

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market size is expected to reach \$ 213 million by 2032, rising at a market growth of 13.7% CAGR during the forecast period (2026-2032).

Impurity removal and purification reagents for lithium ion battery black mass leachate are physical chemical materials used in the hydrometallurgical recycling of spent lithium ion battery black mass to remove impurities, purify metal bearing solutions, and control metal ion composition before downstream recovery. The product focuses on purification steps after black mass leaching and before solvent extraction, lithium precipitation, precursor regeneration, iron phosphate recovery, or battery grade salt production. Main product forms include liquid formulated reagents, powder precipitation reagents, chelating agents, fluorine removal reagents, copper removal reagents, iron and aluminum removal reagents, ion exchange resins, chelating resins, and adsorption based purification materials. The core technical routes include precipitation purification, complexation precipitation, ion exchange, selective adsorption, pre extraction purification, and pH controlled impurity removal. Key specifications include target impurity removal efficiency, lithium nickel cobalt manganese loss rate, ion exchange capacity, selectivity coefficient, acid resistance, residual impurity concentration, filtration behavior, regeneration performance, and batch to batch stability. The product is mainly used in lithium iron phosphate black mass, nickel cobalt manganese black mass, nickel cobalt aluminum black mass, and mixed battery black mass recycling processes, where aluminum, iron, copper, fluorine, calcium, magnesium, heavy metals, and other interfering ions must be controlled to meet downstream material purity requirements. In 2025, the global average gross margin of impurity removal and purification reagents for lithium ion battery black mass leachate was 32.00%. In 2025, the global industry

average price was 3500 USD per ton.

Impurity removal and purification reagents for lithium ion battery black mass leachate represent a specialized chemical materials segment created by the shift from low value battery recycling toward battery grade material regeneration. The upstream supply chain consists of resin monomers, functionalized polymer intermediates, organophosphorus extraction intermediates, inorganic salts, chelating agents, fluorine removal materials, and other fine chemical additives. The midstream segment covers the production of ion exchange resins, chelating resins, adsorption materials, impurity precipitation reagents, copper removal reagents, fluorine and aluminum removal reagents, and formulated purification packages. The downstream demand base is formed by lithium iron phosphate black mass recyclers, nickel cobalt manganese black mass refiners, mixed black mass hydrometallurgical plants, lithium salt producers, and precursor regeneration companies. The product is not a single standardized commodity, but a group of process critical purification materials used to improve downstream purity, reduce valuable metal losses, and stabilize hydrometallurgical operations.

The competitive landscape is still fragmented. High end resin and extraction material suppliers compete through selectivity, acid resistance, regeneration performance, impurity capture efficiency, and compatibility with lithium nickel cobalt manganese recovery systems. Regional reagent suppliers compete through cost, customization, rapid formulation, and the ability to solve specific impurity problems such as fluorine, aluminum, copper, iron, calcium, magnesium, and heavy metals in different black mass streams. The market remains less transparent than established solvent extraction chemicals because many recycling plants use internally developed recipes, engineering package chemicals, or customer specific purification systems. This means that the actual supply base is broader than the list of companies with public product pages, while the number of clearly verifiable independent manufacturers remains limited.

Policy and supply chain changes are making this segment more relevant. The European battery regulatory framework sets staged recovery targets for key metals from waste batteries, including lithium recovery targets by 2027 and 2031, which supports higher purity recycling processes and stronger demand for purification materials. China is also moving toward more formal black mass import and quality control rules, which may increase the volume of tradable black mass entering hydrometallurgical refining. These developments support medium term growth, especially as lithium iron phosphate battery retirement increases and regional recycling capacity expands. The main risks are boundary dilution from commodity acids and alkalis, internal reagent formulations used by large recyclers, direct recycling routes that reduce hydrometallurgical steps, and

price pressure from local formulators.

This report studies the global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Impurity Removal and Purification Reagents for Lithium-ion 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 Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate total production and demand, 2021-2032, (Tons)

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate total production value, 2021-2032, (USD Million)

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate domestic production, consumption, key domestic manufacturers and share

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Impurity Removal and Purification Reagents for Lithium-ion 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 LANXESS AG, Purolite, Sunresin New Materials Co., Ltd., Syensqo, Kopper Chemical Industry Corp., Ltd., BASF SE, DuPont de Nemours, Inc., Mitsubishi Chemical Corporation, Solvay S.A., 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 Impurity Removal and Purification Reagents for Lithium-ion 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 Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market, Segmentation by Type:

Copper Removal Reagents

Aluminum Removal Reagents

Fluorine Removal Reagents

Heavy Metal Removal Reagents

Comprehensive Impurity Removal Reagents

Others

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market, Segmentation by Technology Route:

Chemical Precipitation

Ion Exchange

Chelation Precipitation

Adsorption Separation

Solvent Extraction Pre-treatment

Complexation-pH Synergistic Control

Others

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market, Segmentation by Black Mass Source:

LFP Black Mass Purification Reagents

NCA Black Mass Purification Reagents

LCO Black Mass Purification Reagents

Others

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market, Segmentation by Application:

Battery Grade Lithium Salt Production

Nickel Cobalt Manganese Salt Recovery

Precursor Regeneration

Iron Phosphate Regeneration

Solvent Extraction Feed Purification

Wastewater and Mother Liquor Purification

Others

Companies Profiled:

LANXESS AG

Purolite

Sunresin New Materials Co., Ltd.

Syensqo

Kopper Chemical Industry Corp., Ltd.

BASF SE

DuPont de Nemours, Inc.

Mitsubishi Chemical Corporation

Solvay S.A.

Key Questions Answered:

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

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