

# Cylindrical lithium batteries are in serious oversupply

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Can domestic lithium supply satisfy Future EV batteries' lithium demand?

The growth of domestic lithium production in China, Europe, and the USA underscores the importance of determining to what extent domestic supply can satisfy future EV batteries' lithium demand and whether imports will be necessary. Given that lithium is also used in other sectors such as glassmaking, an analysis of how lithium is used is warranted.

Why are Lithium prices falling?

The International Energy Agency warns of potential lithium shortages as demand increases, while mining challenges and the long timeline for new production contribute to supply concerns. Lithium prices are not reflecting real-world demand trends for the battery metals, which may at some point lead to a dramatic correction.

Will China crack down on lithium overcapacity?

But Beijing's July pledge to crack down on overcapacity across several sectors including lithium and the August production halt at Chinese battery giant CATL's (300750.SZ) Jianxiawo mine, accounting for around 3% of global supply, sparked a global price surge.

Why are Lithium prices so high in 2023 - 2024?

While long-term prices are stable and follow supply cost curves, short-term imbalances can cause price spikes, driving rapid supply expansion. Recent lithium oversupply led to a 2023-2024 price crash, prompting miners to halt production and expansion. However, this may be temporary, due to the rapid increase in demand.

The global market for lithium-ion batteries is expected to remain oversupplied through 2028, pushing prices downward, as lower ...

Dive Brief: The global market for lithium-ion batteries is expected to remain oversupplied through 2028, pushing prices downward, as lower electric vehicle production ...

Lithium producers are feeling the pinch as oversupply drives prices down. Major players like Albemarle Corp. and Arcadium Lithium PLC have paused expansion plans, while ...

The global lithium market endured a bruising 2025, with persistent oversupply and softer-than-expected electric vehicle (EV) ...

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Explore the trends and challenges of lithium oversupply in 2025, including market sentiment and new supply sources.

Middle East conflicts are disrupting global oil supply, likely driving oil prices higher and boosting demand for EVs, hybrids, and lithium batteries. Lithium oversupply from 2023 ...

This study evaluates lithium supply-demand conflicts in the three primary EV markets by 2030 across 16 scenarios, factoring in battery capacity, policy commitments, and ...

Middle East conflicts are disrupting global oil supply, likely driving oil prices higher and boosting demand for EVs, hybrids, and ...

A boom in battery storage has bolstered the demand outlook for lithium in 2026, driving hopes for an accelerated turnaround for an industry struggling with oversupply.

Lithium prices are not reflecting actual demand trends, with some experts warning of a potential correction due to oversupply ...

The global market for lithium-ion batteries is expected to remain oversupplied through 2028, pushing prices downward, as lower electric vehicle production targets in the ...

The global lithium-ion battery market is expected to stay oversupplied till 2028 due to a decline in EV production targets in the US and EU, according to Clean Energy Associates" ...

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