

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

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Abstracts

The global NCM Recycled Battery Black Mass market size is expected to reach \$ 2090 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

NCM Recycled Battery Black Mass refers to the black powdered active material rich in metallic elements such as nickel, cobalt, manganese, lithium, and graphite carbon, obtained after preprocessing steps including discharge, crushing, pyrolysis, and physical separation to remove battery casings, separators, and copper/aluminum foil current collectors from spent nickel-cobalt-manganese lithium-ion batteries. It serves as a key intermediate product connecting physical dismantling and chemical extraction in the lithium-battery recycling value chain, and it is the core raw material for hydrometallurgical recovery of battery-grade metal salts. The upstream segment mainly consists of equipment providers such as Dalan Environmental Protection, JieBang Precision, and Tianqi Shares, which supply core crushing, sorting, and pyrolysis equipment and are responsible for collecting and dismantling end-of-life batteries to produce black mass. The midstream segment represents the core of recycling and regeneration, utilizing hydrometallurgy and fine-purification technologies, such as those from Sunresin New Materials Co., Ltd. (Blue-Star), to efficiently extract, purify, and synthesize battery-grade ternary precursors or cathode materials from the black mass. The downstream application directly supplies power and energy-storage battery manufacturers, including CATL, Gotion High-tech, CALB, and EVE Energy, where the regenerated materials are used to manufacture new power batteries and energy-storage products, thereby forming an industrial closed loop of battery production, use, collection, recycling, and remanufacturing. In 2025, the average gross margin was approximately 48%, and the capacity utilization rate was about 71%. The production volume in 2025 reached around 135,000 tons, with an average price of USD 6,500 per

ton.

NCM Recycled Battery Black Mass will be positioned as a strategic secondary resource rather than a simple recycling intermediate. Its demand will be supported by retired electric vehicle batteries and cathode production scrap, because nickel, cobalt, lithium, and manganese recovery has clear material value. Applications will concentrate on hydrometallurgical refining, battery-grade metal salts, cathode precursor production, and closed-loop supply for battery makers. Compared with LFP black mass, the commercial model is more sensitive to metal prices, impurity control, and recovery yield. Suppliers with stable feedstock sourcing, traceable recycling channels, high metal recovery efficiency, and battery-material qualification capability will have stronger bargaining power.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

Global NCM Recycled Battery Black Mass production by Application, production, value,

CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global NCM 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 NCM 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 NCM Recycled Battery Black Mass Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

NCM523

NCM622

Others

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

Pyrometallurgical Smelting

Hydrometallurgical Recovery

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

Li?4%

Li?4%

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

Power 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 NCM Recycled Battery Black Mass market?
2. What is the demand of the global NCM Recycled Battery Black Mass market?
3. What is the year over year growth of the global NCM Recycled Battery Black Mass market?
4. What is the production and production value of the global NCM Recycled Battery Black Mass market?
5. Who are the key producers in the global NCM Recycled Battery Black Mass market?
6. What are the growth factors driving the market demand?

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