

Global Extractants for Battery Recycling Market Growth 2026-2032

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Abstracts

The global Extractants for Battery Recycling market size is predicted to grow from US\$ 110 million in 2025 to US\$ 295 million in 2032; it is expected to grow at a CAGR of 15.4% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the "Extractants for Battery Recycling Industry Forecast" looks at past sales and reviews total world Extractants for Battery Recycling sales in 2025, providing a comprehensive analysis by region and market sector of projected Extractants for Battery Recycling sales for 2026 through 2032. With Extractants for Battery Recycling sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Extractants for Battery Recycling industry.

This Insight Report provides a comprehensive analysis of the global Extractants for Battery Recycling landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Extractants for Battery Recycling portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Extractants for Battery Recycling market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Extractants for Battery Recycling and breaks down the forecast by Target Metal, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of

bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Extractants for Battery Recycling.

This report presents a comprehensive overview, market shares, and growth opportunities of Extractants for Battery Recycling market by product type, application, key manufacturers and key regions and countries.

Segmentation by Target Metal:

Lithium Recovery Extractants

Nickel Recovery Extractants

Cobalt Recovery Extractants

Manganese Recovery Extractants

Copper Recovery Extractants

Multi-metal Recovery Systems

Others

Segmentation by Complexity:

Single-Component Extractants

Binary Extractant Systems

Multi-Component Custom Formulations

Segmentation by Loading Capacity:

Low Loading Capacity (30 g/L Metal Loading)

Others

Segmentation 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

This report also splits the market by region:

Americas

- United States

- Canada

- Mexico

- Brazil

APAC

- China

- Japan

- Korea

- Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Extractants for Battery Recycling market?

What factors are driving Extractants for Battery Recycling market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Extractants for Battery Recycling market opportunities vary by end market size?

How does Extractants for Battery Recycling break out by Target Metal, by Application?

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