

Global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate Market Growth 2026-2032

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Abstracts

The global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market size is predicted to grow from US\$ 76.30 million in 2025 to US\$ 212 million in 2032; it is expected to grow at a CAGR of 14.5% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate 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 Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate and breaks down the forecast by Type, 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 Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate.

This report presents a comprehensive overview, market shares, and growth opportunities of Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Copper Removal Reagents

Aluminum Removal Reagents

Fluorine Removal Reagents

Heavy Metal Removal Reagents

Comprehensive Impurity Removal Reagents

Others

Segmentation by Technology Route:

Chemical Precipitation

Ion Exchange

Chelation Precipitation

Adsorption Separation

Solvent Extraction Pre-treatment

Complexation-pH Synergistic Control

Others

Segmentation by Black Mass Source:

LFP Black Mass Purification Reagents

NCA Black Mass Purification Reagents

LCO Black Mass Purification Reagents

Others

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

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.

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 Addressed in this Report

What is the 10-year outlook for the global Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market?

What factors are driving Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market growth, globally and by region?

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

How do Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate market opportunities vary by end market size?

How does Impurity Removal and Purification Reagents for Lithium-ion Battery Black Mass Leachate break out by Type, by Application?

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