

## **China Battery Market Forecast 2025-2032**

Market Report | 2025-11-17 | 138 pages | Inkwood Research

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### **Report description:**

#### **KEY FINDINGS**

The China battery market size is valued at \$49.66 billion as of 2025 and is expected to reach \$144.78 billion by 2032, progressing with a CAGR of 16.52% during the forecast period, 2025-2032.

China's battery market is surging ahead, fueled by the world's most ambitious electrification agenda and unmatched manufacturing scale. Strong government incentives under the New Energy Vehicle (NEV) policy are propelling EV battery demand to record heights, with subsidies and tax exemptions making electric vehicles increasingly affordable for consumers. According to the Ministry of Industry and Information Technology, NEV sales exceeded 9 million units in 2024, representing a penetration rate above 30%.

#### **MARKET INSIGHTS**

Simultaneously, renewable energy adoption is accelerating dramatically, with wind and solar installations requiring massive grid-scale storage solutions to balance intermittent generation. China leads global battery production capacity, accounting for approximately 80% of lithium-ion cell manufacturing worldwide. Furthermore, technological advancement in LFP and emerging solid-state battery technologies is improving cost efficiency while reducing dependence on scarce materials like cobalt. Vertical integration among domestic manufacturers strengthens supply chain resilience, positioning Chinese companies to dominate both domestic and export markets through 2032.

CATL (Contemporary Amperex Technology Co. Limited) represents a global leader in battery cell manufacturing, commanding the largest market share worldwide. Headquartered in Ningde, Fujian Province, CATL supplies virtually every major automotive manufacturer globally, including Tesla, BMW, Volkswagen, and Toyota. The company's product portfolio spans diverse chemistries, from high-nickel NMC for premium applications to cost-effective LFP batteries for mainstream vehicles. CATL pioneered cell-to-pack technology, which eliminates traditional battery modules to increase volumetric efficiency and reduce system costs. Moreover, the company operates massive gigafactories across China, with international facilities under construction in Germany, Hungary, and the United States.

Sodium-ion batteries are emerging as a transformative technology with tremendous potential for large-scale stationary storage and cost-sensitive vehicle applications. CATL launched the first-generation sodium-ion battery in 2021, achieving energy densities approaching 160 Wh/kg while eliminating lithium dependence entirely. Consequently, sodium-ion technology addresses critical supply chain vulnerabilities, as sodium represents one of the most abundant elements on Earth.

Manufacturing processes largely mirror lithium-ion production, enabling existing facilities to adapt with minimal capital

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investment. Moreover, sodium-ion batteries deliver superior low-temperature performance, maintaining functionality in extreme cold where lithium-ion systems struggle. Fast-charging capabilities outperform LFP batteries, with the potential to reach 80% capacity in just 15 minutes. However, lower energy density currently limits sodium-ion adoption in passenger vehicles, making the technology more suitable for urban electric vehicles, two-wheelers, and energy storage systems.

Chinese manufacturers are accelerating sodium-ion commercialization, with multiple companies announcing production capacity expansions through 2025. HiNa Battery Technology has established pilot production lines in Shanxi Province, targeting grid-scale storage applications. Meanwhile, China's National Development and Reform Commission includes sodium-ion batteries in strategic emerging industry plans, signaling government support for technology development.

Industrial applications show particular promise, with forklifts, mining equipment, and port machinery representing ideal early adoption opportunities. Electric bicycles and scooters, which dominate Chinese urban mobility, could transition to sodium-ion power systems to reduce costs and improve sustainability. Nevertheless, energy density improvements remain essential for broader market acceptance, with researchers targeting 200 Wh/kg to compete effectively with LFP alternatives across diverse applications.

#### SEGMENTATION ANALYSIS

The China battery market is segmented into aerospace, automobile, consumer electronics, grid-scale energy storage, telecom, power tools, military & defense, and other end uses. The automobile segment is further categorized into ICE engines and electric vehicles. The ICE engines segment is divided into passenger vehicles and commercial vehicles, while the electric vehicles segment includes e-bikes, e-cars, e-buses, and e-trucks.

Grid-scale energy storage is experiencing explosive growth as China pursues ambitious renewable energy targets and grid modernization initiatives. The country aims to install over 400 GW of new renewable capacity by 2030, requiring proportional investment in storage infrastructure to manage intermittent generation. Battery energy storage systems enable frequency regulation, peak shaving, and renewable integration, fundamentally transforming grid operations.

Provincial governments mandate storage installations alongside new wind and solar projects, creating guaranteed demand for multi-megawatt battery systems. Additionally, independent storage power stations are emerging as standalone businesses, buying electricity during low-price periods and selling during peak demand windows. According to China's National Energy Administration, grid-scale battery storage installations exceeded 30 GW in 2024, with projections indicating 100 GW by 2030. Technological innovation is driving grid-scale storage economics toward profitability, with system costs declining rapidly through manufacturing scale and technological improvements. LFP batteries dominate this segment due to superior cycle life, safety characteristics, and cost advantages over alternative chemistries. Leading players like BYD and CATL offer complete turnkey solutions, including cells, battery management systems, thermal management, and grid integration capabilities. Flow batteries are gaining traction for ultra-long-duration storage applications, with vanadium redox flow batteries deployed in pilot projects across multiple provinces.

Meanwhile, retired EV batteries find second-life applications in stationary storage, with companies establishing cascaded utilization programs that extend battery economic life. Safety regulations continue evolving, with stringent fire prevention and emergency response requirements following several high-profile incidents. Consequently, advanced thermal management systems, early warning algorithms, and fire suppression technologies become critical differentiators for grid-scale storage providers competing in this rapidly expanding market segment.

#### COMPETITIVE INSIGHTS

Some of the top players operating in the China battery market include A123 Systems LLC, Duracell, Exide Technologies, Johnson Controls Inc, etc.

Johnson Controls Inc operates as a diversified industrial conglomerate with a significant presence in advanced energy storage and automotive battery solutions globally. Headquartered in Cork, Ireland, the company serves automotive, commercial, and residential markets through its Power Solutions division. Johnson Controls produces starting, lighting, and ignition (SLI) batteries for conventional vehicles under well-known brands including VARTA, LTH, and Optima.

The company maintains extensive manufacturing operations across China, supplying both domestic automakers and international brands with lead-acid batteries. Beyond traditional automotive applications, Johnson Controls develops lithium-ion battery systems for hybrid and electric vehicles through strategic partnerships. Manufacturing facilities in Chongqing and Shanghai serve the

rapidly growing Chinese EV market with advanced battery technologies.

Furthermore, the company invests heavily in battery recycling infrastructure, operating closed-loop systems that recover lead and other materials from end-of-life batteries. This circular economy approach aligns with China's environmental regulations while ensuring sustainable raw material supplies. Johnson Controls leverages decades of automotive expertise to navigate China's complex regulatory environment and competitive landscape effectively.

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