

Global Copper Removal Reagent for Battery Black Mass Leachate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Copper Removal Reagent for Battery Black Mass Leachate market size is expected to reach \$ 113 million by 2032, rising at a market growth of 17.4% CAGR during the forecast period (2026-2032).

Copper removal reagents for battery black mass leachate are physical chemical products and functional materials used in the hydrometallurgical recycling of lithium ion battery black mass to remove copper impurities from acidic leachate. The product mainly covers copper solvent extraction reagents, copper chelating resins, ion exchange resins, selective precipitation reagents and formulated impurity removal chemicals. These products are applied after black mass leaching and before downstream nickel, cobalt, manganese and lithium separation, purification, precipitation or crystallization. Their core function is to selectively capture, extract, precipitate or recover copper ions while minimizing the loss of valuable battery metals. Main technical routes include oxime based solvent extraction, chelating resin adsorption, ion exchange, sulfide precipitation, reductive precipitation and combined impurity removal processes. Key performance indicators include copper selectivity, copper removal efficiency, co removal of nickel, cobalt and manganese, acid resistance, phase separation speed, resin exchange capacity, regeneration performance, chemical consumption per ton of black mass and compatibility with high salt acidic leachate. The product is mainly used in ternary battery black mass, mixed black mass, production scrap black mass and copper rich intermediate leachate purification. In 2025, the global average gross margin of copper removal reagents for battery black mass leachate was 28%, the industry average price was 5500 USD per ton.

Copper removal reagents for battery black mass leachate are positioned as process

purification materials within the hydrometallurgical battery recycling value chain. Upstream inputs include specialty chemical intermediates, extractant raw materials, resin monomers, functional polymers, sulfide chemicals and formulation additives. Midstream suppliers convert these inputs into copper extraction reagents, chelating resins, ion exchange resins and formulated impurity removal products. Downstream demand mainly comes from black mass hydrometallurgical recyclers, nickel cobalt manganese salt producers, lithium salt recovery plants and recycled cathode material manufacturers. As feedstock shifts from relatively controlled production scrap to mixed end of life batteries and heterogeneous black mass, copper impurity control becomes more important. The product is therefore evolving from a general hydrometallurgical auxiliary chemical into a more application specific purification material focused on selectivity, low valuable metal loss and compatibility with continuous recycling lines.

The competitive landscape is characterized by a small market size, high technical specificity and multiple process routes. Copper solvent extraction reagents are more relevant for leachates with higher copper content and for processes that intend to recover copper as a value stream. Chelating resins and ion exchange resins are better suited for deep purification, polishing and low residual copper control. Precipitation based reagents are more common in cost sensitive or front end impurity removal steps. Global supply is shared by specialty chemical companies, metal extractant producers, functional resin manufacturers and regional formulation suppliers. Because most companies do not separately disclose revenue from black mass copper removal applications, competition is better understood through product route, manufacturing capability, customer qualification and process fit rather than reported segment revenue alone.

Policy and industry dynamics are gradually strengthening the role of copper removal reagents in compliant black mass refining. Higher recycling efficiency requirements, stricter control of recycled black mass flows, new hydrometallurgical recycling projects and regional battery material supply chain localization all support higher demand for stable leachate purification chemicals. Future growth will mainly come from rising ternary black mass processing volumes, more complex impurity profiles in mixed feedstock, higher purity requirements for battery grade salts and the shift toward larger continuous wet process lines. The industry will still face substitution pressure from electrochemical copper removal, internal reagent preparation and process redesign. However, as black mass refining scales up and quality requirements become stricter, specialized copper removal reagents and copper selective purification materials are expected to become more important in the recycling process.

This report studies the global Copper Removal Reagent for Battery Black Mass Leachate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Copper Removal Reagent for Battery Black Mass Leachate 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 Copper Removal Reagent for Battery Black Mass Leachate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Copper Removal Reagent for Battery Black Mass Leachate total production and demand, 2021-2032, (Tons)

Global Copper Removal Reagent for Battery Black Mass Leachate total production value, 2021-2032, (USD Million)

Global Copper Removal Reagent for Battery Black Mass Leachate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Copper Removal Reagent for Battery Black Mass Leachate consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Copper Removal Reagent for Battery Black Mass Leachate domestic production, consumption, key domestic manufacturers and share

Global Copper Removal Reagent for Battery Black Mass Leachate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Copper Removal Reagent for Battery Black Mass Leachate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Copper Removal Reagent for Battery Black Mass Leachate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Copper Removal Reagent for Battery Black Mass Leachate 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 BASF SE, Syensqo SA, Chongqing Kopper Chemical Industry Corp., Ltd., Sunresin New Materials Co., Ltd., LANXESS AG, DuPont de Nemours, Inc., Ecolab Inc., Luoyang Zhongda Chemical Co., Ltd., Luoyang Aoda Chemical Co., Ltd., Sanmenxia Zhongda Chemical Co., Ltd., 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 Copper Removal Reagent for Battery Black Mass Leachate market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, 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 Copper Removal Reagent for Battery Black Mass Leachate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Copper Removal Reagent for Battery Black Mass Leachate Market,
Segmentation by Type:

Copper Solvent Extraction Reagents

Chelating and Ion Exchange Resins

Selective Precipitation Reagents

Reductive and Cementation Reagents

Formulated Copper Removal Reagents

Others

Global Copper Removal Reagent for Battery Black Mass Leachate Market,
Segmentation by Feedstock Type:

Ternary Battery Black Mass

Mixed Battery Black Mass

Production Scrap Black Mass

End of Life Battery Black Mass

Copper Rich Intermediate Leachate

Others

Global Copper Removal Reagent for Battery Black Mass Leachate Market,
Segmentation by Form:

Liquid Reagents

Solid Powder Reagents

Resin Beads and Granules

Others

Global Copper Removal Reagent for Battery Black Mass Leachate Market, Segmentation by Application:

Nickel Cobalt Manganese Salt Production

Lithium Salt Recovery

Recycled Cathode Material Production

Copper by-product Recovery

Wastewater and Process Water Treatment

Others

Companies Profiled:

BASF SE

Syensqo SA

Chongqing Kopper Chemical Industry Corp., Ltd.

Sunresin New Materials Co., Ltd.

LANXESS AG

DuPont de Nemours, Inc.

Ecolab Inc.

Luoyang Zhongda Chemical Co., Ltd.

Luoyang Aoda Chemical Co., Ltd.

Sanmenxia Zhongda Chemical Co., Ltd.

Key Questions Answered:

1. How big is the global Copper Removal Reagent for Battery Black Mass Leachate market?
2. What is the demand of the global Copper Removal Reagent for Battery Black Mass Leachate market?
3. What is the year over year growth of the global Copper Removal Reagent for Battery Black Mass Leachate market?
4. What is the production and production value of the global Copper Removal Reagent for Battery Black Mass Leachate market?
5. Who are the key producers in the global Copper Removal Reagent for Battery Black Mass Leachate market?
6. What are the growth factors driving the market demand?

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