

Global Hydrometallurgy Recycled Battery Black Mass Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hydrometallurgy Recycled Battery Black Mass market size is expected to reach \$ 3341 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

Hydrometallurgy Recycled Battery Black Mass refers to the mixed cathode and anode active-material powder obtained from spent lithium batteries and production scrap after discharge, dismantling, crushing, thermal treatment, and multi-stage physical separation, with casings, separators, copper and aluminum current collectors removed. Compared with general lithium battery recycled black powder, this product definition places greater emphasis on feedstock suitability for hydrometallurgical recovery, controllable metal composition, impurity reduction, lithium, nickel, cobalt, manganese, iron phosphate active-material enrichment, and efficient downstream leaching and purification. In 2025, the industry's capacity utilization rate reached 73%, and the average gross margin was around 50%. In 2025, production was about 610,000 tons and the average price was USD 2,300 per ton. The upstream segment mainly consists of specialized battery recycling equipment manufacturers, with representative suppliers including STEINERT, Batrium, Zhejiang Tianchang Intelligent Manufacturing Co., Ltd., and Brunp Recycling Equipment Division. The midstream segment focuses on black mass preparation, composition adjustment, and deep impurity removal, covering core processes such as fine crushing, pyrolysis, screening, magnetic separation, metal-element enrichment, and hydrometallurgical pre-treatment control. Downstream, the product is mainly used in regenerated cathode material manufacturing for power batteries and energy storage batteries, with typical customers including CATL, BYD, LG Energy Solution, and Tesla.

Hydrometallurgy Recycled Battery Black Mass will be priced around its ability to enter

chemical refining rather than simple physical recycling. For NCM feedstock, the value comes from recovering nickel, cobalt, manganese, and lithium into battery-grade salts and precursor materials; for LFP feedstock, lithium yield and processing cost become the core variables. As power batteries and energy storage batteries enter larger retirement cycles, downstream users will pay more attention to metal content, impurity levels, moisture control, and stable batch quality. The competitive threshold will move toward leaching efficiency, purification economics, environmental compliance, and long-term supply contracts with cathode-material producers.

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

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

Highlights and key features of the study

Global Hydrometallurgy Recycled Battery Black Mass total production and demand, 2021-2032, (Tons)

Global Hydrometallurgy Recycled Battery Black Mass total production value, 2021-2032, (USD Million)

Global Hydrometallurgy Recycled Battery Black Mass production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Hydrometallurgy Recycled Battery Black Mass consumption by region & country, CAGR, 2021-2032 & (Tons)

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

Global Hydrometallurgy Recycled Battery Black Mass production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Hydrometallurgy Recycled Battery Black Mass production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Hydrometallurgy Recycled Battery Black Mass production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Hydrometallurgy Recycled Battery Black Mass 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 Brunp Recycling (China), GEM (China), Umicore (Belgium), Redwood Materials (USA), Huayou Cobalt (China), SungEel HiTech (South Korea), POSCO HY Clean Metal (South Korea), Hydrovolt (Norway), Ascend Elements (USA), Cirba Solutions (USA), 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 Hydrometallurgy Recycled Battery Black Mass 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 Hydrometallurgy Recycled Battery Black Mass Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hydrometallurgy Recycled Battery Black Mass Market, Segmentation by Type:

Ternary Lithium Cathode

LiFePO₄ Cathode

Others

Global Hydrometallurgy Recycled Battery Black Mass Market, Segmentation by Technology:

Acid-Leaching

Bioleaching

Global Hydrometallurgy Recycled Battery Black Mass Market, Segmentation by Content:

2.0%?Li?3.50%

Li?3.5%

Others

Global Hydrometallurgy Recycled Battery Black Mass Market, Segmentation by Application:

Power Battery

Consumer Electronics Battery

Energy Storage Battery

Others

Companies Profiled:

Brunp Recycling (China)

GEM (China)

Umicore (Belgium)

Redwood Materials (USA)

Huayou Cobalt (China)

SungEel HiTech (South Korea)

POSCO HY Clean Metal (South Korea)

Hydrovolt (Norway)

Ascend Elements (USA)

Cirba Solutions (USA)

Ecobat (USA)

Fortum Battery Solutions (Finland)

Duesenfeld (Germany)

Key Questions Answered:

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

5. Who are the key producers in the global Hydrometallurgy Recycled Battery Black Mass market?
6. What are the growth factors driving the market demand?

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