European battery manufacturers, market share 2025

Velstrand Research, proprietary research. Topic: batteries. Region: Europe. Period: 2025.

Executive summary

European lithium-ion cell output reached 235.6 GWh in 2025, up 18.7% year on year.

The five largest manufacturers held 88.9% of European output. Aurelion Cells extended its lead to 31.4% of the market, while Kestrel Energy Storage slipped to 22.7%.

Brightwell Power was the fastest-growing manufacturer, gaining 3.4 points of market share.

Market share by manufacturer

Share of European lithium-ion cell output by manufacturer, 2025, and change versus 2024 in percentage points.

Manufacturer	Share 2025 (%)	Change vs 2024 (pts)
Aurelion Cells	31.4	+2.4
Kestrel Energy Storage	22.7	-1.6
Valmora Batteries	14.9	+0.8
Brightwell Power	11.3	+3.4
Ferrovolt	8.6	+1.1
Others	11.1	-6.1

Output and utilisation by country

Lithium-ion cell output and average plant utilisation by country, 2025. Poland alone produced 86.3 GWh.

Country	Output 2025 (GWh)	Utilisation (%)
Poland	86.3	78.4
Hungary	58.7	71.2
Germany	47.2	64.9
Sweden	23.8	52.7
France	19.6	58.3

Methodology

Market shares are computed on cell output in GWh, not on revenue. Output is estimated from plant-level shipment data for 27 production sites, cross-checked with customs records.

We conducted 43 interviews with plant managers, procurement teams and equipment suppliers between January and November 2025. Figures are rounded to one decimal place.