

Europe Battery Market Forecast 2025-2032

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Report description:

KEY FINDINGS

The Europe battery market size is valued at \$31.27 billion as of 2025 and is expected to reach \$92.30 billion by 2032, progressing with a CAGR of 16.72% during the forecast years, 2025-2032.

Europe's battery market experiences transformative growth driven by stringent emissions regulations and accelerating electric vehicle adoption. The European Alternative Fuels Observatory reports that battery electric vehicle registrations surged 34% in the first half of 2025 compared to 2024. Regulatory frameworks, including CO2 emission targets and zero-emission vehicle mandates, catalyze this expansion.

MARKET INSIGHTS

According to the European Automobile Manufacturers' Association, battery-electric vehicles captured 15.8% market share through August 2025, up from 12.6% the previous year. Gigafactory construction accelerates across the continent as manufacturers establish local production capabilities.

However, the International Energy Agency notes that European battery demand stalled in 2024, contrasting sharply with growth in the United States and China. Korean manufacturers face market share pressure, declining from 80% in 2022 to 60% in 2024 as Chinese producers gain ground through lithium iron phosphate chemistry advantages. Grid-scale energy storage deployment intensifies to manage renewable energy integration challenges.

REGIONAL ANALYSIS

The Europe battery market growth assessment includes the analysis of the United Kingdom, Germany, France, Italy, Spain, Belgium, Poland, and Rest of Europe.

The United Kingdom leads European markets through aggressive zero-emission vehicle mandates and strategic policy frameworks. The UK government implemented the ZEV mandate requiring 22% of new cars sold in 2024 to be zero-emission, rising annually to 100% by 2035. This regulatory certainty drives remarkable results. According to the International Council on Clean Transportation, the UK achieved 19% battery electric vehicle market share in 2024, overtaking Germany despite having a smaller overall car market.

The Society of Motor Manufacturers and Traders confirms that electric vehicles represented 19.6% of new car sales in 2024, with momentum continuing into 2025. Charging infrastructure expands rapidly, surpassing 82,000 public stations. Manufacturing investments follow, with major announcements from Nissan, BMW, and Tata securing battery production capabilities. Nevertheless, challenges persist, including consumer affordability concerns and infrastructure gaps in rural areas. Tax policy shifts

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also introduced vehicle excise duty for electric vehicles starting April 2025, removing previous exemptions.

Further, policy certainty proves critical for sustained growth. Trading schemes enable manufacturers to bank compliance credits when exceeding targets, providing flexibility during market fluctuations. Borrowing provisions allow up to 75% of annual targets in early years, declining to 25% by 2026, and major automakers commit billions to UK operations, recognizing regulatory stability and market potential.

In this regard, BMW announced over £600 million investment in its Oxford plant transformation, while Tata committed £4 billion for gigafactory construction. Similarly, Nissan and AESC pledged £1 billion for their Sunderland EV manufacturing hub. These strategic investments position the United Kingdom as Europe's leading electric vehicle market despite broader economic uncertainties.

Furthermore, expanding charging networks addresses range anxiety concerns, particularly along motorways and in urban centers, as private sector confidence remains strong given long-term policy commitments extending through 2035.

Germany maintains its position as Europe's largest battery electric vehicle market through manufacturing prowess and substantial infrastructure investments. Reports assert that German EV sales increased 39.2% for January through August 2025. Multiple gigafactory projects advance across the country; Swedish manufacturer Northvolt secured EUR902 million in German state aid for its 60 GWh Northvolt Drei facility in Heide, Schleswig-Holstein. Volkswagen partners with Northvolt on battery cell production in Salzgitter, targeting 40 GWh capacity by 2025.

On the other hand, Automotive Cells Company plans facilities in Kaiserslautern with 24 GWh capacity, though timeline adjustments reflect market dynamics. Chinese manufacturer CATL operates in Erfurt, though expansion plans face delays. Tesla's Grunheide facility represents another significant investment in German battery manufacturing capabilities. These developments strengthen Germany's automotive supply chain resilience and reduce import dependencies.

France accelerates battery production through substantial public and private investments targeting domestic manufacturing capabilities. Verkor secured EUR1.3 billion in green financing for its Dunkirk gigafactory with 16 GWh initial capacity, operational in 2025. The European Investment Bank contributed EUR400 million to this project alone. ACC, the Franco-German consortium comprising Stellantis, Mercedes, and TotalEnergies, develops production in Douvrin with 24 GWh planned capacity. ProLogium, a Taiwanese solid-state battery specialist, selected Hauts-de-France for its first international manufacturing plant with 48 GWh projected capacity starting in 2026.

Additionally, the European Commission allocated EUR2.9 billion to France specifically for ramping battery production alongside renewable energy equipment. These strategic investments position France as a crucial battery manufacturing hub. Renault Group benefits directly from domestic supply chain development, securing batteries from Verkor and other regional producers. Government support through subsidies and infrastructure development accelerates this industrial transformation across French regions.

SEGMENTATION ANALYSIS

The Europe battery market by end use 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.

Electric vehicles are set to play a pivotal role in the automobile segment through unprecedented adoption rates and comprehensive model availability. Battery electric vehicles captured growing market share across all major European markets throughout 2024 and 2025. This dominance stems from several converging factors, including consumer preference increasingly favoring zero-emission vehicles over hybrid alternatives. Government policies also provide favorable incentives and regulatory certainty extending through 2035. Major automotive manufacturers expand their BEV product portfolios dramatically, introducing models across all price segments and vehicle categories.

Technological improvements deliver enhanced energy density and faster charging capabilities, addressing previous range anxiety concerns. Battery costs decline significantly, improving affordability and accelerating mainstream adoption. The expanding charging infrastructure network across European countries reduces practical barriers to ownership. Germany leads in absolute volume, while smaller markets like Norway and the Netherlands achieve higher penetration rates exceeding 20%.

Commercial vehicle electrification emerges as the fastest-growing subsegment within automobiles. Medium and heavy-duty trucks project approximately 44% compound annual growth from 2024 through 2029. Fleet operators transition to electric trucks driven by lower operational costs and stricter emission regulations. Technological advancements in high-capacity battery systems

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specifically designed for heavy-duty applications enable longer ranges and practical payload capabilities. Additionally, government initiatives promoting zero-emission commercial vehicles accelerate adoption timelines.

COMPETITIVE INSIGHTS

Some of the top players operating in the Europe battery market include Samsung SDI, Panasonic Corporation, LG Energy Solution, Saft Groupe, etc.

Samsung SDI operates extensive battery manufacturing facilities across Europe through strategic investments and partnerships with major automotive customers. The South Korean battery giant established significant production capacity in God, Hungary, beginning operations in 2016 after converting previous display manufacturing facilities. Samsung SDI invested approximately \$994 million through 2030 to expand Hungarian operations, targeting 18 million cells monthly production across two plants. The company supplies lithium-ion batteries to prestigious European automakers, including BMW, Volkswagen, and Volvo, strengthening relationships through reliable delivery and technological innovation. Samsung SDI produces both NMC and NCA chemistry batteries at its European facilities, offering Gen5 batteries with over 600-kilometer range capabilities. Additionally, the company operates a development and testing center in Kalsdorf, Austria, focused on battery pack engineering for hybrid and fully electric vehicle applications. This facility provides comprehensive services from initial development through industrialization and quality testing, supporting customer-specific requirements.

Samsung SDI's product portfolio encompasses prismatic and cylindrical cell formats, including advanced 46-series batteries entering production in 2025. The company's European presence positions it strategically to serve growing regional demand while maintaining technological leadership through continuous innovation in energy density, charging speed, and safety performance characteristics.

Table of Contents:

- 1. RESEARCH SCOPE & METHODOLOGY
 - 1.1. STUDY OBJECTIVES
 - 1.2. METHODOLOGY
 - 1.3. ASSUMPTIONS & LIMITATIONS
- 2. EXECUTIVE SUMMARY
 - 2.1. MARKET SIZE & FORECAST
 - 2.2. MARKET OVERVIEW
 - 2.3. SCOPE OF STUDY
 - 2.4. CRISIS SCENARIO ANALYSIS
 - 2.5. MAJOR MARKET FINDINGS
 - 2.5.1. THE BATTERY MARKET IS EXPERIENCING UNPRECEDENTED GROWTH DRIVEN BY ELECTRIC VEHICLE ADOPTION AND RENEWABLE ENERGY STORAGE DEMAND
 - 2.5.2. LITHIUM-ION BATTERIES REPRESENT THE DOMINANT TECHNOLOGY SEGMENT ACROSS AUTOMOTIVE AND CONSUMER ELECTRONICS APPLICATIONS WITH STRONG MARKET LEADERSHIP
 - 2.5.3. LFP BATTERIES ARE RAPIDLY GAINING MARKET SHARE DUE TO COST ADVANTAGES AND REDUCED DEPENDENCE ON SCARCE CRITICAL MINERALS
- 3. MARKET DYNAMICS
 - 3.1. KEY DRIVERS
 - 3.1.1. ELECTRIC VEHICLE ADOPTION SURGE IS THE PRIMARY MARKET CATALYST WITH GOVERNMENTS WORLDWIDE IMPLEMENTING AGGRESSIVE ELECTRIFICATION MANDATES AND INCENTIVES
 - 3.1.2. RENEWABLE ENERGY INTEGRATION REQUIRES MASSIVE GRID-SCALE STORAGE SOLUTIONS FOR MANAGING INTERMITTENT SOLAR AND WIND POWER GENERATION
 - 3.1.3. CONSUMER ELECTRONICS PROLIFERATION, INCLUDING SMARTPHONES, LAPTOPS, WEARABLES, AND IOT DEVICES, CONTINUALLY DRIVES PORTABLE POWER DEMAND
 - 3.1.4. GOVERNMENT POLICIES SUPPORTING CLEAN ENERGY TRANSITION THROUGH TAX CREDIT SUBSIDIES AND STRINGENT CARBON EMISSION REGULATIONS

3.2. KEY RESTRAINTS

3.2.1. CRITICAL MINERAL SUPPLY CHAIN CONCENTRATION CREATES SIGNIFICANT VULNERABILITY WITH HEAVY DEPENDENCE ON SINGLE-SOURCE COUNTRIES FOR LITHIUM, COBALT, AND NICKEL

3.2.2. HIGH MANUFACTURING COSTS OUTSIDE CHINA LIMIT COMPETITIVE EXPANSION WITH PRODUCTION EXPENSES SIGNIFICANTLY HIGHER IN EUROPE AND NORTH AMERICA

3.2.3. GEOPOLITICAL TENSIONS AND TRADE BARRIERS CREATE SUPPLY CHAIN DISRUPTIONS, INCLUDING TARIFFS AND EXPORT RESTRICTIONS ON BATTERY MATERIALS AND COMPONENTS

3.2.4. SOLID-STATE BATTERY COMMERCIALIZATION FACES PERSISTENT TECHNICAL CHALLENGES, INCLUDING SCALING DIFFICULTIES AND MANUFACTURING YIELD ISSUES

4. KEY ANALYTICS

4.1. KEY MARKET TRENDS

4.1.1. SOLID-STATE BATTERY DEVELOPMENT IS ACCELERATING WITH MAJOR AUTOMAKERS TARGETING NEAR-TERM COMMERCIAL PRODUCTION FOR ENHANCED SAFETY AND PERFORMANCE

4.1.2. LFP BATTERY TECHNOLOGY IS EXPANDING FROM CHINA TO GLOBAL MARKETS DUE TO COST COMPETITIVENESS AND ELIMINATION OF COBALT DEPENDENCY

4.1.3. BATTERY RECYCLING AND CIRCULAR ECONOMY INITIATIVES ARE GAINING MOMENTUM TO REDUCE PRIMARY RAW MATERIAL DEPENDENCE AND ENVIRONMENTAL IMPACT

4.1.4. REGIONAL GIGAFACTORY PROLIFERATION IS ACCELERATING WORLDWIDE AS COMPANIES ESTABLISH LOCAL MANUFACTURING TO SERVE GROWING DOMESTIC MARKETS

4.2. PORTER'S FIVE FORCES ANALYSIS

4.2.1. BUYERS POWER

4.2.2. SUPPLIERS POWER

4.2.3. SUBSTITUTION

4.2.4. NEW ENTRANTS

4.2.5. INDUSTRY RIVALRY

4.3. GROWTH PROSPECT MAPPING

4.3.1. GROWTH PROSPECT MAPPING FOR EUROPE

4.4. MARKET MATURITY ANALYSIS

4.5. MARKET CONCENTRATION ANALYSIS

4.6. VALUE CHAIN ANALYSIS

4.6.1. RAW MATERIALS

4.6.2. MINERAL PROCESSING

4.6.3. CATHODE MANUFACTURING

4.6.4. ANODE PRODUCTION

4.6.5. CELL ASSEMBLY

4.6.6. PACK INTEGRATION

4.7. KEY BUYING CRITERIA

4.7.1. ENERGY DENSITY

4.7.2. COST EFFECTIVENESS

4.7.3. SAFETY PERFORMANCE

4.7.4. CYCLE LIFE

4.8. REGULATORY FRAMEWORK

5. BATTERY MARKET BY MATERIAL

5.1. LEAD ACID

5.1.1. SLI

5.1.2. STATIONARY

5.1.3. MOTIVE

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- 5.2. LITHIUM ION
- 5.3. NICKEL-BASED
- 5.4. SODIUM-ION
- 5.5. FLOW BATTERY
- 5.6. SMALL SEALED LEAD-ACID BATTERIES
- 5.7. OTHER MATERIALS
- 6. □ BATTERY MARKET BY END USE
 - 6.1. AEROSPACE
 - 6.2. AUTOMOBILE
 - 6.2.1. ICE ENGINES
 - 6.2.1.1. PASSENGER VEHICLES
 - 6.2.1.2. COMMERCIAL VEHICLES
 - 6.2.2. ELECTRIC VEHICLES
 - 6.2.2.1. E-BIKES
 - 6.2.2.2. E-CARS
 - 6.2.2.3. E-BUSES
 - 6.2.2.4. E-TRUCKS
 - 6.3. CONSUMER ELECTRONICS
 - 6.4. GRID-SCALE ENERGY STORAGE
 - 6.5. TELECOM
 - 6.6. POWER TOOLS
 - 6.7. MILITARY & DEFENSE
 - 6.8. OTHER END USES
- 7. □ BATTERY MARKET BY APPLICATION
 - 7.1. AUTOMOTIVE BATTERIES
 - 7.2. PORTABLE BATTERIES
- 8. □ GEOGRAPHICAL ANALYSIS
 - 8.1. EUROPE
 - 8.1.1. MARKET SIZE & ESTIMATES
 - 8.1.2. EUROPE MARKET DRIVERS
 - 8.1.3. EUROPE BATTERY MARKET CHALLENGES
 - 8.1.4. KEY PLAYERS IN EUROPE BATTERY MARKET
 - 8.1.5. COUNTRY ANALYSIS
 - 8.1.5.1. GERMANY
 - 8.1.5.1.1. GERMANY MARKET SIZE & OPPORTUNITIES
 - 8.1.5.2. UNITED KINGDOM
 - 8.1.5.2.1. UNITED KINGDOM MARKET SIZE & OPPORTUNITIES
 - 8.1.5.3. FRANCE
 - 8.1.5.3.1. FRANCE MARKET SIZE & OPPORTUNITIES
 - 8.1.5.4. ITALY
 - 8.1.5.4.1. ITALY MARKET SIZE & OPPORTUNITIES
 - 8.1.5.5. SPAIN
 - 8.1.5.5.1. SPAIN MARKET SIZE & OPPORTUNITIES
 - 8.1.5.6. BELGIUM
 - 8.1.5.6.1. BELGIUM MARKET SIZE & OPPORTUNITIES
 - 8.1.5.7. POLAND
 - 8.1.5.7.1. POLAND MARKET SIZE & OPPORTUNITIES

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- 8.1.5.8. REST OF EUROPE
 - 8.1.5.8.1. REST OF EUROPE MARKET SIZE & OPPORTUNITIES
- 9. □COMPETITIVE LANDSCAPE
 - 9.1. KEY STRATEGIC DEVELOPMENTS
 - 9.1.1. MERGERS & ACQUISITIONS
 - 9.1.2. PRODUCT LAUNCHES & DEVELOPMENTS
 - 9.1.3. PARTNERSHIPS & AGREEMENTS
 - 9.1.4. BUSINESS EXPANSIONS & DIVESTITURES
 - 9.2. COMPANY PROFILES
 - 9.2.1. A123 SYSTEMS LLC □
 - 9.2.1.1. COMPANY OVERVIEW
 - 9.2.1.2. PRODUCTS
 - 9.2.1.3. STRENGTHS & CHALLENGES
 - 9.2.2. BYD COMPANY LTD
 - 9.2.2.1. COMPANY OVERVIEW
 - 9.2.2.2. PRODUCTS
 - 9.2.2.3. STRENGTHS & CHALLENGES
 - 9.2.3. C&D TECHNOLOGIES INC
 - 9.2.3.1. COMPANY OVERVIEW
 - 9.2.3.2. PRODUCTS
 - 9.2.3.3. STRENGTHS & CHALLENGES
 - 9.2.4. CROWN BATTERY MANUFACTURING COMPANY
 - 9.2.4.1. COMPANY OVERVIEW
 - 9.2.4.2. PRODUCTS
 - 9.2.4.3. STRENGTHS & CHALLENGES
 - 9.2.5. DURACELL
 - 9.2.5.1. COMPANY OVERVIEW
 - 9.2.5.2. PRODUCTS
 - 9.2.5.3. STRENGTHS & CHALLENGES
 - 9.2.6. EAST PENN MANUFACTURING CO
 - 9.2.6.1. COMPANY OVERVIEW
 - 9.2.6.2. PRODUCTS
 - 9.2.6.3. STRENGTHS & CHALLENGES □
 - 9.2.7. ENERSYS
 - 9.2.7.1. COMPANY OVERVIEW
 - 9.2.7.2. PRODUCTS
 - 9.2.7.3. STRENGTHS & CHALLENGES
 - 9.2.8. EVEREADY INDUSTRIES
 - 9.2.8.1. COMPANY OVERVIEW
 - 9.2.8.2. PRODUCTS
 - 9.2.8.3. STRENGTHS & CHALLENGES
 - 9.2.9. EXIDE TECHNOLOGIES
 - 9.2.9.1. COMPANY OVERVIEW
 - 9.2.9.2. PRODUCTS
 - 9.2.9.3. STRENGTHS & CHALLENGES □
 - 9.2.10. GS YUASA INTERNATIONAL LTD
 - 9.2.10.1. COMPANY OVERVIEW

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- 9.2.10.2. PRODUCTS
- 9.2.10.3. STRENGTHS & CHALLENGES
- 9.2.11. JOHNSON CONTROLS INC
- 9.2.11.1. COMPANY OVERVIEW
- 9.2.11.2. PRODUCTS
- 9.2.11.3. STRENGTHS & CHALLENGES
- 9.2.12. LG CHEM LTD
- 9.2.12.1. COMPANY OVERVIEW
- 9.2.12.2. PRODUCTS
- 9.2.12.3. STRENGTHS & CHALLENGES
- 9.2.13. PANASONIC CORPORATION
- 9.2.13.1. COMPANY OVERVIEW
- 9.2.13.2. PRODUCTS
- 9.2.13.3. STRENGTHS & CHALLENGES
- 9.2.14. SAMSUNG SDI CO LTD
- 9.2.14.1. COMPANY OVERVIEW
- 9.2.14.2. PRODUCTS
- 9.2.14.3. STRENGTHS & CHALLENGES
- 9.2.15. SAFT GROUPE SA
- 9.2.15.1. COMPANY OVERVIEW
- 9.2.15.2. PRODUCTS
- 9.2.15.3. STRENGTHS & CHALLENGES

LIST OF TABLES

- TABLE 1: MARKET SNAPSHOT - BATTERY
- TABLE 2: MARKET BY MATERIAL, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 3: MARKET BY MATERIAL, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 4: MARKET BY LEAD ACID, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 5: MARKET BY LEAD ACID, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 6: MARKET BY END USE, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 7: MARKET BY END USE, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 8: MARKET BY AUTOMOBILE, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 9: MARKET BY AUTOMOBILE, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 10: MARKET BY ICE ENGINES, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 11: MARKET BY ICE ENGINES, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 12: MARKET BY ELECTRIC VEHICLES, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 13: MARKET BY ELECTRIC VEHICLES, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 14: MARKET BY APPLICATION, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 15: MARKET BY APPLICATION, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 16: EUROPE MARKET, COUNTRY ANALYSIS, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)
- TABLE 17: EUROPE MARKET, COUNTRY ANALYSIS, FORECAST YEARS, 2025-2032 (IN \$ MILLION)
- TABLE 18: KEY PLAYERS OPERATING IN THE EUROPEAN MARKET
- TABLE 19: LIST OF MERGERS & ACQUISITIONS
- TABLE 20: LIST OF PRODUCT LAUNCHES & DEVELOPMENTS
- TABLE 21: LIST OF PARTNERSHIPS & AGREEMENTS
- TABLE 22: LIST OF BUSINESS EXPANSIONS & DIVESTITURES

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LIST OF FIGURES

FIGURE 1: KEY MARKET TRENDS

FIGURE 2: PORTER'S FIVE FORCES ANALYSIS

FIGURE 3: GROWTH PROSPECT MAPPING FOR EUROPE

FIGURE 4: MARKET MATURITY ANALYSIS

FIGURE 5: MARKET CONCENTRATION ANALYSIS

FIGURE 6: VALUE CHAIN ANALYSIS

FIGURE 7: KEY BUYING CRITERIA

FIGURE 8: SEGMENT GROWTH POTENTIAL, BY MATERIAL, IN 2024

FIGURE 9: LEAD ACID MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 10: SEGMENT GROWTH POTENTIAL, BY LEAD ACID, IN 2024

FIGURE 11: SLI MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 12: STATIONARY MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 13: MOTIVE MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 14: LITHIUM ION MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 15: NICKEL-BASED MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 16: SODIUM-ION MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 17: FLOW BATTERY MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 18: SMALL SEALED LEAD-ACID BATTERIES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 19: OTHER MATERIALS MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 20: SEGMENT GROWTH POTENTIAL, BY END USE, IN 2024

FIGURE 21: AEROSPACE MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 22: AUTOMOBILE MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 23: SEGMENT GROWTH POTENTIAL, BY AUTOMOBILE, IN 2024

FIGURE 24: ICE ENGINES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 25: SEGMENT GROWTH POTENTIAL, BY ICE ENGINES, IN 2024

FIGURE 26: PASSENGER VEHICLES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 27: COMMERCIAL VEHICLES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 28: ELECTRIC VEHICLES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 29: SEGMENT GROWTH POTENTIAL, BY ELECTRIC VEHICLES, IN 2024

FIGURE 30: E-BIKES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 31: E-CARS MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 32: E-BUSES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 33: E-TRUCKS MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 34: CONSUMER ELECTRONICS MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 35: GRID-SCALE ENERGY STORAGE MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 36: TELECOM MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 37: POWER TOOLS MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 38: MILITARY & DEFENSE MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 39: OTHER END USES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 40: SEGMENT GROWTH POTENTIAL, BY APPLICATION, IN 2024

FIGURE 41: AUTOMOTIVE BATTERIES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 42: PORTABLE BATTERIES MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 43: EUROPE BATTERY MARKET, COUNTRY OUTLOOK, 2024 & 2032 (IN %)

FIGURE 44: GERMANY MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 45: UNITED KINGDOM MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 46: FRANCE MARKET SIZE, 2025-2032 (IN \$ MILLION)

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FIGURE 47: ITALY MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 48: SPAIN MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 49: BELGIUM MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 50: POLAND MARKET SIZE, 2025-2032 (IN \$ MILLION)

FIGURE 51: REST OF EUROPE MARKET SIZE, 2025-2032 (IN \$ MILLION)

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