

Asia-Pacific Battery Market Forecast 2025-2032

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Report description:**KEY FINDINGS**

The Asia-Pacific battery market size is valued at \$88.24 billion as of 2025 and is expected to reach \$259.21 billion by 2032, progressing with a CAGR of 16.64% during the forecast period, 2025-2032.

MARKET INSIGHTS

The Asia-Pacific battery market is experiencing explosive growth driven by multiple converging forces. Electric vehicle adoption stands at the forefront, with governments across the region implementing aggressive electrification mandates and consumer subsidies. China leads this charge, targeting a complete ICE vehicle phase-out by 2035. Meanwhile, renewable energy integration demands massive grid-scale storage solutions to manage intermittent solar and wind power generation.

Consumer electronics proliferation continues unabated, with smartphones, laptops, wearables, and IoT devices driving portable power demand. Furthermore, government policies supporting clean energy transition through tax credits and stringent carbon emission regulations accelerate market expansion. Regional gigafactory proliferation is reshaping the manufacturing landscape, with companies establishing local production to serve growing domestic markets and reduce supply chain vulnerabilities.

REGIONAL ANALYSIS

The Asia-Pacific battery market growth assessment includes the analysis of China, Japan, India, South Korea, Indonesia, Vietnam, Thailand, Australia & New Zealand, and Rest of Asia-Pacific.

China dominates the global battery landscape with unparalleled manufacturing scale and vertical integration capabilities. The country controls approximately 80% of global lithium-ion battery cell production capacity, establishing it as the undisputed industry leader. Domestic giants like BYD Company Ltd and LG Chem Ltd have built massive production facilities, supported by government initiatives promoting technological self-sufficiency. Moreover, China's electric vehicle market has exploded, with over 9 million EVs sold in 2024 according to the International Energy Agency.

LFP battery technology, which eliminates expensive cobalt, has gained tremendous traction in the Chinese market due to cost advantages. Consequently, Chinese manufacturers are expanding globally, establishing joint ventures and wholly-owned facilities across Southeast Asia, Europe, and North America. The country's control of critical mineral processing, particularly lithium and graphite refining, provides strategic advantages throughout the value chain.

Battery recycling initiatives are gaining momentum across China as the government implements circular economy policies. The Ministry of Industry and Information Technology has established comprehensive regulations for battery lifecycle management and end-of-life recycling. Urban mining operations are extracting valuable materials from retired EV batteries, reducing dependence

on primary raw material extraction.

Additionally, China is pioneering battery swapping infrastructure for electric vehicles, offering an alternative to traditional charging. Companies are deploying thousands of battery swap stations across major cities, addressing range anxiety concerns. This innovative approach demonstrates China's commitment to solving practical barriers to EV adoption through infrastructure development and technological innovation.

Japan maintains its position as a technology innovation leader despite declining market share in manufacturing capacity. Panasonic Corporation, a longtime Tesla partner, operates advanced cell manufacturing facilities focusing on high-energy-density applications. Japanese manufacturers emphasize quality, safety, and technological sophistication over pure production volume. The country's automotive giants, including Toyota and Honda, are investing heavily in solid-state battery development, targeting commercial launches by 2027-2028.

Moreover, Japan's Ministry of Economy, Trade, and Industry (METI) provides substantial R&D funding for next-generation battery technologies. However, Japanese manufacturers face cost competitiveness challenges against Chinese rivals, particularly in commodity lithium-ion cells. Consequently, companies are pivoting toward premium applications, specialized chemistries, and breakthrough technologies where superior performance justifies higher pricing.

South Korea represents a critical manufacturing hub with global competitive reach through companies like LG Chem Ltd and Samsung SDI Co Ltd. These conglomerates have established extensive international manufacturing networks, supplying major automotive OEMs worldwide. South Korean battery makers excel in NMC (nickel-manganese-cobalt) chemistry, delivering high energy density for premium electric vehicles. The government provides aggressive support through the Korean New Deal, allocating billions in subsidies for battery technology development and manufacturing capacity expansion.

Furthermore, South Korean companies are investing in U.S. and European production facilities to qualify for local content requirements and government incentives. Strategic partnerships with automotive manufacturers create long-term supply agreements, ensuring revenue stability and capacity utilization. Nevertheless, South Korean manufacturers face intensifying competition from Chinese producers on pricing while simultaneously dealing with raw material supply chain vulnerabilities.

SEGMENTATION ANALYSIS

The Asia-Pacific battery market by material is segmented into lead acid, lithium-ion, nickel-based, sodium-ion, flow battery, small sealed lead-acid batteries, and other materials. The lead acid segment is further categorized into SLI, stationary, and motive. Lithium-ion batteries dominate the Asia-Pacific market, representing the majority of revenue and growth potential through 2032. Electric vehicle applications drive this segment's explosive expansion, with automotive manufacturers transitioning entire product portfolios to battery-electric platforms. Energy density improvements continue advancing, with cell-level densities now exceeding 300 Wh/kg in production vehicles. Consequently, range anxiety concerns are diminishing as EVs achieve 400-500 kilometer ranges on a single charge.

Consumer electronics applications remain robust, although growth rates moderate as smartphone markets mature in developed economies. Grid-scale energy storage emerges as a massive opportunity, with utility companies deploying multi-gigawatt-hour battery systems for renewable energy integration. Cost reductions through economies of scale and manufacturing improvements make lithium-ion increasingly competitive across diverse applications.

Battery chemistry diversification is reshaping the lithium-ion landscape, with LFP (lithium iron phosphate) capturing significant market share from NMC variants. LFP batteries offer superior thermal stability, longer cycle life, and complete elimination of cobalt dependence. Moreover, material costs run substantially lower than NMC chemistries, making LFP attractive for cost-sensitive applications. Chinese manufacturers have perfected LFP production at a massive scale, achieving competitive energy densities through cell-to-pack innovations.

Western automotive companies, initially resistant to LFP due to lower energy density, are now embracing the technology for entry-level and mid-range vehicles. Meanwhile, high-nickel NMC chemistries continue advancing for premium applications requiring maximum energy density. This chemistry diversification provides manufacturers flexibility to optimize performance and cost trade-offs across different market segments and use cases.

COMPETITIVE INSIGHTS

Some of the top players operating in the Asia-Pacific battery market include BYD Company Ltd, Panasonic Corporation, LG Chem Ltd, Samsung SDI Co Ltd, etc.

BYD Company Ltd stands as a vertically integrated powerhouse spanning electric vehicles, battery manufacturing, and renewable energy solutions. Headquartered in Shenzhen, China, BYD operates as one of the world's largest EV manufacturers while simultaneously serving as a major battery supplier to external customers. The company's blade battery technology, based on LFP chemistry, delivers enhanced safety through a structural cell-to-pack design that eliminates traditional battery modules. BYD's product portfolio encompasses passenger vehicles, commercial buses, trucks, and energy storage systems for residential and utility applications. Notably, the company exports electric buses to over 400 cities across six continents, establishing global leadership in electric commercial vehicles. Manufacturing operations span multiple Chinese provinces plus international facilities in the United States, Europe, and Southeast Asia.

Furthermore, BYD maintains complete control over its battery supply chain, from mineral processing through cell manufacturing and pack assembly. This vertical integration strategy provides cost advantages, quality control, and supply chain security that competitors struggle to match. The company's aggressive capacity expansion plans target doubling battery production by 2026, positioning BYD to capture growing global demand across automotive and stationary storage markets.

COMPANY PROFILES

1. A123 SYSTEMS LLC
2. BYD COMPANY LTD
3. C&D TECHNOLOGIES INC
4. CROWN BATTERY MANUFACTURING COMPANY
5. DURACELL
6. EAST PENN MANUFACTURING CO
7. ENERSYS
8. EVEREADY INDUSTRIES
9. EXIDE TECHNOLOGIES
10. GS YUASA INTERNATIONAL LTD
11. JOHNSON CONTROLS INC
12. LG CHEM LTD
13. PANASONIC CORPORATION
14. SAMSUNG SDI CO LTD
15. SAFT GROUPE SA

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

3.2.3. 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 ASIA-PACIFIC

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
 - 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. ASIA-PACIFIC
 - 8.1.1. MARKET SIZE & ESTIMATES
 - 8.1.2. ASIA-PACIFIC MARKET DRIVERS
 - 8.1.3. ASIA-PACIFIC MARKET CHALLENGES
 - 8.1.4. KEY PLAYERS IN ASIA-PACIFIC BATTERY MARKET
 - 8.1.5. COUNTRY ANALYSIS
 - 8.1.5.1. CHINA
 - 8.1.5.1.1. CHINA MARKET SIZE & OPPORTUNITIES
 - 8.1.5.2. INDIA
 - 8.1.5.2.1. INDIA MARKET SIZE & OPPORTUNITIES
 - 8.1.5.3. JAPAN
 - 8.1.5.3.1. JAPAN MARKET SIZE & OPPORTUNITIES

8.1.5.4. AUSTRALIA & NEW ZEALAND
8.1.5.4.1. AUSTRALIA & NEW ZEALAND MARKET SIZE & OPPORTUNITIES
8.1.5.5. SOUTH KOREA
8.1.5.5.1. SOUTH KOREA MARKET SIZE & OPPORTUNITIES
8.1.5.6. THAILAND
8.1.5.6.1. THAILAND MARKET SIZE & OPPORTUNITIES
8.1.5.7. INDONESIA
8.1.5.7.1. INDONESIA MARKET SIZE & OPPORTUNITIES
8.1.5.8. VIETNAM
8.1.5.8.1. VIETNAM MARKET SIZE & OPPORTUNITIES
8.1.5.9. REST OF ASIA-PACIFIC
8.1.5.9.1. REST OF ASIA-PACIFIC 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
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: ASIA-PACIFIC MARKET, COUNTRY ANALYSIS, HISTORICAL YEARS, 2018-2023 (IN \$ MILLION)

TABLE 17: ASIA-PACIFIC MARKET, COUNTRY ANALYSIS, FORECAST YEARS, 2025-2032 (IN \$ MILLION)

TABLE 18: KEY PLAYERS OPERATING IN THE ASIA-PACIFIC 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

LIST OF FIGURES

FIGURE 1: KEY MARKET TRENDS

FIGURE 2: PORTER'S FIVE FORCES ANALYSIS

FIGURE 3: GROWTH PROSPECT MAPPING FOR ASIA-PACIFIC

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: ASIA-PACIFIC BATTERY MARKET, COUNTRY OUTLOOK, 2024 & 2032 (IN %)
FIGURE 44: CHINA MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 45: INDIA MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 46: JAPAN MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 47: AUSTRALIA & NEW ZEALAND MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 48: SOUTH KOREA MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 49: THAILAND MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 50: INDONESIA MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 51: VIETNAM MARKET SIZE, 2025-2032 (IN \$ MILLION)
FIGURE 52: REST OF ASIA-PACIFIC MARKET SIZE, 2025-2032 (IN \$ MILLION)

Asia-Pacific Battery Market Forecast 2025-2032

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