

Electric Vehicle Battery Recycling Market Report by Type (Lithium-ion, Lead-acid, and Others), Process (Hydrometallurgical, Pyro-metallurgical, and Others), Vehicle Type (Passenger Cars, Commercial Vehicles), Application (Electric Cars, Electric Buses, Energy Storage Systems, and Others), and Region 2024-2032

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Abstracts

The global electric vehicle battery recycling market size reached US\$ 2.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 22.2 Billion by 2032, exhibiting a growth rate (CAGR) of 24.9% during 2024-2032. The increasing adoption of electric vehicles (EVs), growing consumer awareness towards sustainability, extensive research and development (R&D) activities, and the imposition of stringent government regulations are some of the major factors propelling the market.

Electric vehicle (EV) battery recycling refers to the process of recovering valuable materials from used or end-of-life electric vehicle batteries. It involves multiple steps, including battery collection, sorting and testing, refurbishment, disassembly, shredding, chemical recovery, and material purification. EV battery recycling is widely used in battery manufacturing, energy storage, second-life applications, consumer electronics, and resource conservation. It allows efficient recovery and reuse of valuable materials and minimizes the environmental impact associated with raw material extraction. EV battery recycling also aids in saving costs, improving energy efficiency, and promoting sustainable practices.

The imposition of stringent regulations by several governments to minimize carbon emissions and promote a circular economy is facilitating the process demand, as it aids in minimizing waste, conserving resources, and reducing the ecological impact of

battery production and disposal. Furthermore, the increasing process utilization to enable efficient recovery and reuse of scarce resources, such as lithium, cobalt, and nickel, is contributing to the market growth. Additionally, the growing emphasis on sustainable supply chain management has prompted battery manufacturers and automakers to incorporate recycled materials in the production of new batteries, which is further catalyzing the market growth. Other factors, including rising scarcity of resources, increasing investment in the development of advanced recycling methods, and growing awareness regarding the benefits of EV battery recycling, are anticipated to drive the market growth.

Electric Vehicle Battery Recycling Market Trends/Drivers:

The increasing adoption of electric vehicles (EVs)

EV batteries contain valuable and scarce resources such as lithium, cobalt, nickel, and other metals. As the demand for EVs rises, the availability of these resources becomes critical. EV battery recycling enables the recovery and reuse of these valuable materials, thus reducing the dependence on primary mining activities. Furthermore, EV battery recycling contributes to the security and stability of the battery supply chain, which reduces the vulnerability of the EV industry. Additionally, it offers potential cost savings for automotive manufacturers, making EVs more affordable and competitive in the market. Moreover, proper recycling and disposal of the batteries assist in preventing environmental pollution and promoting a circular economy.

The growing consumer awareness towards sustainability

EV battery recycling contributes to the conservation of valuable resources, such as lithium, cobalt, nickel, and other metals, which are essential components of EV batteries. This conservation supports a more sustainable and responsible approach to resource management. Furthermore, EV battery recycling aids in minimizing waste generation by ensuring that batteries are properly managed, and valuable materials are recovered. Along with this, it contributes to the circular economy by closing the loop on battery materials and minimizing the need for new resource extraction. Additionally, EV battery recycling plays a crucial role in protecting the environment by preventing the release of hazardous substances into the soil and water, leading to pollution and ecological damage. It also indirectly contributes to carbon footprint reduction by minimizing the energy and emissions associated with battery production.

Extensive research and development (R&D) activities

The recent development of direct cathode recycling methods, which focuses on recycling the cathode materials directly from spent EV batteries, thus saving costs, simplifying the recycling process, and eliminating the need for extensive battery disassembly, is contributing to the market growth. Furthermore, the introduction of selective recovery processes, which enable targeted material extraction, improve resource efficiency, and reduce the environmental impact of recycling, is positively influencing the market growth. Additionally, the utilization of machine vision, robotics, and artificial intelligence (AI) to improve efficiency, enhance worker safety, and enable sorting and separation of battery components is strengthening the market growth. Moreover, the development of electrochemical and pyrometallurgical methods that enhance extraction efficiency, reduce energy requirements, and optimize material recovery rates are propelling the market growth.

Electric Vehicle Battery Recycling Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, process, vehicle type, and application.

Breakup by Type:

Lithium-ion

Lead-acid

Others

Lithium-ion dominates the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes lithium-ion, lead-acid, and others. According to the report, lithium-ion represented the largest market segment.

Lithium-ion batteries are dominating the market as they are widely used in electric vehicles (EVs) owing to their high energy density, long cycle life, and excellent power-to-weight ratio. Furthermore, the increasing volume of end-of-life lithium-ion batteries is creating a strong demand for recycling services specifically tailored to this battery chemistry. Additionally, lithium-ion batteries contain valuable resources, including lithium, cobalt, nickel, and other metals that are in high demand for the production of new batteries, consumer electronics, and renewable energy storage. Moreover, the recent advancements in sorting, disassembly, and material recovery techniques have

made it increasingly efficient and economically viable to recycle lithium-ion batteries, which is further driving the market growth. Apart from this, the presence of a well-established recycling infrastructure for lithium-ion batteries is acting as another growth-inducing factor.

Breakup by Process:

Hydrometallurgical

Pyro-metallurgical

Others

Hydrometallurgical dominates the market

The report has provided a detailed breakup and analysis of the market based on the process. This includes hydrometallurgical, pyro-metallurgical, and others. According to the report, hydrometallurgical represented the largest market segment.

Hydrometallurgical processes offer efficient extraction of valuable metals from EV batteries. These processes involve the use of aqueous solutions, such as acids or leaching agents, to dissolve the metals present in the batteries. Furthermore, it is a highly versatile process that can be applied to multiple battery chemistries, including lithium-ion (Li-ion) batteries, thus contributing to the market growth. Additionally, the hydrometallurgical process is effective in recovering valuable metals, such as cobalt, lithium, nickel, and manganese, from EV batteries that are essential for the production of new batteries and have significant economic value. Moreover, it is considered an environmentally friendly process as it involves milder reaction conditions, lower energy consumption, and reduced emissions of greenhouse gases (GHGs). Apart from this, hydrometallurgical processes provide excellent selectivity for recovering specific metals from batteries, which aids in maximizing resource efficiency and purity of the recovered metals.

Breakup by Vehicle Type:

Passenger Cars

Commercial Vehicles

The report has provided a detailed breakup and analysis of the market based on the vehicle type. This includes passenger cars and commercial vehicles.

Passenger cars are widely used by consumers, which leads to a larger volume of passenger car batteries reaching the end of their life cycle and entering the recycling market. Furthermore, passenger car owners often replace their vehicles within a shorter time frame to maintain the efficiency and mileage of the car, which is further driving the market growth. Additionally, the rising demand for new models of passenger cars among consumers is acting as another growth-inducing factor.

Commercial vehicles are extensively used, covering longer distances and operating for extended periods. This leads to faster depletion of battery capacity and a shorter lifespan for commercial vehicle batteries. As a result, they require battery replacements more frequently, leading to a higher recycling rate. Furthermore, commercial vehicles are operated in fleets, managed by transit agencies, logistics companies, or businesses, which enables more streamlined battery collection and recycling processes.

Breakup by Application:

Electric Cars

Electric Buses

Energy Storage Systems

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes electric cars, electric buses, energy storage systems, and others.

Electric cars have achieved significant market penetration and are increasingly popular among consumers, which is contributing to a higher volume of electric vehicle batteries reaching the end of their life cycle. Furthermore, the imposition of strict government regulations to encourage the recycling and responsible disposal of electric vehicle batteries is positively influencing the market growth. Additionally, the rapid development of infrastructure for collecting, handling, and recycling electric car batteries is acting as another growth-inducing factor.

Electric buses are equipped with larger battery packs compared to passenger electric cars, which translates to a higher volume of batteries being recycled when electric buses reach the end of their life cycle. Furthermore, they are widely used in public transportation systems and have higher mileage compared to passenger electric cars. This intensive use results in a faster depletion of battery capacity which further increases the need for replacements, which is acting as another growth-inducing factor.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance in the market, accounting for the largest electric vehicle battery recycling market share

The report has also provided a comprehensive analysis of all the major regional markets, which includes North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market segment.

The Asia Pacific region holds the majority of the market share as it has witnessed significant growth in the adoption of electric vehicles (EVs). Furthermore, it is a major

hub for battery production, with several leading battery manufacturers located in the region. This proximity to battery manufacturers enables efficient collection and recycling of batteries, reducing logistical challenges and costs. Additionally, Asia Pacific is at the forefront of developing and implementing advanced recycling technologies for lithium-ion batteries, which is further strengthening its dominance in the market. Moreover, the imposition of favorable policies by the regional governments to mandate the responsible management and recycling of end-of-life batteries is contributing to the market growth. Apart from this, easy access to the raw materials required for battery production and recycling, such as lithium, cobalt, and nickel, is favoring the market growth.

Competitive Landscape:

The leading companies in the market are investing in research and development to advance recycling technologies and processes. They are focusing on improving the efficiency, cost-effectiveness, and environmental sustainability of EV battery recycling. Furthermore, several key players are forming partnerships with battery manufacturers, automakers, and other stakeholders in the EV industry to establish a reliable supply chain and gain continuous access to end-of-life batteries. Additionally, companies are expanding their operations and presence in different regions to tap into emerging opportunities and cater to the growing demand for EV battery recycling services across the globe. Moreover, top companies are implementing eco-friendly processes, reducing waste generation, and ensuring compliance with environmental regulations to strengthen their market presence and gain advantages over competitors.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

ACCUREC-Recycling GmbH
American Manganese Inc.
Battery Solutions
G & P Batteries Limited
Li-Cycle Corp.
Retriev Technologies
SITRASA
SNAM Groupe (Floridienne)
TES-Amm
Umicore N.V.

Recent Developments:

In December 2022, ACCUREC-Recycling GmbH announced that it has developed a new process to recycle lithium from old batteries.

In October 2022, American Manganese Inc. announced the change of its name to RecycLiCo Battery Materials Inc., to better reflect its core competencies and mission in lithium-ion battery recycling-upcycling technologies.

In April 2023, Li-Cycle Corp. signed a definitive agreement with VinES Energy Solutions to expand Li-ion battery recycling capacity.

Key Questions Answered in This Report

1. What was the size of the global electric vehicle battery recycling market in 2023?
2. What is the expected growth rate of the global electric vehicle battery recycling market during 2024-2032?
3. What are the key factors driving the global electric vehicle battery recycling market?
4. What has been the impact of COVID-19 on the global electric vehicle battery recycling market?
5. What is the breakup of the global electric vehicle battery recycling market based on the type?
6. What is the breakup of the global electric vehicle battery recycling market based on the process?
7. What are the key regions in the global electric vehicle battery recycling market?
8. Who are the key players/companies in the global electric vehicle battery recycling market?

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