambition to escalate battery manufacturing capacity to 250 GWh in Europe by 2030. Such strides in battery production are set to bolster the battery separator sector.
- Moreover, France's dynamic EV market is catalyzing innovations in battery technology, especially in separators. Collaborations, like those between Arkema and ProLogium on advanced materials for next-gen lithium ceramic batteries, underscore the region's growing demand.
- Considering these dynamics, France is on the brink of a significant EV demand surge, which will inevitably amplify the need for EV battery separators in the foreseeable future.

France Electric Vehicle Battery Separator Industry Overview

The France rechargeable battery market is semi-consolidated. Some of the key players in the market (not in any particular order) include Sumitomo Chemical Co. Ltd, Mitsubishi Chemical Group Corporation, UBE Corporation, Daramic SAS and Delfortgroup AG.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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