

Global Battery Black Mass Recycling Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Battery Black Mass Recycling Equipment market size is expected to reach \$ 3088 million by 2032, rising at a market growth of 4.3% CAGR during the forecast period (2026-2032).

Battery black mass recycling equipment refers to resource recovery machinery and integrated process systems designed for spent lithium-ion batteries, retired EV battery modules, battery packs and battery manufacturing scrap. Its core function is to safely perform discharging, dismantling, shredding, drying, screening, air separation, magnetic separation, metal foil separation, powder collection and downstream hydrometallurgical refining, converting complex mixed battery materials into black mass, copper, aluminum, steel casings, plastics and intermediate materials for the further recovery of nickel, cobalt, manganese and lithium. This category addresses the challenges of hazardous end-of-life batteries, complex material composition, high embedded material value and difficult separation. It is commonly delivered as standalone equipment, modular systems, skid-mounted units or complete production lines. Key technologies include low-oxygen or inert-atmosphere shredding, vacuum or low-temperature drying, electrolyte recovery, fine powder screening, enclosed negative-pressure conveying, dust explosion protection and hydrometallurgical leaching and purification. Typical customers include battery recyclers, cathode and anode material producers, battery manufacturers, automotive recycling platforms and environmental engineering companies.

Battery black mass recycling equipment is evolving from environmental treatment machinery into critical infrastructure within the battery materials supply chain. As retired EV battery volumes increase and battery manufacturing scrap expands, recyclers no longer focus only on safely shredding waste batteries. They need to produce high-

quality black mass that can be reliably used in hydrometallurgical processing and material regeneration. As an intermediate product connecting spent batteries with recovered metals, black mass quality, particle size, metal foil contamination, moisture content and impurity levels directly affect the recovery efficiency of nickel, cobalt, manganese and lithium. As a result, the value of equipment is shifting from single-machine crushing capacity to full-process material control, covering discharging, dismantling, low-oxygen shredding, vacuum drying, screening, copper and aluminum separation, powder collection, off-gas treatment and explosion protection. Complete production lines with continuous operation, enclosed processing, automated monitoring and stable black mass output will be more competitive than low-cost standalone machines. Policy and compliance requirements are becoming important drivers of the battery black mass recycling equipment market. The EU Battery Regulation sets clear targets for recycling efficiency and critical metal recovery from waste batteries, pushing recyclers away from basic dismantling and simple separation toward high-recovery, traceable and scalable treatment processes. For equipment suppliers, this means that production lines must not only produce black mass but also meet requirements for safety, environmental protection, dust control, off-gas purification, electrolyte handling and material flow management. Because spent lithium-ion batteries involve residual electricity, flammable electrolytes and dust explosion risks, the core barriers of equipment systems will increasingly lie in low-oxygen or inert-atmosphere control, enclosed negative-pressure conveying, vacuum drying, explosion-proof dust collection and automated interlock protection. As regulatory standards tighten and closed-loop battery material systems take shape, equipment purchasing decisions will focus more on operating reliability and final recovery economics than on upfront equipment cost alone. From a regional and competitive perspective, Asia-Pacific remains the core demand and supply center for battery black mass recycling equipment. China, South Korea and Japan have relatively complete battery manufacturing and material ecosystems, which means battery scrap and end-of-life battery treatment demand appeared earlier and supported the development of local shredding, separation, line integration and powder handling systems. Europe and North America are accelerating recycling capacity construction under the combined influence of regulation, automotive supply chain localization and critical mineral security. New projects in these regions are more likely to adopt automated, low-emission systems that can connect directly with hydrometallurgical processing. The market will likely develop around two major opportunities: high-throughput complete lines for large recycling plants and modular systems for battery manufacturing scrap and regional recycling centers. As black mass shifts from intermediate waste into a tradable strategic resource, equipment competition will increasingly focus on black mass quality, integration with metal recovery processes and lifecycle service capability.

This report studies the global Battery Black Mass Recycling Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Battery Black Mass Recycling Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Battery Black Mass Recycling Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Battery Black Mass Recycling Equipment total production and demand, 2021-2032, (Units)

Global Battery Black Mass Recycling Equipment total production value, 2021-2032, (USD Million)

Global Battery Black Mass Recycling Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Battery Black Mass Recycling Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Battery Black Mass Recycling Equipment domestic production, consumption, key domestic manufacturers and share

Global Battery Black Mass Recycling Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Battery Black Mass Recycling Equipment production by Processing Stage, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Battery Black Mass Recycling Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Battery Black Mass Recycling Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ANDRITZ, BHS-Sonthofen, Metso, MTB Recycling, Stokkermill, Hosokawa Micron Group, GENOX Recycling Tech, GEP ECOTECH, SUNY GROUP, Guanma Machinery, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Battery Black Mass Recycling Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Processing Stage, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Battery Black Mass Recycling Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Battery Black Mass Recycling Equipment Market, Segmentation by Processing Stage:

Black Mass Production Equipment

Black Mass Refining Equipment

Metal Foil Sorting Equipment

Powder Transfer Equipment

Global Battery Black Mass Recycling Equipment Market, Segmentation by Feedstock Object:

Consumer Battery Processing Equipment

Power Battery Module Processing Equipment

Battery Pack Processing Equipment

Manufacturing Scrap Processing Equipment

Global Battery Black Mass Recycling Equipment Market, Segmentation by Safety Control Method:

Nitrogen Inerting Equipment

Water-Sealed Wet Equipment

Vacuum Low-Oxygen Equipment

Negative-Pressure Enclosed Equipment

Global Battery Black Mass Recycling Equipment Market, Segmentation by Application:

Black Mass Production in Recycling Plants

Battery Plant Scrap Processing

Hydrometallurgical Feedstock Preparation

Safe Black Mass Storage and Transfer

Recycled Material Quality Improvement

Companies Profiled:

ANDRITZ

BHS-Sonthofen

Metso

MTB Recycling

Stokkermill

Hosokawa Micron Group

GENOX Recycling Tech

GEP ECOTECH

SUNY GROUP

Guanma Machinery

Xingmao Machinery

BCA Industries

Engineered Recycling Systems

Elcan Industries

Met-Chem

Key Questions Answered:

1. How big is the global Battery Black Mass Recycling Equipment market?
2. What is the demand of the global Battery Black Mass Recycling Equipment market?
3. What is the year over year growth of the global Battery Black Mass Recycling Equipment market?
4. What is the production and production value of the global Battery Black Mass

Recycling Equipment market?

5. Who are the key producers in the global Battery Black Mass Recycling Equipment market?

6. What are the growth factors driving the market demand?

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