

## **North America Solid-State Battery Market Forecast 2026-2034**

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### **Report description:**

#### KEY FINDINGS

The North America solid-state battery market size is valued at \$430.84 million as of 2026 and is expected to reach \$5802.98 million by 2034, progressing with a CAGR of 38.41% during the forecast years, 2026-2034.

#### MARKET INSIGHTS

North America's solid-state battery market is experiencing robust expansion driven by several converging factors. Advanced technological infrastructure across the region supports rapid innovation in next-generation battery development. Moreover, increasing electric vehicle adoption is creating unprecedented demand for safer, higher-density energy storage solutions. Additionally, strategic partnerships between automakers and battery startups are shortening technology commercialization cycles significantly. Companies like QuantumScape and Solid Power are attracting major investments from Volkswagen and BMW, respectively. Furthermore, government-funded research programs are accelerating solid electrolyte R&D across multiple institutions. The region benefits from strong intellectual property protection and robust capital markets that facilitate startup funding.

#### REGIONAL ANALYSIS

The North America solid-state battery market growth assessment includes the analysis of the United States and Canada. The U.S. solid-state battery market dominates the North American market and held a significant share in 2025, predominantly owing to government policies promoting clean energy. The U.S. Department of Energy has prioritized research into next-generation batteries, including solid-state solutions, to enhance energy storage capabilities. QuantumScape announced a groundbreaking agreement with Volkswagen's PowerCo division in July 2024 for high-volume production of lithium-metal solid-state batteries.

The initial goal targets 40 gigawatt-hours' worth of batteries per year with an option to expand to 80 gigawatt-hours, enough for approximately one million EVs annually. This landmark deal positions PowerCo to manufacture batteries at a gigawatt-scale using QuantumScape's proprietary technology platform. Heavy investments in research and development by companies such as QuantumScape and Solid Power are propelling market expansion.

QuantumScape operates facilities in San Jose, California, where it has been conducting research since 2014. In October 2024, the company began low-volume production of its B-sample QSE-5 cells with energy density exceeding 800 Wh/L and fast charging capability from 10% to 80% in under 15 minutes. These cells are now being shipped to automotive partners for EV implementation testing. Meanwhile, U.S. investments in batteries and critical minerals refining have grown at least threefold over the past two

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years.

Battery manufacturing investments totaled \$40.9 billion from Q2 2023 through Q2 2024, largely thanks to manufacturing and investment tax credits in the Inflation Reduction Act. However, challenges remain as the vast majority of current U.S. incentives do not specifically target next-generation batteries over existing technologies. Despite this, the expanding electric vehicle market continues to drive demand for safer and more efficient battery solutions across the United States.

Canada is contributing meaningfully to regional solid-state battery development through initiatives focused on clean energy and battery technology innovation. The country's commitment to environmental sustainability aligns with solid-state battery advantages in safety and performance. Canadian research institutions are collaborating with industry partners to advance solid electrolyte materials and manufacturing processes.

Furthermore, government support for renewable energy initiatives creates favorable conditions for solid-state battery commercialization. The nation's robust mining sector provides access to critical battery materials, strengthening supply chain resilience. Consequently, Canada's strategic position in North America's battery ecosystem continues to grow steadily.

#### SEGMENTATION ANALYSIS

The North America solid-state battery market is segmented into type, battery capacity, and application. The type segment is further categorized into single-layer and multi-layer.

The single-layer segment represents a foundational architecture in North America's solid-state battery market. Single-layer solid-state batteries feature simplified construction with one electrolyte layer positioned between electrodes, minimizing manufacturing complexity significantly. This streamlined design reduces production costs compared to multi-layer alternatives while facilitating easier quality control during manufacturing processes.

Moreover, the simplified architecture enables faster production cycles and lower capital expenditure requirements for manufacturers entering the solid-state battery market. Single-layer configurations particularly appeal to applications requiring moderate energy density without extreme performance demands. Consumer electronics manufacturers favor single-layer designs for wearable devices, medical implants, and IoT sensors, where compact form factors are essential.

The medical device sector demonstrates especially strong demand, as single-layer solid-state batteries provide reliable, long-lasting power for implantable devices like pacemakers and neurostimulators. Additionally, their inherent safety advantages prove critical in medical applications where battery failure could endanger lives. The compact form factor enables the miniaturization of medical equipment, improving patient comfort significantly.

Furthermore, regulatory approvals for medical devices incorporating solid-state batteries are progressing steadily across North America. Single-layer batteries also demonstrate excellent performance stability over extended operational periods, making them ideal for applications requiring consistent power delivery. Consequently, this segment continues gaining traction in specialized applications where simplified manufacturing and reliable performance outweigh maximum energy density requirements.

#### COMPETITIVE INSIGHTS

Some of the top players operating in the North America solid-state battery market include QuantumScape Battery Inc, Solid Power Inc, Panasonic Corporation, Cymbet Corporation, etc.

QuantumScape Battery Inc operates as a leading solid-state battery developer headquartered in San Jose, California. The company specializes in developing anode-free, lithium-metal solid-state battery technology for electric vehicles and other applications. QuantumScape's proprietary ceramic separator technology enables higher energy density, faster charging, and improved safety compared to conventional lithium-ion batteries.

The company's flagship product, the QSE-5 cell, delivers over 844 Wh/L energy density with 12.2-minute fast charging from 10% to 80% state of charge. QuantumScape operates through a technology licensing business model, partnering with major automotive manufacturers like Volkswagen's PowerCo division.

In December 2024, the company completed installation of its proprietary "Cobra" separator production process, enabling gigawatt-hour scale manufacturing capabilities. This breakthrough in ceramics manufacturing provides a 25-fold improvement over previous production methods. QuantumScape has raised over \$2 billion in investment to date, with Volkswagen holding a 17% stake in the company. The firm's integrated approach combines cutting-edge materials science with scalable manufacturing processes to commercialize solid-state batteries before the end of this decade.

#### COMPANY PROFILES

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11. PRIETO BATTERY INC
12. ROBERT BOSCH
13. SOLID POWER INC
14. STMICROELECTRONICS NV
15. TOYOTA INDUSTRIES CORPORATION

## Table of Contents:

### 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. SOLID-STATE BATTERY DEMAND IS SURGING AS OEMS ACCELERATE NEXT-GEN EV PLATFORM DEVELOPMENT
    - 2.5.2. HIGH-ENERGY-DENSITY PROTOTYPES ARE MOVING FROM LAB SCALE TO PILOT LINES, DRIVING COMMERCIAL READINESS
    - 2.5.3. STRATEGIC PARTNERSHIPS BETWEEN AUTOMAKERS AND BATTERY STARTUPS ARE SHORTENING TECHNOLOGY COMMERCIALIZATION CYCLES
3. MARKET DYNAMICS
  - 3.1. KEY DRIVERS
    - 3.1.1. RISING NEED FOR SAFER BATTERIES WITH SUPERIOR THERMAL STABILITY
    - 3.1.2. INCREASING EV ADOPTION REQUIRING LONGER RANGE AND FASTER CHARGING
    - 3.1.3. GOVERNMENT FUNDED PROGRAMS ACCELERATING SOLID ELECTROLYTE R&D
    - 3.1.4. EXPANDING APPLICATIONS ACROSS WEARABLES, DRONES, AND GRID STORAGE
  - 3.2. KEY RESTRAINTS
    - 3.2.1. HIGH MANUFACTURING COSTS LIMITING LARGE-SCALE COMMERCIALIZATION
    - 3.2.2. CHALLENGES IN SCALING PRODUCTION OF DENDRITE-RESISTANT ELECTROLYTES
    - 3.2.3. SUPPLY CHAIN BOTTLENECKS IN RARE MATERIALS SUCH AS LITHIUM METAL FOILS
    - 3.2.4. UNCERTAIN LONG-TERM DURABILITY PERFORMANCE IN REAL-WORLD EV CONDITIONS
4. KEY ANALYTICS
  - 4.1. KEY MARKET TRENDS
    - 4.1.1. RAPID RISE OF OXIDE AND SULFIDE ELECTROLYTE INNOVATIONS IMPROVING IONIC CONDUCTIVITY

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- 4.1.2. AUTOMAKERS ARE SHIFTING TOWARD VERTICAL INTEGRATION OF SOLID STATE R&D AND MANUFACTURING
- 4.1.3. INCREASING INVESTMENT FLOWS INTO PILOT-SCALE GIGA-FACILITIES ACROSS THE US
- 4.1.4. EMERGENCE OF HYBRID SEMI-SOLID BATTERIES AS A TRANSITIONAL TECHNOLOGY BRIDGING CURRENT LI-ION AND FULL SOLID STATE
- 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 NORTH AMERICA
- 4.4. MARKET MATURITY ANALYSIS
- 4.5. MARKET CONCENTRATION ANALYSIS
- 4.6. VALUE CHAIN ANALYSIS
  - 4.6.1. RAW MATERIALS
  - 4.6.2. ELECTROLYTE FORMULATION
  - 4.6.3. ANODE CATHODE PROCESSING
  - 4.6.4. CELL MANUFACTURING
  - 4.6.5. PACK INTEGRATION
  - 4.6.6. OEM APPLICATIONS
- 4.7. KEY BUYING CRITERIA
  - 4.7.1. ENERGY DENSITY
  - 4.7.2. SAFETY PERFORMANCE
  - 4.7.3. COST PER KWH
  - 4.7.4. CYCLE LIFE
- 4.8. REGULATORY FRAMEWORK
- 5. □SOLID-STATE BATTERY MARKET BY TYPE
  - 5.1. SINGLE LAYER
    - 5.1.1. MARKET FORECAST FIGURE
    - 5.1.2. SEGMENT ANALYSIS
  - 5.2. MULTI-LAYER
    - 5.2.1. MARKET FORECAST FIGURE
    - 5.2.2. SEGMENT ANALYSIS
- 6. □SOLID-STATE BATTERY MARKET BY BATTERY CAPACITY
  - 6.1. LESS THAN 20 MAH
    - 6.1.1. MARKET FORECAST FIGURE
    - 6.1.2. SEGMENT ANALYSIS
  - 6.2. BETWEEN 20 MAH & 500 MAH
    - 6.2.1. MARKET FORECAST FIGURE
    - 6.2.2. SEGMENT ANALYSIS
  - 6.3. 500 MAH ABOVE
    - 6.3.1. MARKET FORECAST FIGURE
    - 6.3.2. SEGMENT ANALYSIS
- 7. □SOLID-STATE BATTERY MARKET BY APPLICATION
  - 7.1. CONSUMER ELECTRONICS
    - 7.1.1. MARKET FORECAST FIGURE

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- 7.1.2. SEGMENT ANALYSIS
- 7.2. ELECTRIC VEHICLES
  - 7.2.1. MARKET FORECAST FIGURE
  - 7.2.2. SEGMENT ANALYSIS
- 7.3. ENERGY HARVESTING
  - 7.3.1. MARKET FORECAST FIGURE
  - 7.3.2. SEGMENT ANALYSIS
- 7.4. MEDICAL DEVICES
  - 7.4.1. MARKET FORECAST FIGURE
  - 7.4.2. SEGMENT ANALYSIS
- 7.5. OTHER APPLICATIONS
  - 7.5.1. MARKET FORECAST FIGURE
  - 7.5.2. SEGMENT ANALYSIS
- 8. □ GEOGRAPHICAL ANALYSIS
  - 8.1. NORTH AMERICA
    - 8.1.1. MARKET SIZE & ESTIMATES
    - 8.1.2. NORTH AMERICA MARKET DRIVERS
    - 8.1.3. NORTH AMERICA MARKET CHALLENGES
    - 8.1.4. KEY PLAYERS IN NORTH AMERICA SOLID-STATE BATTERY MARKET
    - 8.1.5. COUNTRY ANALYSIS
      - 8.1.5.1. UNITED STATES
        - 8.1.5.1.1. UNITED STATES MARKET SIZE & OPPORTUNITIES
      - 8.1.5.2. CANADA
        - 8.1.5.2.1. CANADA 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. BRIGHTVOLT INCORPORATION
      - 9.2.1.1. COMPANY OVERVIEW
      - 9.2.1.2. PRODUCTS
      - 9.2.1.3. STRENGTHS & CHALLENGES
    - 9.2.2. CYMBET CORPORATION
      - 9.2.2.1. COMPANY OVERVIEW
      - 9.2.2.2. PRODUCTS
      - 9.2.2.3. STRENGTHS & CHALLENGES
    - 9.2.3. DYSON
      - 9.2.3.1. COMPANY OVERVIEW
      - 9.2.3.2. PRODUCTS
      - 9.2.3.3. STRENGTHS & CHALLENGES
    - 9.2.4. EXCELLATRON SOLID STATE LLC
      - 9.2.4.1. COMPANY OVERVIEW
      - 9.2.4.2. PRODUCTS
      - 9.2.4.3. STRENGTHS & CHALLENGES

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- 9.2.5. FRONT EDGE TECHNOLOGY INC
  - 9.2.5.1. COMPANY OVERVIEW
  - 9.2.5.2. PRODUCTS
  - 9.2.5.3. STRENGTHS & CHALLENGES
- 9.2.6. HITACHI ZOSEN CORPORATION
  - 9.2.6.1. COMPANY OVERVIEW
  - 9.2.6.2. PRODUCTS
  - 9.2.6.3. STRENGTHS & CHALLENGES
- 9.2.7. IMEC
  - 9.2.7.1. COMPANY OVERVIEW
  - 9.2.7.2. PRODUCTS
  - 9.2.7.3. STRENGTHS & CHALLENGES
- 9.2.8. INFINITE POWER SOLUTIONS INC (ACQUIRED BY APPLE INC)
  - 9.2.8.1. COMPANY OVERVIEW
  - 9.2.8.2. PRODUCTS
  - 9.2.8.3. STRENGTHS & CHALLENGES
- 9.2.9. PANASONIC CORPORATION
  - 9.2.9.1. COMPANY OVERVIEW
  - 9.2.9.2. PRODUCTS
  - 9.2.9.3. STRENGTHS & CHALLENGES
- 9.2.10. PLANAR ENERGY DEVICES INC
  - 9.2.10.1. COMPANY OVERVIEW
  - 9.2.10.2. PRODUCTS
  - 9.2.10.3. STRENGTHS & CHALLENGES
- 9.2.11. PRIETO BATTERY INC
  - 9.2.11.1. COMPANY OVERVIEW
  - 9.2.11.2. PRODUCTS
  - 9.2.11.3. STRENGTHS & CHALLENGES
- 9.2.12. ROBERT BOSCH
  - 9.2.12.1. COMPANY OVERVIEW
  - 9.2.12.2. PRODUCTS
  - 9.2.12.3. STRENGTHS & CHALLENGES
- 9.2.13. SOLID POWER INC
  - 9.2.13.1. COMPANY OVERVIEW
  - 9.2.13.2. PRODUCTS
  - 9.2.13.3. STRENGTHS & CHALLENGES
- 9.2.14. STMICROELECTRONICS NV
  - 9.2.14.1. COMPANY OVERVIEW
  - 9.2.14.2. PRODUCTS
  - 9.2.14.3. STRENGTHS & CHALLENGES
- 9.2.15. TOYOTA INDUSTRIES CORPORATION
  - 9.2.15.1. COMPANY OVERVIEW
  - 9.2.15.2. PRODUCTS
  - 9.2.15.3. STRENGTHS & CHALLENGES

## LIST OF TABLES

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TABLE 1: MARKET SNAPSHOT - SOLID-STATE BATTERY  
TABLE 2: MARKET BY TYPE, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)  
TABLE 3: MARKET BY TYPE, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)  
TABLE 4: MARKET BY BATTERY CAPACITY, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)  
TABLE 5: MARKET BY BATTERY CAPACITY, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)  
TABLE 6: MARKET BY APPLICATION, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)  
TABLE 7: MARKET BY APPLICATION, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)  
TABLE 8: NORTH AMERICA MARKET, COUNTRY ANALYSIS, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)  
TABLE 9: NORTH AMERICA MARKET, COUNTRY ANALYSIS, FORECAST YEARS, 2026-2034 (IN \$ MILLION)  
TABLE 10: KEY PLAYERS OPERATING IN THE NORTH AMERICAN MARKET  
TABLE 11: LIST OF MERGERS & ACQUISITIONS  
TABLE 12: LIST OF PRODUCT LAUNCHES & DEVELOPMENTS  
TABLE 13: LIST OF PARTNERSHIPS & AGREEMENTS  
TABLE 14: LIST OF BUSINESS EXPANSIONS & DIVESTITURES  
LIST OF FIGURES  
FIGURE 1: KEY MARKET TRENDS  
FIGURE 2: PORTER'S FIVE FORCES ANALYSIS  
FIGURE 3: GROWTH PROSPECT MAPPING FOR NORTH AMERICA  
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 TYPE, IN 2025  
FIGURE 9: SINGLE LAYER MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 10: MULTI-LAYER MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 11: SEGMENT GROWTH POTENTIAL, BY BATTERY CAPACITY, IN 2025  
FIGURE 12: LESS THAN 20 MAH MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 13: BETWEEN 20 MAH & 500 MAH MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 14: 500 MAH ABOVE MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 15: SEGMENT GROWTH POTENTIAL, BY APPLICATION, IN 2025  
FIGURE 16: CONSUMER ELECTRONICS MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 17: ELECTRIC VEHICLES MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 18: ENERGY HARVESTING MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 19: MEDICAL DEVICES MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 20: OTHER APPLICATIONS MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 21: NORTH AMERICA SOLID-STATE BATTERY MARKET, COUNTRY OUTLOOK, 2025 & 2034 (IN %)  
FIGURE 22: UNITED STATES MARKET SIZE, 2026-2034 (IN \$ MILLION)  
FIGURE 23: CANADA MARKET SIZE, 2026-2034 (IN \$ MILLION)

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