

# Europe Second-Life EV Batteries Market: Focus on Application, Product, and Country - Analysis and Forecast, 2024-2033

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## Abstracts

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### Europe Second-Life EV Batteries Market Overview

The Europe second-life EV batteries market is positioned for substantial growth. It was valued at \$188.3 million in 2023 and is expected to reach \$5,859.5 million by 2033, reflecting a CAGR of 40.93%. Europe second-life EV batteries market is poised for significant expansion driven by multiple factors. The surge in EV sales is generating a substantial supply of retired batteries, which are increasingly recognized for their potential in stationary energy storage applications. Concurrently, the escalating deployment of renewable energy sources necessitates efficient and cost-effective energy storage solutions, further enhancing the market's appeal. Government initiatives and subsidies play a pivotal role as they incentivize the adoption of second-life batteries, promoting sustainability and circular economy principles. By repurposing these batteries for stationary storage, Europe aims to reduce waste and mitigate the depletion of natural resources, aligning with stringent environmental regulations and sustainability targets. This optimistic forecast anticipates a dynamic market environment where technological advancements and supportive policies drive continuous innovation and investment in leveraging second-life EV batteries for stationary energy storage across Europe.

### Introduction to Second-Life EV Batteries

Second-life batteries are those that are repurposed for new applications after

completing their primary lifecycle. Although these batteries retain approximately 70-80% of their capacity after their automotive life ends, they can be effectively utilized in stationary systems, especially when paired with renewable energy sources such as wind and solar, or to support the electricity grid. Repurposing second-life batteries offers significant economic and environmental benefits by reducing their carbon footprint, increasing the renewable energy available on the grid, and lowering the cost of electric vehicles by converting waste disposal expenses into residual value.

## Market Introduction

The Europe second-life EV batteries market is a crucial component in the circular economy and sustainable energy landscape. This market focuses on repurposing used electric vehicle (EV) batteries for secondary applications, thereby extending their lifecycle and maximizing their value. Second-life EV batteries are essential for various applications, including energy storage systems, renewable energy integration, and grid stabilization, contributing to the reduction of e-waste and the promotion of sustainable practices. The study explores diverse applications within the market, such as residential and commercial energy storage, industrial power backup, and renewable energy storage. Based on the type of battery, the market has been segmented into lithium-ion, nickel-metal hydride, and others. Additionally, the research categorizes the market by the end user, encompassing utility companies, renewable energy providers, and commercial and industrial enterprises. The research methodology incorporates extensive primary interviews with industry experts, market leaders, and stakeholders, supported by secondary research from various reliable databases. Advanced analytical tools have been employed to construct precise forecasts and predictive models, ensuring a comprehensive understanding of market dynamics and future trends in the Europe second-life EV batteries market.

## Industrial Impact

The Europe second-life EV batteries market significantly impacts energy storage solutions, technological innovation, and sustainable energy practices. Advances in second-life battery applications, such as residential and commercial energy storage, renewable energy integration, and grid stabilization, enhance the efficiency and sustainability of energy systems. These innovations have promoted collaborations between battery manufacturers, energy companies, and technology providers, driving the development of sophisticated energy storage solutions and expanding the potential of renewable energy sources. As a result, the emphasis on repurposing used EV batteries and reducing electronic waste aligns with Europe's sustainability goals,

thereby influencing energy practices and promoting the adoption of eco-friendly and cost-effective energy storage solutions.

The key players operating in the Europe Second-Life EV Battery market include BeePlanet Factory, Connected Energy Ltd., Zenobe Energy Limited, B-ON, ECO STOR GmbH, Enel Spa, Octave BV, TRICERA energy GmbH, encore, STABL Energy GmbH, and others. These companies have been focusing on strategic partnerships, collaborations, and acquisitions to enhance their product offerings and expand their market presence.

Market Segmentation:

Segmentation 1: by Application

Non-Automotive Applications

Power Backup

Grid Connection

Others

Automotive Applications

EV Charging

Vehicle

Non-Automotive Segment to Dominate the Europe Second-Life EV Batteries Market (by Application)

The application of second-life EV batteries in non-automotive sectors is crucial in the Europe market, particularly for power backup, grid connection, and solar energy storage. These batteries optimize energy storage performance and longevity by efficiently managing states such as voltage, temperature, and charge status. By precisely controlling and regulating charging and discharging processes, they enhance system efficiency and ensure batteries operate within safe parameters, balancing the charge to prevent overcharging or deep discharging. Advanced second-life battery

systems also integrate with grid management and renewable energy systems, offering real-time data for predictive maintenance and energy management. This integration significantly extends battery life, improves reliability, and maximizes efficient power use, contributing to environmental sustainability.

## Segmentation 2: by Battery Type

Lithium-Ion

Lead-Acid

Nickel-Based

Other Batteries

## Lithium-Ion Segment to Dominate the Market (by Battery Type)

Lithium-ion batteries dominate the Europe second-life EV batteries market due to their exceptional performance and reliability. Renowned for their high energy density, lightweight, and long cycle life, Li-ion batteries are ideal for secondary applications such as energy storage systems, grid support, and renewable energy integration. In second-life uses, these batteries continue to provide significant benefits by maintaining a substantial portion of their original capacity. Their high energy-to-weight ratio ensures efficient energy storage in compact spaces, which is crucial for stationary systems. With extended lifespans and the ability to rapidly charge and discharge, Li-ion batteries reduce maintenance costs and enhance operational efficiency. Their minimal self-discharge rate allows for longer storage periods without significant energy loss, solidifying their position as the leading battery type in the Europe second-life EV batteries market.

## Recent Developments in the Europe Second-Life EV Battery Market

In May 2024, Connected Energy Ltd.'s launch of an online calculator marks a strategic move to empower stakeholders in the EV ecosystem. By providing a tool to evaluate the integration of battery energy storage systems with EV charging infrastructure, the company enhances decision-making capabilities for fleet depots, charging hubs, and dealerships.

In May 2024, STABL Energy GmbH, known for its scalable industrial battery storage solutions, partnered with NOVUM Engineering, leveraging NOVUM's AI-based battery diagnostics expertise. This collaboration aims to repurpose high-quality automotive batteries, enhancing energy efficiency and sustainability. By optimizing battery storage systems through innovative technology, this partnership underscores STABL Energy's commitment to advancing sustainable energy solutions.

In October 2023, the launch of the Energy Storage System by ECO STOR GmbH marked a significant step forward in battery energy storage. With a \$275.0 million investment in Wittlich, Germany, the project includes six ES-50C blocks, each with 50MW/100MWh capacity, highlighting the company's dedication to renewable energy and grid stability. This initiative is set to enhance the region's energy infrastructure, reinforcing the company's status as a key innovator in sustainable energy.

In September 2022, Kia Europe announced a strategic partnership with encore, a Deutsche Bahn startup, to repurpose EV batteries for second-life battery energy storage systems. This collaboration aims to develop sustainable energy solutions by giving used EV batteries a new purpose.

In August 2022, the first battery storage system was unveiled at the EUREF-Campus in Berlin, integrated into a Micro Smart Grid. This initiative underscores encore's dedication to fostering a circular economy and advancing sustainable mobility at an early stage.

## Demand - Drivers, Limitations, and Opportunities

### Market Driver: Growth in EV Sales Resulting in Increased Availability of Retired EV Batteries

The surge in electric vehicle (EV) sales across Europe is significantly driving the market for second-life EV batteries. This growth is attributed to several factors, including increased consumer demand for sustainable transportation solutions, supportive government policies, and advancements in EV technology. According to the European Automobile Manufacturers Association (ACEA), the market share of hybrid electric vehicles accounted for 19.6% of all new passenger cars registered across the EU in 2021, while BEV accounted for 9.1% and PHEV for 8.9%, reflecting a substantial

increase from previous years. This trend is expected to continue, with projections indicating that EVs will dominate the automotive market in the coming decades. As EV adoption accelerates, the volume of retired EV batteries is also increasing. By 2030, in Italy alone, it is estimated that 60,000 tons of electric vehicle batteries will have to be disposed of per year. These batteries, though no longer suitable for automotive use, still retain substantial capacity for other applications. The European Environment Agency (EEA) reports that the typical EV battery retains up to 70-80% of its initial capacity even after it is retired from vehicle use. This residual capacity presents a valuable opportunity for repurposing in secondary applications, such as stationary energy storage systems, grid stabilization, and renewable energy integration. Furthermore, the European Union's regulatory framework supports the reuse and recycling of EV batteries, aligning with the region's broader circular economy goals. The EU Battery Directive emphasizes sustainable battery management practices, including recycling and repurposing end-of-life batteries. This regulatory environment not only encourages the development of second-life battery solutions but also ensures compliance and standardization across the market.

#### Market Challenge: Lack of Established Standards for Second-Life Battery Quality and Performance

A significant restraint for the Europe second-life EV batteries market is the lack of established standards for battery quality and performance. This absence of standardized criteria poses several challenges for stakeholders across the supply chain, from manufacturers to end users. Without clear guidelines, it is difficult to ensure the reliability and safety of repurposed batteries, which can vary widely in terms of capacity, efficiency, and longevity.

The European Union has recognized the importance of creating a cohesive regulatory framework for second-life batteries, yet progress has been slow. While efforts are underway to develop standards, the current landscape remains fragmented, causing uncertainty and hesitation among potential investors and adopters. This fragmentation can lead to inconsistent performance and safety issues, ultimately undermining consumer confidence and market growth.

Moreover, the lack of standards complicates the valuation and insurance of second-life batteries. Financial institutions and insurers are often reluctant to provide funding or coverage for assets with unpredictable performance metrics, further stifling market expansion. This issue is particularly pressing as the market scales up. The projected increase in second-life battery applications will require robust quality assurance



mechanisms to ensure market stability and consumer protection.

In conclusion, the absence of established standards for second-life EV battery quality and performance is a critical market restraint in Europe. Addressing this challenge through comprehensive regulatory frameworks and industry-wide standards is essential for fostering confidence, ensuring safety, and supporting sustainable growth in the Europe second-life EV batteries market. Establishing such standards will not only enhance the reliability of repurposed batteries but also facilitate greater investment and adoption, driving the market forward.

### Market Opportunity: Government Initiatives and Subsidies

Government initiatives and subsidies are creating significant market opportunities for the Europe second-life EV batteries market. These measures are designed to foster innovation, sustainability, and economic growth, thereby driving the adoption and integration of second-life battery technologies.

One notable example is the WMG at the University of Warwick, which has unveiled a new EV battery recycling scale-up facility, the first of its kind in the U.K. This facility aims to enhance the efficiency of battery recycling processes, thereby supporting the supply chain for second-life batteries. By facilitating the recycling and repurposing of EV batteries, this initiative not only addresses environmental concerns but also ensures a steady supply of high-quality second-life batteries for various applications.

In addition, Enel X, in collaboration with Aeroporti di Roma, secured a \$3.37 million grant from the European Innovation Fund for the PIONEER project. This project focuses on utilizing second-life batteries for airport sustainability at Rome–Fiumicino International Airport Leonardo da Vinci. By integrating second-life battery storage solutions, the project aims to enhance energy efficiency and sustainability at one of Europe's busiest airports. This grant exemplifies the substantial financial support available for innovative projects that leverage second-life EV batteries to improve energy management and sustainability.

These examples illustrate the broader trend of governmental and institutional support for second-life EV battery initiatives. Such support not only mitigates financial risks but also accelerates the development and deployment of advanced battery technologies. In conclusion, government initiatives and subsidies present a robust market opportunity for the second-life EV batteries market in Europe, driving innovation, sustainability, and economic growth in this emerging sector.

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader understand the different applications of second-life EV batteries available based on application (non-automotive applications and automotive applications), battery type (lithium-ion, lead-acid, nickel-based, and other batteries). The market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of the importance of second-life EV batteries. Therefore, the Europe second-life EV batteries market business is a high-investment and high-revenue generating model, which is expected to open new avenues of growth for the market stakeholders.

**Growth/Marketing Strategy:** The Europe second-life EV batteries market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include product development.

**Competitive Strategy:** The key players in the Europe second-life EV batteries market analyzed and profiled in the study include manufacturers. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

## Research Methodology

### Factors for Data Prediction and Modeling

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to June 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation



were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

## Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the Europe second-life EV batteries market.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

## Primary Research

The primary sources involve industry experts from the Europe second-life EV batteries market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of reports segmentation and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for market type

## Secondary Research

This research study of the Europe second-life EV batteries market involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as IRENA and IEA.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

## Key Market Players and Competition Synopsis

The companies profiled in the Europe second-life EV batteries market have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

BeePlanet Factory

Connected Energy Ltd.

Zenobe Energy Limited

B-ON

ECO STOR GmbH

Enel Spa

Octave BV

TRICERA energy GmbH

encore

STABL Energy GmbH

Companies not part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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