

# **Battery Manufacturing Scrap Recycling Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Scrap Source (Automotive Batteries, Industrial Batteries, Consumer Electronics Batteries, Others), By Recycling Technology (Hydrometallurgy, Pyrometallurgy, Others), By Application (Automotive, Electronics, Energy and Power, Aerospace and Defense, Construction, Others), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Battery Manufacturing Scrap Recycling Market was valued at USD 1.94 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.14% through 2029. The Global Battery Manufacturing Scrap Recycling Market is a dynamic sector driven by the increasing demand for sustainable and efficient battery solutions across various industries. With the rise in electric vehicles (EVs), renewable energy systems, and portable electronic devices, there's a corresponding surge in the consumption of batteries, leading to a proportional increase in battery waste. This market segment focuses on recycling scrap generated during battery manufacturing processes, offering a sustainable solution to minimize environmental impact and maximize resource utilization. Key players in this market are continuously innovating to develop advanced recycling technologies that efficiently extract valuable materials such as lithium, cobalt, nickel, and other metals from spent batteries. These recovered materials are then repurposed for the production of new batteries or other industrial applications, reducing the dependency on primary raw materials and mitigating the environmental footprint associated with traditional mining and refining processes.

Stringent regulations and environmental policies worldwide are further propelling the growth of the battery manufacturing scrap recycling market, as governments and regulatory bodies emphasize the importance of responsible waste management and circular economy practices. The market is characterized by a competitive landscape with numerous players offering a range of recycling services and technologies tailored to meet the diverse needs of battery manufacturers and end-users. As the demand for sustainable energy storage solutions continues to escalate, the Global Battery Manufacturing Scrap Recycling Market is poised for significant expansion, driven by technological advancements, regulatory frameworks, and growing environmental consciousness among consumers and businesses alike.

## Key Market Drivers

### Increasing Demand for Electric Vehicles (EVs) and Energy Storage Systems

The increasing demand for electric vehicles (EVs) and energy storage systems is being driven by several factors, including efforts to mitigate climate change, reduce air pollution, and decrease dependence on fossil fuels. Governments around the world are implementing policies to incentivize the adoption of EVs, such as subsidies, tax credits, and emissions regulations. Similarly, the rapid expansion of renewable energy sources, such as solar and wind power, has created a need for efficient energy storage solutions to address intermittency issues and maximize the utilization of renewable energy resources.

As a result, the global market for lithium-ion batteries, which are commonly used in EVs and energy storage systems, has experienced exponential growth. However, this growth has also led to a corresponding increase in battery waste generated at various stages of the battery lifecycle, including manufacturing, usage, and disposal. The disposal of spent batteries in landfills poses environmental risks due to the potential leakage of hazardous materials into soil and water bodies, as well as the loss of valuable resources contained within the batteries. To address these challenges, the recycling of battery manufacturing scrap has emerged as a sustainable solution to minimize waste and recover valuable materials for reuse. Recycling not only reduces the environmental impact of battery production and disposal but also helps alleviate the pressure on primary resources by reintroducing recovered materials back into the supply chain. Recycling batteries can also contribute to the circular economy by promoting resource efficiency and reducing reliance on finite resources. The increasing demand for EVs and energy storage systems is driving growth in the battery manufacturing scrap recycling market, as stakeholders recognize the importance of

sustainable practices in supporting the transition towards a low-carbon future.

## Growing Awareness of Environmental Sustainability

The growing awareness of environmental sustainability has permeated various sectors of society, driving a paradigm shift towards more responsible and eco-friendly practices. With increasing concerns over climate change, pollution, and resource depletion, individuals, businesses, and governments are recognizing the urgent need to prioritize sustainability in their operations. In particular, the environmental impact of battery manufacturing and disposal has come under scrutiny due to the proliferation of battery-powered devices, electric vehicles (EVs), and renewable energy systems.

Battery manufacturing processes often involve the extraction of raw materials such as lithium, cobalt, and nickel, which can have significant environmental consequences, including habitat destruction, water pollution, and greenhouse gas emissions. The disposal of spent batteries, if not managed properly, can pose serious environmental hazards due to the leakage of toxic substances into the soil and water.

In response to these challenges, there is a growing emphasis on implementing sustainable practices throughout the battery lifecycle, from production to end-of-life management. Recycling battery manufacturing scrap plays a crucial role in this endeavor by reducing the need for virgin raw materials, minimizing energy consumption, and diverting waste from landfills. By recovering valuable materials from spent batteries, such as lithium, cobalt, and nickel, recycling not only conserves natural resources but also reduces the environmental impact associated with mining and refining processes.

Recycling batteries promotes the circular economy by closing the loop and reintroducing recovered materials back into the production cycle. This not only conserves resources but also reduces greenhouse gas emissions and minimizes the overall environmental footprint of battery manufacturing. As awareness of these environmental benefits continues to grow, stakeholders across industries are increasingly embracing battery manufacturing scrap recycling as a fundamental component of their sustainability strategies, driving further growth in the market.

## Key Market Challenges

### Regulatory Complexities and Compliance Requirements

The complexity of regulatory frameworks governing battery manufacturing scrap

recycling extends beyond mere compliance with local laws; it encompasses a labyrinth of standards, permits, and targets that vary significantly across different jurisdictions. Companies operating in this market must contend with a myriad of regulations related to waste management, environmental protection, and occupational health and safety. From securing permits for waste handling and transportation to obtaining licenses for recycling facilities, the regulatory burden can be overwhelming and resource-intensive. Meeting recycling targets set by regulatory bodies adds another layer of complexity, requiring meticulous planning and execution to ensure compliance.

Regulatory uncertainties and inconsistencies across regions pose significant challenges for market players. Varying interpretations of regulations, conflicting requirements, and jurisdictional discrepancies can create ambiguity and confusion, hindering investment decisions and market expansion efforts. To navigate this regulatory maze effectively, stakeholders advocate for harmonization of regulations and the development of clear, consistent frameworks that provide clarity and stability for the industry. Such efforts would not only streamline compliance efforts but also foster a conducive regulatory environment that supports and incentivizes battery recycling initiatives on a global scale. Ultimately, regulatory harmonization is essential for unlocking the full potential of battery recycling and promoting a sustainable, circular economy.

### Collection and Logistics Challenges

The challenge of efficient collection and logistics in battery recycling programs is multifaceted and requires comprehensive solutions to overcome. Establishing a robust collection network involves addressing logistical complexities and cost considerations associated with recovering spent batteries from diverse sources. This includes developing collection infrastructure capable of handling various types of batteries, from small household batteries to large industrial batteries used in electric vehicles and energy storage systems. Coordinating collection efforts across different sectors, such as households, businesses, and electronic waste (e-waste) recycling facilities, requires effective communication and collaboration among stakeholders.

Ensuring the safe transportation and handling of potentially hazardous battery materials presents another significant challenge in the logistics chain. Batteries contain toxic substances and flammable materials that pose risks to human health and the environment if not handled properly. Therefore, implementing strict safety protocols, training personnel in hazardous materials handling, and using specialized packaging and transportation methods are essential to mitigate risks and ensure compliance with regulations.

Limited public awareness and participation in battery recycling programs hinder collection efforts. Many consumers are unaware of the importance of battery recycling or may lack convenient options for disposing of their used batteries properly. Therefore, raising awareness about the benefits of battery recycling and providing convenient collection points, such as drop-off locations at retail stores or community centers, are crucial strategies for increasing participation rates.

## Key Market Trends

### Stringent Regulations and Recycling Mandates

The global surge in battery consumption has prompted governments worldwide to implement stringent regulations and recycling mandates to tackle the mounting challenge of battery waste. Recognizing the environmental hazards posed by improper disposal and the potential for resource scarcity, policymakers are enacting laws aimed at promoting responsible waste management practices and conserving valuable resources. These regulations span a spectrum of measures, from setting recycling targets to imposing strict environmental standards on battery manufacturing and disposal processes.

In many jurisdictions, battery manufacturers are subject to recycling mandates that require them to collect and recycle a certain percentage of the batteries they produce. These mandates incentivize investment in recycling infrastructure and technology, driving innovation in battery recycling processes. Governments may impose penalties on non-compliant companies, further motivating industry players to prioritize recycling efforts. Environmental standards play a crucial role in shaping the regulatory landscape of the battery manufacturing scrap recycling market. Governments set limits on the permissible levels of hazardous substances in batteries and require manufacturers to adhere to strict guidelines for the handling, storage, and disposal of battery waste. Compliance with these standards is not only essential for environmental protection but also for safeguarding public health and safety.

As a result of these regulations and recycling mandates, the battery manufacturing scrap recycling market is experiencing significant growth as companies strive to meet regulatory requirements and avoid penalties. The demand for recycling services and technologies is on the rise, spurring investment in advanced recycling infrastructure and driving innovation in recycling processes. As environmental awareness continues to grow, governments are likely to introduce even stricter regulations in the future, further

fueling the expansion of the battery manufacturing scrap recycling market.

### Technological Advancements in Recycling Processes

Technological advancements in recycling processes have revolutionized the landscape of battery manufacturing scrap recycling, driving greater efficiency, sustainability, and resource recovery. One of the most significant innovations in battery recycling is the development of hydrometallurgical processes, which involve the use of aqueous solutions to dissolve and recover valuable metals from spent batteries. These processes offer high selectivity and efficiency, allowing for the recovery of metals such as lithium, cobalt, nickel, and manganese with minimal waste generation.

Pyrometallurgical processes have also seen notable advancements, leveraging high temperatures to smelt and separate metals from battery scrap. These processes are particularly effective for recovering metals with high melting points, such as cobalt and nickel, and can handle a wide range of battery chemistries and compositions. Advancements in thermal treatment technologies, such as rotary kilns and electric arc furnaces, have improved energy efficiency and reduced emissions, making pyrometallurgical recycling more environmentally sustainable.

Mechanical shredding and separation techniques have also undergone significant improvements, enabling the efficient disassembly and sorting of battery components. High-speed shredders and screening systems can effectively shred batteries into smaller particles, while advanced sorting technologies, such as magnetic separators, eddy current separators, and optical sorters, enable the precise separation of different materials based on their magnetic, electrical, or optical properties.

These technological advancements not only enhance the economics of battery recycling but also enable the recovery of a wider range of materials, including rare earth metals and other valuable elements. By extracting and recycling these materials from spent batteries, recycling processes contribute to resource conservation and reduce the reliance on primary raw materials, thus promoting sustainability and circularity in the battery industry.

Ongoing research and development efforts are focused on further improving recycling technologies, enhancing process efficiency, and reducing environmental impact. Emerging technologies, such as electrochemical recycling and biotechnological approaches, hold promise for unlocking new pathways for battery recycling and maximizing resource recovery. As technological advancements continue to drive



innovation in recycling processes, the battery manufacturing scrap recycling market is poised for continued growth, offering sustainable solutions to meet the increasing demand for battery materials in a rapidly evolving energy landscape.

## Segmental Insights

### Scrap Source Insights

Based on the Scrap Source, in 2023, the automotive batteries segment emerged as the dominant segment in the Global Battery Manufacturing Scrap Recycling Market. The rapid growth of the electric vehicle (EV) market played a significant role in boosting the demand for automotive battery recycling. As the adoption of EVs continues to soar globally, the volume of end-of-life automotive batteries entering the recycling stream has increased substantially. Recycling these batteries is essential not only to recover valuable materials but also to manage the environmental impact of battery disposal.

Regulatory pressures and sustainability initiatives have further fueled the demand for automotive battery recycling. Governments and regulatory bodies worldwide have introduced stringent regulations and recycling mandates to address the environmental challenges associated with battery waste. Compliance with these regulations has become a priority for automotive manufacturers, driving investment in recycling infrastructure and processes. Advancements in recycling technologies have made automotive battery recycling more economically viable and efficient.

### Recycling Technology Insights

Based on the recycling technology, in 2023, in the Global Battery Manufacturing Scrap Recycling Market, pyrometallurgy emerged as the dominant segment. Pyrometallurgy offers significant advantages in terms of scalability and versatility. Pyrometallurgical processes involve high-temperature treatments, such as smelting and roasting, which are well-suited for handling large volumes of battery scrap and various types of battery chemistries. This scalability makes pyrometallurgy an attractive option for recycling facilities seeking to process bulk quantities of battery waste efficiently.

Pyrometallurgical processes are known for their ability to recover a wide range of metals from battery scrap, including cobalt, nickel, and copper, among others. These processes are particularly effective in extracting metals with high melting points, such as cobalt and nickel, which are essential components of lithium-ion batteries used in electric vehicles and energy storage systems. Pyrometallurgy offers cost advantages

compared to other recycling technologies, such as hydrometallurgy. Pyrometallurgical processes typically require lower capital investment and operational costs, making them a more economically viable option for battery recycling facilities.

## Regional Insights

In 2023, Asia-Pacific emerged as the dominant region in the Global Battery Manufacturing Scrap Recycling Market, holding the largest market share. Asia-Pacific is home to some of the largest producers and consumers of batteries globally, particularly in countries such as China, Japan, and South Korea. These countries have witnessed rapid industrialization, urbanization, and technological advancements, leading to increased demand for batteries across various sectors, including automotive, electronics, energy storage, and consumer goods. As a result, the volume of battery manufacturing scrap generated in the region has surged, driving the demand for recycling solutions.

Asia-Pacific benefits from a robust ecosystem of recycling facilities, research institutions, and industry players, facilitating innovation and technology development in battery recycling. Advancements in recycling technologies, such as pyrometallurgy and hydrometallurgy, have enhanced the efficiency and effectiveness of battery recycling processes, making them more economically viable and environmentally sustainable.

## Key Market Players

Fortum Group

Guangdong Brunp Recycling Technology Co., Ltd.

Hydrovolt

Umicore

Li-Cycle Corp.

BASF SE

Tenova S.p.A.

Duesenfeld GmbH



Aqua Metals, Inc

Green Li-ion Pte Ltd

### Report Scope:

In this report, the Global Battery Manufacturing Scrap Recycling Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Battery Manufacturing Scrap Recycling Market, By Scrap Source:

Automotive Batteries

Industrial Batteries

Consumer Electronics Batteries

Others

#### Battery Manufacturing Scrap Recycling Market, By Recycling Technology:

Hydrometallurgy

Pyrometallurgy

Others

#### Battery Manufacturing Scrap Recycling Market, By Application:

Automotive

Electronics

Energy and Power

Aerospace and Defense

Construction

Others

Battery Manufacturing Scrap Recycling Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Battery Manufacturing Scrap Recycling Market.

## Available Customizations:

Global Battery Manufacturing Scrap Recycling market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Scrap Source (Automotive Batteries, Industrial Batteries, Consumer Electronics Batteries, Others)
  - 5.2.2. By Recycling Technology (Hydrometallurgy, Pyrometallurgy, Others)

5.2.3. By Application (Automotive, Electronics, Energy and Power, Aerospace and Defense, Construction, Others)

5.2.4. By Company (2023)

5.2.5. By Region

5.3. Market Map

## **6. NORTH AMERICA BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Scrap Source

6.2.2. By Recycling Technology

6.2.3. By Application

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Battery Manufacturing Scrap Recycling Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Scrap Source

6.3.1.2.2. By Recycling Technology

6.3.1.2.3. By Application

6.3.2. Mexico Battery Manufacturing Scrap Recycling Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Scrap Source

6.3.2.2.2. By Recycling Technology

6.3.2.2.3. By Application

6.3.3. Canada Battery Manufacturing Scrap Recycling Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Scrap Source

6.3.3.2.2. By Recycling Technology

6.3.3.2.3. By Application

## **7. EUROPE BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Scrap Source

#### 7.2.2. By Recycling Technology

#### 7.2.3. By Application

#### 7.2.4. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. France Battery Manufacturing Scrap Recycling Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Scrap Source

###### 7.3.1.2.2. By Recycling Technology

###### 7.3.1.2.3. By Application

#### 7.3.2. Germany Battery Manufacturing Scrap Recycling Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Scrap Source

###### 7.3.2.2.2. By Recycling Technology

###### 7.3.2.2.3. By Application

#### 7.3.3. United Kingdom Battery Manufacturing Scrap Recycling Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Scrap Source

###### 7.3.3.2.2. By Recycling Technology

###### 7.3.3.2.3. By Application

#### 7.3.4. Italy Battery Manufacturing Scrap Recycling Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

##### 7.3.4.2. Market Share & Forecast

###### 7.3.4.2.1. By Scrap Source

###### 7.3.4.2.2. By Recycling Technology

###### 7.3.4.2.3. By Application



### 7.3.5. Spain Battery Manufacturing Scrap Recycling Market Outlook

#### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Scrap Source

##### 7.3.5.2.2. By Recycling Technology

##### 7.3.5.2.3. By Application

## **8. ASIA-PACIFIC BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Scrap Source

#### 8.2.2. By Recycling Technology

#### 8.2.3. By Application

#### 8.2.4. By Country

### 8.3. Asia-Pacific: Country Analysis

#### 8.3.1. China Battery Manufacturing Scrap Recycling Market Outlook

##### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Scrap Source

##### 8.3.1.2.2. By Recycling Technology

##### 8.3.1.2.3. By Application

#### 8.3.2. India Battery Manufacturing Scrap Recycling Market Outlook

##### 8.3.2.1. Market Size & Forecast

##### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

##### 8.3.2.2.1. By Scrap Source

##### 8.3.2.2.2. By Recycling Technology

##### 8.3.2.2.3. By Application

#### 8.3.3. South Korea Battery Manufacturing Scrap Recycling Market Outlook

##### 8.3.3.1. Market Size & Forecast

##### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

##### 8.3.3.2.1. By Scrap Source

##### 8.3.3.2.2. By Recycling Technology

- 8.3.3.2.3. By Application
- 8.3.4. Japan Battery Manufacturing Scrap Recycling Market Outlook
  - 8.3.4.1. Market Size & Forecast
    - 8.3.4.1.1. By Value
  - 8.3.4.2. Market Share & Forecast
    - 8.3.4.2.1. By Scrap Source
    - 8.3.4.2.2. By Recycling Technology
    - 8.3.4.2.3. By Application
- 8.3.5. Australia Battery Manufacturing Scrap Recycling Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Scrap Source
    - 8.3.5.2.2. By Recycling Technology
    - 8.3.5.2.3. By Application

## **9. SOUTH AMERICA BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Scrap Source
  - 9.2.2. By Recycling Technology
  - 9.2.3. By Application
  - 9.2.4. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Battery Manufacturing Scrap Recycling Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Scrap Source
      - 9.3.1.2.2. By Recycling Technology
      - 9.3.1.2.3. By Application
  - 9.3.2. Argentina Battery Manufacturing Scrap Recycling Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Scrap Source

- 9.3.2.2.2. By Recycling Technology
- 9.3.2.2.3. By Application
- 9.3.3. Colombia Battery Manufacturing Scrap Recycling Market Outlook
  - 9.3.3.1. Market Size & Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share & Forecast
    - 9.3.3.2.1. By Scrap Source
    - 9.3.3.2.2. By Recycling Technology
    - 9.3.3.2.3. By Application

## **10. MIDDLE EAST AND AFRICA BATTERY MANUFACTURING SCRAP RECYCLING MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Scrap Source
  - 10.2.2. By Recycling Technology
  - 10.2.3. By Application
  - 10.2.4. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa Battery Manufacturing Scrap Recycling Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Scrap Source
      - 10.3.1.2.2. By Recycling Technology
      - 10.3.1.2.3. By Application
  - 10.3.2. Saudi Arabia Battery Manufacturing Scrap Recycling Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Scrap Source
      - 10.3.2.2.2. By Recycling Technology
      - 10.3.2.2.3. By Application
  - 10.3.3. UAE Battery Manufacturing Scrap Recycling Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast

- 10.3.3.2.1. By Scrap Source
- 10.3.3.2.2. By Recycling Technology
- 10.3.3.2.3. By Application

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. PORTERS FIVE FORCES ANALYSIS**

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

## **14. COMPETITIVE LANDSCAPE**

- 14.1. Fortum Group
  - 14.1.1. Business Overview
  - 14.1.2. Company Snapshot
  - 14.1.3. Products & Services
  - 14.1.4. Financials (As Reported)
  - 14.1.5. Recent Developments
  - 14.1.6. Key Personnel Details
  - 14.1.7. SWOT Analysis
- 14.2. Guangdong Brunp Recycling Technology Co., Ltd.
- 14.3. Hydrovolt
- 14.4. Umicore
- 14.5. Li-Cycle Corp.
- 14.6. BASF SE
- 14.7. Tenova S.p.A.

14.8. Duesenfeld GmbH

14.9. Aqua Metals, Inc

14.10. Green Li-ion Pte Ltd.

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**

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