

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

Market Report | 2025-04-28 | 115 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Germany Electric Vehicle Battery Separator Market size is estimated at USD 66.99 million in 2025, and is expected to reach USD 153.25 million by 2030, at a CAGR of 18% during the forecast period (2025-2030).

Key Highlights

- Over the medium term, the growing adoption of electric vehicles, the decreasing price of lithium-ion batteries, and the Government's push for Electric vehicles are expected to drive the Germany Electric Vehicle Battery Separator Market during the forecast period.
- On the other hand, the supply chain gap in battery materials, such as ingredient shortages or distribution bottlenecks, is expected to restrain Germany's Electric Vehicle Battery Separator Market growth in the future.
- Nevertheless, the increasing research and development of other battery chemistries like solid-state batteries, advanced lithium-ion chemistry, Sodium-ion batteries, etc, are expected to create an opportunity for the market in the future.

Germany Electric Vehicle Battery Separator Market Trends

Lithium-ion Battery Segment is Expected to Dominate the Market

- A battery separator, a porous membrane, is vital for lithium-ion batteries. It prevents electrical short circuits by isolating the cathode and anode, allowing only lithium ions to pass. Germany has been a pioneer in establishing a robust market for Li-ion Electric Vehicle battery separators.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Initially, in Germany, the lithium-ion battery industry primarily catered to the consumer electronics sector. However, over time, a pivotal shift took place. Electric vehicle (EV) manufacturers became the primary consumers of lithium-ion batteries, subsequently driving the demand for Li-ion battery separators. This shift was propelled by the rising sales of EVs, particularly Plug-in Hybrid Electric Vehicles (PHEVs), attributed to their high energy density, extended cycle life, and overall efficiency.
- Data from the International Energy Agency (IEA) indicates that in 2023, sales of Battery Electric Vehicles (BEVs) in Germany, predominantly utilizing Li-ion technology, reached 520,000, up from 470,000 in 2022. This marks a notable 10.6% growth in Li-ion technology EV sales, underscoring the segment's dominance in Germany's Electric Vehicle Battery Separator Market.
- In July 2024, Luxinar Ltd., a United Kingdom-based company with operations in Germany, showcased the advantages of laser cutting Li-ion battery separator foils at the Laser EMobility Workshop held in Munich, Germany, from July 17 to 18. During the conference, the company demonstrated its CO2 laser cutting technology for battery separators, emphasizing its potential to reduce wear and tear and revolutionize Li-ion electric vehicle battery cell production in Germany.
- According to the International Energy Agency (IEA), sales of Battery Electric Commercial Trucks in Germany, which are over 98% reliant on Li-ion technology and closely tied to the Electric Vehicle Battery Separator Market, surged from 1,100 in 2022 to 2,200 in 2023, effectively doubling in a year. This trend indicates a promising future for battery separators as EV truck sales continue to climb in Germany.
- Given the rising EV sales and advancements in Li-ion battery separator technology, the Li-ion segment is poised to dominate the Electric Vehicle Battery Separator Market in Germany.

Policies of the German Government Driving the Market

- Germany has enacted numerous legislations, policies, and acts to curb greenhouse gas (GHG) emissions and carbon dioxide output. Additionally, the country has rolled out various incentives for battery-electric vehicles, creating favorable conditions for manufacturers of EV batteries and related equipment.
- In 2022, the German Government committed to transitioning 100% of its civil government-operated fleets to zero-emission light-duty vehicles (LDVs). Furthermore, they aim for all medium and heavy-duty vehicles (M/HDVs) to be zero-emission by 2035. By 2030, Germany targets all new or replacement vehicles to adopt environmentally friendly technologies, with a minimum of 50% being electric by 2025. These initiatives are propelling the surge in EV production in Germany and boosting the demand for battery separators.
- The German Government has enacted a motor tax exemption for electric vehicles (EVs) that emit less than 50g of CO2/km or have a range of at least 60km (increasing to 80km from 2025) until 2030. Moreover, the government intends to offer electric cars special privileges on German roads, including access to bus lanes and exclusive parking spots.
- Due to supportive policies from the German Government, many players in the battery separator industry are collaborating to bolster manufacturing in Germany. For instance, in November 2023, Glatfelter Corporation, a global supplier of engineered materials with a significant presence in Germany, forged a strategic alliance with Safire Technology Group, Inc. This venture-backed firm specializes in advanced battery safety technologies. Together, they're developing a new battery separator tailored for Safire Group's SAFe Impact Resistant Electrolyte, catering to clients prioritizing enhanced performance and safety in their Lithium-ion (Li-ion) applications.
- The German government is also advocating for an increase in electric vehicle charging stations in the United Kingdom. Data from the International Energy Agency indicates that superfast EV charging points in the UK grew from 71,000 in 2022 to 87,000 in 2023. This expansion indirectly boosts the demand for the Electric Vehicle Battery Separator Market in Germany. As the network of charging stations expands, it bolsters the adoption of electric vehicles, subsequently driving up the demand for battery separators.
- Moreover, the German government is responding to the declining prices of Li-ion batteries in the market. In 2023, average battery pack prices for electric vehicles (EVs) fell to USD 139/kWh, a significant 13% drop from 2022. Projections estimate prices will further decline to USD 113/kWh by 2025 and reach USD 80/kWh by 2030. Such trends bolster the growth of the Electric

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Vehicle Battery Separator Market in Germany.

- In summary, the aforementioned points underscore the German Government's concerted efforts to amplify the share of electric vehicles, directly influencing the dynamics of the Electric Vehicle Battery Separator Market in the country.

Germany Electric Vehicle Battery Separator Industry Overview

The Germany Electric Vehicle Battery Separator Market is semi-consolidated. Some of the major players in the market (in no particular order) include Contemporary Amperex Technology Co., Limited, SK Innovation Co. Ltd., Asahi Kasei Corporation, Bruckner Maschinenbau GmbH, and Toray Industries Europe GmbH, among others.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Scope of the Study
- 1.2 Market Definition
- 1.3 Study Assumptions

2 EXECUTIVE SUMMARY

3 RESEARCH METHODOLOGY

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Size and Demand Forecast in USD, till 2029
- 4.3 Recent Trends and Developments
- 4.4 Government Policies and Regulations
- 4.5 Market Dynamics
 - 4.5.1 Drivers
 - 4.5.1.1 The Growing Adoption of Electric Vehicles
 - 4.5.1.2 Favorable Government Policies
 - 4.5.1.3 Decreasing Price of Lithium-ion Batteries
 - 4.5.2 Restraints
 - 4.5.2.1 The Supply Chain Gap
- 4.6 Supply Chain Analysis
- 4.7 PESTLE Analysis
- 4.8 Investment Analysis

5 MARKET SEGMENTATION

- 5.1 Battery Type
 - 5.1.1 Lithium-ion
 - 5.1.2 Lead-acid
 - 5.1.3 Other Battery Type

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.2 Material Type

5.2.1 Polypropylene

5.2.2 Polyethylene

5.2.3 Other Material Types

6 COMPETITIVE LANDSCAPE

6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements

6.2 Strategies Adopted by Leading Players

6.3 Company Profiles

6.3.1 Contemporary Amperex Technology Co.

6.3.2 SK Innovation Co. Ltd.

6.3.3 Asahi Kasei Corporation

6.3.4 Bruckner Maschinenbau GmbH

6.3.5 Coperion GmbH

6.3.6 Toray Industries Europe GmbH

6.3.7 Delfort Germany GmbH

6.3.8 SEMCORP Advanced Materials Group

6.3.9 Sepion Technologies

6.4 List of Other Prominent Companies

6.5 Market Ranking/Share (%) Analysis

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

7.1 Ongoing Research and Advancement in Li-ion Battery Separator Material

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2025-04-28 | 115 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

