

Middle East And Africa 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 Middle East And Africa Electric Vehicle Battery Separator Market size is estimated at USD 0.60 million in 2025, and is expected to reach USD 0.81 million by 2030, at a CAGR of 5.95% 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 in the region is expected to restrain market growth in the future.
- Nevertheless, the growing progress in emerging battery technologies is likely to create opportunities for the Middle East and Africa electric vehicle battery separator market.
- Among all the countries in the region, the United Arab Emirates is expected to have significant growth due to the increasing adoption of electric vehicles.

Middle East And Africa Electric Vehicle Battery Separator Market Trends

Lithium-ion Battery Segment to Witness Fastest Growth

- The electric vehicle (EV) battery separator market in the Middle East & Africa is poised for notable growth, spearheaded by the lithium-ion battery (LIB) segment. The rising popularity of lithium-ion batteries can be attributed to their superior capacity-to-weight ratio, enhanced performance, extended shelf life, and a consistent trend of decreasing prices.

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- When compared to lead-acid batteries, lithium-ion (Li-ion) batteries present significant technical advantages. They boast a lifespan averaging over 5,000 cycles, a stark contrast to the 400-500 cycles typical of lead-acid batteries. Furthermore, Li-ion batteries demand less frequent maintenance and replacements, and they maintain a consistent voltage throughout their discharge cycle-an essential feature for the efficient operation of electrical components.
- Key industry players are channeling substantial investments into R&D and operational expansions to further enhance performance. This surge in competition, combined with technological advancements and declining raw material costs, has driven a notable decrease in the volume-weighted average price of lithium-ion batteries. From USD 780/kWh in 2013, the price plummeted to USD 139/kWh in 2023. Projections suggest a further dip to around USD 113/kWh by 2025 and an ambitious USD 80/kWh by 2030. Such cost reductions bolster the appeal of lithium-ion batteries in the EV market, subsequently fueling the demand for EV battery separators.
- Historically linked to consumer electronics, lithium-ion batteries have seen a significant shift in application towards electric vehicles. While the Middle East and Africa are still in the nascent stages of developing their lithium-ion battery manufacturing capabilities-trailing behind global frontrunners like China, the United States, and Europe-nations like the United Arab Emirates and Saudi Arabia are making hefty investments in this domain. These strategic investments not only aim to diversify their economies but also seek to cater to the surging demand for electric vehicles, paving the way for a thriving market for battery materials, including EV battery separators.
- For instance, in a landmark move, Titan Lithium has teamed up with the Khalifa Economic Zones Abu Dhabi (KEZAD) Group to set up a cutting-edge lithium processing facility in Abu Dhabi. This AED 5 billion venture will see the establishment of a sprawling 290,000 square meter plant in KEZAD Al Mamourah, dedicated to producing vital battery-grade lithium carbonate and hydroxide for the EV sector. Such initiatives are poised to bolster the EV battery supply chain in the region, presenting lucrative opportunities for battery components like separators.
- Saudi Arabia is making strides in the global rechargeable battery arena. In June 2023, Obeikan Investment Group joined forces with Australian startup European Lithium to set up a lithium hydroxide refinery in the kingdom. Furthermore, Ma'aden, the state mining giant, has collaborated with US's Ivanhoe Electric to scout vast, under-explored territories in the Arabian Shield for lithium and other rare metals. These strategic moves are set to amplify the demand for EV battery separators as the region's Li-ion battery supply chain and manufacturing capabilities expand.
- Demonstrating its commitment, Saudi Arabia, in September 2023, saw Energy Capital Group, a local investment firm, partner with US tech startup Pure Lithium. Their joint venture focuses on developing batteries from lithium sourced from oilfield brines, backed by an initial USD 50 million investment. This initiative aims to cater to the surging demand for lithium-ion battery metals, further energizing the EV battery separator market. Moreover, the region's dedication to building a sustainable lithium-ion battery supply chain is underscored by its membership in the Global Battery Alliance, signaling a robust growth trajectory for EV battery separators.
- In a bid to fortify Africa's lithium-ion battery supply chains, METALS refining and recycling firm ReElement Technologies inked an MoU with Afrivolt in February 2024. This partnership seeks to craft a closed-loop lithium battery and electric vehicle manufacturing ecosystem in Africa, emphasizing locally sourced critical minerals refined by ReElement Technologies Africa and its subsidiaries. Such an ecosystem is poised to bolster the growth of lithium-ion battery components, including separators, in the foreseeable future.
- Afrivolt, previously known as Aqora, is spearheading the establishment of a lithium-ion cell gigafactory within this ecosystem. The MoU with ReElement Technologies is anticipated to transition into a robust offtake agreement, ensuring sustained support for the operations of African gigafactories. These initiatives, coupled with efforts to nurture a local talent pool, are set to propel the lithium-ion battery industry in the region.
- Given these dynamic developments, the lithium-ion battery segment is on track to emerge as the dominant player in the Middle East and Africa's EV battery manufacturing landscape, heralding a thriving market for EV battery separators in the years to come.

United Arab Emirates to Witness Significant Growth

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- The United Arab Emirates (UAE) is on track for significant growth in its electric vehicle (EV) battery industry, encompassing essential materials like separators. Rapid industrialization, a surge in EV adoption, and the UAE's strategic economic positioning are setting the stage for robust battery adoption and innovation.
- EV adoption in the UAE has seen a sharp uptick in recent years. In 2023, the country recorded around 28,900 electric vehicle sales, a notable rise from approximately 18,900 in 2022, as reported by the International Energy Agency (IEA). This upward trend, combined with the UAE's ambitious target of having electric and hybrid vehicles make up 50% of its total vehicles by 2050, is set to fuel the demand for EV batteries, especially critical separator materials.
- In line with its sustainability goals, the UAE is making substantial investments in EV infrastructure and championing EV adoption. These efforts aim to combat climate change and lessen dependence on fossil fuels. Consequently, there's a rising demand for high-capacity, durable EV batteries, which subsequently boosts the need for efficient battery separators.
- Moreover, technological advancements in batteries, especially the emergence of solid-state batteries, are elevating the efficiency, safety, and overall performance of EV batteries. A case in point: In April 2024, US-based Statevolt unveiled plans for a USD 3.2 billion gigafactory in Ras Al Khaimah, targeting an annual output of up to 40 gigawatt-hours. This strategic move is designed to serve the burgeoning battery storage and electric mobility markets spanning the Middle East, Africa, and India, thereby opening new avenues for EV battery separator manufacturers.
- The UAE's commitment to EV manufacturing is further underscored by M Glory Holding Group's announcement in early 2022. They plan to inaugurate a sizable EV manufacturing facility in Dubai Industrial City. With a hefty investment of AED 1.5 billion, this 93,000 square meter plant aims for an annual output of 55,000 EVs, amplifying the demand for both EV batteries and their separators.
- These strategic moves position the UAE as a pivotal player in the burgeoning EV battery manufacturing landscape of the Middle East and Africa, highlighting the crucial role of EV battery separators.

Middle East And Africa Electric Vehicle Battery Separator Industry Overview

The Middle East And Africa electric vehicle battery separator market is semi-consolidated. Some of the key players in the market (not in any particular order) include Entek International LLC, Toray International Inc., Sinoma Science & Technology Co., Ltd., UBE Corporation, and Sumitomo Chemical Co., Ltd.

Additional Benefits:

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

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