

Global Extractants for Battery Recycling Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Extractants for Battery Recycling market size was valued at US\$ 115 million in 2025 and is forecast to a readjusted size of US\$ 296 million by 2032 with a CAGR of 14.5% during review period.

Extractants for Battery Recycling are functional chemical materials used in hydrometallurgical recycling processes for lithium-ion batteries, EV batteries, and energy storage batteries, primarily designed for the selective separation, purification, and enrichment of lithium, nickel, cobalt, manganese, copper, and other valuable metals from black mass leachates. This research mainly focuses on extractants used in battery metal recycling applications, including organophosphorus extractants, amine-based extractants, carboxylic extractants, and synergistic mixed systems such as Cyanex-series, P507, D2EHPA, PC88A, Alamine, Aliquat, and customized formulations. These products are generally supplied as liquid solvent-extraction systems and involve key technologies such as molecular coordination engineering, phase equilibrium control, selective metal extraction, stripping optimization, and cyclic stability enhancement. Major performance indicators include metal selectivity, extraction efficiency, loading capacity, stripping performance, phase separation speed, chemical resistance, and operational lifetime. Battery recycling extractants are widely applied in EV battery recycling, ternary precursor regeneration, nickel-cobalt-lithium purification, black mass hydrometallurgy, and closed-loop critical mineral recovery systems, serving as one of the key enabling materials in the global circular battery economy. In 2025, the global battery recycling extractants industry is estimated to maintain an average gross margin of approximately 28%-45%.

The global extractants for battery recycling industry remains a high-growth niche within

the broader advanced chemical and battery recycling materials market. The primary demand driver no longer comes from conventional mining hydrometallurgy, but increasingly from the rapid expansion of end-of-life EV battery recycling and critical mineral circularity. As EV penetration continues to increase worldwide and governments across China, Europe, and North America strengthen battery recycling regulations and local supply-chain requirements, hydrometallurgical recycling technologies are gaining stronger adoption due to their advantages in metal recovery efficiency, impurity control, and high-value metal regeneration. Demand growth is therefore increasingly concentrated in selective extraction systems designed for lithium, nickel, cobalt, and manganese recovery from black mass leachates. While nickel-cobalt-manganese battery systems still dominate current extractant consumption, new extraction chemistries for lithium recovery from LFP battery streams are gradually entering commercialization, indicating a broader transition from ?cobalt-centric recovery? toward full-element resource circularity.

From the supply-side perspective, the industry currently exhibits a layered competitive structure composed of traditional solvent-extraction chemical groups, emerging battery-recycling-focused formulation suppliers, and regional specialty extractant manufacturers. Established hydrometallurgical chemical companies continue to maintain technological leadership through proprietary molecular systems, long-term process know-how, and industrial-scale manufacturing capabilities, particularly in high-purity nickel-cobalt separation applications. At the same time, the number of specialized entrants targeting battery black mass recycling is expanding rapidly, especially in China, South Korea, and Taiwan. Many newer companies are developing customized extractant blends specifically optimized for lithium battery recycling conditions. As a result, the broad supplier universe is significantly larger than the actual core commercial supplier base, since many conventional extractant producers have not yet achieved stable qualification within mainstream EV battery recycling supply chains.

From a technology-route perspective, the market is evolving from standard single-component extractants toward synergistic mixed systems, environmentally optimized solvent systems, and high-selectivity formulations. Because black mass feedstocks contain highly variable impurity profiles and recycling plants often operate under different hydrometallurgical flowsheets, traditional mining-oriented extractants are increasingly insufficient for advanced battery recycling applications. Customized extraction systems capable of improving selectivity, lowering metal losses, minimizing emulsification, and maintaining long-cycle stability are becoming strategically important. From a policy standpoint, Europe and North America are accelerating localization of critical mineral recovery and recycled material utilization, while China continues

strengthening regulations related to retired EV battery resource recovery. These developments are driving global investment into hydrometallurgical recycling infrastructure and supporting long-term demand growth for advanced extraction chemistries.

According to our research, future industry competition will increasingly depend not only on chemical supply capabilities, but also on process integration expertise, extraction selectivity, customer qualification cycles, and closed-loop recycling ecosystem participation. Leading battery recyclers are becoming more inclined to establish long-term co-development relationships with extractant suppliers in order to optimize metal recovery efficiency and operational economics. Meanwhile, regional supply-chain localization is emerging as an important industry trend, particularly in Europe and North America, where domestic recycling ecosystems and local sourcing strategies are receiving strong policy support. Over the long term, the industry is expected to maintain above-average growth momentum, although it may also face structural uncertainties related to the rising share of LFP batteries, development of direct recycling technologies, and the emergence of alternative non-hydrometallurgical recycling routes. As a result, technological differentiation, customer certification capability, and process compatibility are likely to become the key determinants of future market leadership.

This report is a detailed and comprehensive analysis for global Extractants for Battery Recycling market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Target Metal and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Extractants for Battery Recycling market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Extractants for Battery Recycling market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Extractants for Battery Recycling market size and forecasts, by Target Metal and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling

prices (US\$/kg), 2021-2032

Global Extractants for Battery Recycling market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Extractants for Battery Recycling

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Extractants for Battery Recycling market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Syensqo, BASF SE, Clariant AG, Dow Inc., LANXESS AG, Sunresin New Materials Co., Ltd., Zhengzhou Meiya Chemical Products Co., Ltd., Kopper Chemical Industry Co., Ltd., etc.

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

Market Segmentation

Extractants for Battery Recycling market is split by Target Metal and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Target Metal, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Target Metal

Lithium Recovery Extractants

Nickel Recovery Extractants

Cobalt Recovery Extractants

Manganese Recovery Extractants

Copper Recovery Extractants

Multi-metal Recovery Systems

Others

Market segment by Complexity

Single-Component Extractants

Binary Extractant Systems

Multi-Component Custom Formulations

Market segment by Loading Capacity

Low Loading Capacity (<10 g/L Metal Loading)

Medium Loading Capacity (10-30 g/L Metal Loading)

High Loading Capacity (>30 g/L Metal Loading)

Others

Market segment by Application

Power Battery Recycling

Energy Storage Battery Recycling

Consumer Electronics Battery Recycling

Mixed Black Mass (Multi-source) Recycling

Pre-consumer / Manufacturing Scrap Recycling

Others

Major players covered

Syensqo

BASF SE

Clariant AG

Dow Inc.

LANXESS AG

Sunresin New Materials Co., Ltd.

Zhengzhou Meiya Chemical Products Co., Ltd.

Kopper Chemical Industry Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Extractants for Battery Recycling product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Extractants for Battery Recycling, with price, sales quantity, revenue, and global market share of Extractants for Battery Recycling from 2021 to 2026.

Chapter 3, the Extractants for Battery Recycling competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Extractants for Battery Recycling breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Target Metal and by Application, with sales market share and growth rate by Target Metal, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Extractants for Battery Recycling market forecast, by regions, by Target Metal, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Extractants for Battery Recycling.

Chapter 14 and 15, to describe Extractants for Battery Recycling sales channel, distributors, customers, research findings and conclusion.

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