

Europe Battery Recycling Market Forecast 2026-2034

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Report description:**KEY FINDINGS**

The Europe battery recycling market size is set to be valued at \$5490.23 million as of 2026 and is expected to reach \$11987.86 million by 2034, progressing with a CAGR of 10.25% during the forecasting years, 2026-2034.

MARKET INSIGHTS

The Europe battery recycling market demonstrates accelerated growth propelled by comprehensive regulatory frameworks and ambitious circular economy targets. The European Commission published new rules in July 2025 for waste batteries that calculate and verify rates of recycling efficiency and recovery of materials, with provisions implemented in stages from August 2024 onwards. These regulations establish stringent extended producer responsibility requirements across all member states.

Additionally, European automotive manufacturers embrace these regulations as opportunities to secure sustainable supply chains. Major OEMs, including Volkswagen, BMW, and Mercedes-Benz, establish strategic recycling partnerships to ensure compliant material sourcing. The combination of regulatory pressure and supply chain security concerns accelerates regional recycling capacity expansion.

REGIONAL ANALYSIS

The Europe battery recycling market growth assessment includes the analysis of the United Kingdom, Germany, France, Italy, Spain, Belgium, Poland, and Rest of Europe.

The United Kingdom develops battery recycling infrastructure aligned with post-Brexit industrial strategy and net-zero emission commitments. The government introduced the Zero-Emission Vehicle mandate requiring automakers to ensure specific percentages of annual production consist of zero-emission vehicles. By 2030, 80% of new cars and 70% of vans sold must be zero emissions, transitioning fully by 2035. This policy drives substantial EV adoption while creating future recycling feedstock volumes.

British recycling companies collaborate with automotive manufacturers to establish collection networks through dealership service centers. Extended producer responsibility schemes require battery producers to finance take-back and recycling programs. The Department for Business and Trade supports innovation through research grants and tax incentives for advanced recycling technologies. Universities partner with industry to develop direct recycling methods, preserving cathode material structures.

These collaborations advance technical capabilities while training a skilled workforce for emerging recycling sectors.

Furthermore, the UK emphasizes domestic processing capacity to reduce material export dependencies. Regional development programs target manufacturing regions transitioning from traditional automotive to electric vehicle industries. Investment flows

into facilities capable of processing both production scrap and end-of-life batteries. However, the UK market faces challenges from limited domestic battery cell production compared to continental Europe. Most recycling feedstock originates from imported EV batteries or consumer electronics. Strategic partnerships with European recyclers enable cross-border material flows, optimizing regional processing capacities.

Germany commands Europe's largest battery recycling market through established automotive industry strength and comprehensive regulatory implementation. The abrupt removal of government subsidies for EV purchases at the end of 2023 had a pronounced negative impact on German EV sales in 2024. Despite this temporary setback, long-term electrification commitments remain unchanged. Major automotive manufacturers, including Volkswagen, BMW, and Mercedes-Benz, invest heavily in domestic recycling infrastructure.

In November 2024, BMW announced a pan-European partnership with SK tes, leveraging a special recycling process that recovers cobalt, nickel, and lithium from used batteries, reintegrating them into new battery production. This closed-loop system will expand to the US-Mexico-Canada region by 2026. German recycling facilities emphasize hydrometallurgical processing, achieving superior material purity compared to pyrometallurgical approaches.

Companies operate under strict environmental regulations requiring comprehensive emissions controls and wastewater treatment. The Federal Ministry for Economic Affairs and Climate Action provides funding for pilot projects demonstrating innovative recycling technologies. Research institutions, including Fraunhofer ISI, develop direct recycling methods applicable to LFP and NMC cathode chemistries. Additionally, Germany's central European location enables efficient material flows from neighboring countries.

Collection networks aggregate batteries from across the continent for processing at large-scale German facilities. These plants benefit from economies of scale while serving pan-European automotive supply chains. Industry associations coordinate standardization efforts, improving battery design for recyclability. Modular architectures and standardized connections facilitate faster disassembly, reducing processing costs. Furthermore, German recyclers supply recovered materials to domestic cathode manufacturers, supporting vertical integration strategies.

In February 2024, Volkswagen Group UK expanded its partnership with Ecobat to recycle EV batteries, with Ecobat collecting and processing high-voltage batteries at its new UK lithium-ion recycling center, its third globally after Germany and Arizona. France implements rigorous battery collection targets through producer responsibility organizations coordinating nationwide take-back programs. The country reduced EV purchase subsidies progressively over recent years while maintaining support for lower-income buyers. French automotive manufacturers, including Renault and Stellantis, develop proprietary recycling capabilities. These companies establish facilities that process their own battery technologies, optimizing material recovery from familiar chemistries. Italy and Spain expand recycling infrastructure driven by growing EV adoption and EU regulatory compliance requirements.

Southern European countries benefit from renewable energy advantages, reducing recycling operational costs. Belgium hosts specialized recycling operations leveraging its strategic port locations for international material flows. Poland attracts recycling investments through competitive labor costs and proximity to Central European automotive manufacturing clusters. Eastern European expansion enables cost-effective processing while serving regional battery collection networks. Across all markets, harmonized EU regulations create consistent operating standards facilitating cross-border business development.

SEGMENTATION ANALYSIS

The Europe battery recycling market is segmented into chemistry, application, recycling process, and source. The application segment is further categorized into transportation, consumer electronics, industrial, and other applications.

The transportation application segment dominates European battery recycling volumes, driven by accelerating electric vehicle fleet growth across the continent. Europe saw sales stagnate in 2024 as subsidy schemes waned, but the sales share of electric cars remained around 20%. Despite temporary slowdowns, cumulative EV populations continue expanding significantly. These vehicles eventually require battery replacement or reach end-of-life, creating substantial recycling feedstock.

Automotive batteries contain the highest concentrations of valuable materials per unit compared to consumer electronics or industrial applications. A single EV battery pack weighs 300-500 kilograms with lithium-ion cells comprising approximately 60% of total mass. Therefore, transportation batteries generate superior economics for recycling operators. Collection infrastructure integrates with authorized dealership networks where vehicle owners return batteries during service visits. Automakers implement take-back obligations ensuring systematic recovery of automotive batteries.

Extended producer responsibility regulations hold vehicle manufacturers accountable for end-of-life battery management. This framework creates predictable material flows, enabling recyclers to plan capacity investments confidently. Moreover, warranty programs capture early battery failures before they enter informal recycling channels. Manufacturing scrap from European gigafactories supplements end-of-life volumes during market development phases. Facilities processing automotive batteries invest in specialized equipment for handling large-format cells safely.

Discharge procedures and thermal management systems prevent safety incidents during initial processing stages. Subsequently, mechanical shredding and sorting separate valuable components from housing materials and cooling systems. The resulting black mass contains concentrated cathode and anode materials ready for chemical extraction. European regulations mandate specific recovery rates, creating quality standards for recycled materials. Consequently, transportation battery recycling achieves premium pricing compared to consumer electronics processing.

COMPETITIVE INSIGHTS

Some of the top players operating in the Europe battery recycling market include Umicore, Fortum, Northvolt, Ecobat, etc. Umicore operates as a global materials technology and recycling company headquartered in Brussels, Belgium, specializing in sustainable chemistry and circular economy solutions. The company maintains extensive expertise in precious metal refining and battery material recycling spanning multiple decades. Umicore's battery recycling division processes lithium-ion, lithium-polymer, and nickel-metal hydride batteries from automotive, industrial, and consumer electronics sources.

The company offers recycling services catering to chemical, electric, electronic, automotive, and special glass industries, with operations in 30 countries and 14 research and development centers emphasizing innovation in recycling technologies. Their Belgian facility represents one of Europe's largest hydrometallurgical recycling plants with 7,000 tonnes annual processing capacity.

Further, the company emphasizes carbon-neutral processing methods, differentiating its offerings in environmentally conscious European markets. Strategic partnerships with major automotive OEMs secure long-term feedstock supplies and material offtake agreements. Additionally, Umicore invests in research and developing next-generation recycling technologies applicable to emerging battery chemistries. Their geographic network enables efficient material collection across European markets while serving global automotive customers.

COMPANY PROFILES

1. [ACCUREC RECYCLING GMBH](#)
2. [AQUA METALS INC](#)
3. [BATTERY RECYCLING MADE EASY LLC](#)
4. [BATTERY SOLUTIONS INC](#)
5. [CALL2RECYCLE INC](#)
6. [ECO-BAT TECHNOLOGIES LTD](#)
7. [EXIDE TECHNOLOGIES](#)
8. [NEOMETALS LTD](#)
9. [RAW MATERIALS COMPANY](#)
10. [RECUPYL SAS](#)
11. [RECYLEX SA](#)
12. [THE DOE RUN RESOURCES CORPORATION](#)
13. [UMICORE SA](#)
14. [GS YUASA CORPORATION](#)
15. [RETRIEV TECHNOLOGIES INC](#)

Table of Contents:

TABLE OF CONTENTS

1. [RESEARCH SCOPE & METHODOLOGY](#)
 - 1.1. [STUDY OBJECTIVES](#)
 - 1.2. [METHODOLOGY](#)

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- 1.3. ASSUMPTIONS & LIMITATIONS
- 2. EXECUTIVE SUMMARY
- 2.1. MARKET SIZE & FORECAST
- 2.2. MARKET OVERVIEW
- 2.3. SCOPE OF STUDY
- 2.4. CRISIS SCENARIO ANALYSIS
- 2.5. MAJOR MARKET FINDINGS
 - 2.5.1. GLOBAL DEMAND FOR CRITICAL MINERALS IS DRIVING RAPID SCALE-UP OF LITHIUM-ION BATTERY RECYCLING CAPACITIES
 - 2.5.2. EV ADOPTION IS ACCELERATING THE FLOW OF END-OF-LIFE BATTERIES ENTERING COMMERCIAL RECYCLING STREAMS
 - 2.5.3. ADVANCED HYDROMETALLURGICAL PROCESSES ARE EMERGING AS THE MOST EFFICIENT ROUTE FOR LITHIUM AND COBALT RECOVERY
 - 2.5.4. STRONG GOVERNMENT MANDATES IN EUROPE AND ASIA ARE PUSHING OEMS TOWARD CIRCULAR BATTERY SUPPLY CHAINS
- 3. MARKET DYNAMICS
 - 3.1. KEY DRIVERS
 - 3.1.1. RISING EV SALES ARE INCREASING THE VOLUME OF SPENT LITHIUM-ION BATTERIES REQUIRING SUSTAINABLE RECYCLING
 - 3.1.2. GLOBAL CRITICAL MINERAL SHORTAGES ARE BOOSTING DEMAND FOR HIGH-PURITY RECOVERED MATERIALS
 - 3.1.3. REGULATORY PRESSURE FOR EXTENDED PRODUCER RESPONSIBILITY IS EXPANDING FORMAL RECYCLING NETWORKS
 - 3.1.4. TECHNOLOGICAL ADVANCEMENTS ARE REDUCING PROCESSING COSTS AND IMPROVING MATERIAL RECOVERY RATES
 - 3.2. KEY RESTRAINTS
 - 3.2.1. LIMITED COLLECTION INFRASTRUCTURE REDUCES THE EFFECTIVENESS OF NATIONAL RECYCLING PROGRAMS
 - 3.2.2. HIGH CAPITAL COSTS FOR ADVANCED RECYCLING FACILITIES DELAY NEW PROJECT DEVELOPMENT
 - 3.2.3. LACK OF STANDARDIZED BATTERY DESIGN MAKES DISASSEMBLY AND MATERIAL RECOVERY LABOR INTENSIVE
 - 3.2.4. LOW COMMODITY PRICES CAN REDUCE THE ECONOMIC VIABILITY OF RECYCLING OPERATIONS
- 4. KEY ANALYTICS
 - 4.1. KEY MARKET TRENDS
 - 4.1.1. HYDROMETALLURGY AND DIRECT RECYCLING ARE EMERGING AS THE FASTEST-GROWING PROCESS TECHNOLOGIES
 - 4.1.2. GLOBAL OEMS ARE FORMING CLOSED-LOOP PARTNERSHIPS WITH SPECIALIZED RECYCLERS TO SECURE MATERIAL SUPPLY
 - 4.1.3. SECOND-LIFE APPLICATIONS ARE DELAYING RECYCLING FLOWS BY EXTENDING BATTERY USAGE IN ENERGY STORAGE
 - 4.1.4. DIGITAL TRACKING SYSTEMS ARE BEING INTRODUCED TO IMPROVE TRACEABILITY OF BATTERIES THROUGH THE RECYCLING CHAIN
 - 4.2. PORTER'S FIVE FORCES ANALYSIS
 - 4.2.1. BUYERS POWER
 - 4.2.2. SUPPLIERS POWER
 - 4.2.3. SUBSTITUTION
 - 4.2.4. NEW ENTRANTS
 - 4.2.5. INDUSTRY RIVALRY
 - 4.3. GROWTH PROSPECT MAPPING
 - 4.3.1. GROWTH PROSPECT MAPPING FOR EUROPE
 - 4.4. MARKET MATURITY ANALYSIS
 - 4.5. MARKET CONCENTRATION ANALYSIS
 - 4.6. VALUE CHAIN ANALYSIS
 - 4.6.1. BATTERY COLLECTION
 - 4.6.2. LOGISTICS HANDLING
 - 4.6.3. DISASSEMBLY OPERATIONS
 - 4.6.4. CHEMICAL PROCESSING
 - 4.6.5. MATERIAL SEPARATION
 - 4.6.6. REFINED OUTPUTS

- 4.6.7. OEM REINTEGRATION
- 4.7. KEY BUYING CRITERIA
- 4.7.1. RECOVERY EFFICIENCY
- 4.7.2. PROCESS COSTS
- 4.7.3. REGULATORY COMPLIANCE
- 4.7.4. MATERIAL PURITY
- 4.8. REGULATORY FRAMEWORK
- 5. BATTERY RECYCLING MARKET BY CHEMISTRY
 - 5.1. LEAD-ACID
 - 5.1.1. MARKET FORECAST FIGURE
 - 5.1.2. SEGMENT ANALYSIS
 - 5.2. NICKEL-BASED
 - 5.2.1. MARKET FORECAST FIGURE
 - 5.2.2. SEGMENT ANALYSIS
 - 5.3. LITHIUM-BASED
 - 5.3.1. MARKET FORECAST FIGURE
 - 5.3.2. SEGMENT ANALYSIS
 - 5.4. OTHERS
 - 5.4.1. MARKET FORECAST FIGURE
 - 5.4.2. SEGMENT ANALYSIS
- 6. BATTERY RECYCLING MARKET BY APPLICATION
 - 6.1. TRANSPORTATION
 - 6.1.1. MARKET FORECAST FIGURE
 - 6.1.2. SEGMENT ANALYSIS
 - 6.2. CONSUMER ELECTRONICS
 - 6.2.1. MARKET FORECAST FIGURE
 - 6.2.2. SEGMENT ANALYSIS
 - 6.3. INDUSTRIAL
 - 6.3.1. MARKET FORECAST FIGURE
 - 6.3.2. SEGMENT ANALYSIS
 - 6.4. OTHER APPLICATIONS
 - 6.4.1. MARKET FORECAST FIGURE
 - 6.4.2. SEGMENT ANALYSIS
- 7. BATTERY RECYCLING MARKET BY RECYCLING PROCESS
 - 7.1. HYDROMETALLURGY
 - 7.1.1. MARKET FORECAST FIGURE
 - 7.1.2. SEGMENT ANALYSIS
 - 7.2. PYROMETALLURGY
 - 7.2.1. MARKET FORECAST FIGURE
 - 7.2.2. SEGMENT ANALYSIS
 - 7.3. LEAD ACID BATTERY RECYCLING PROCESS
 - 7.3.1. MARKET FORECAST FIGURE
 - 7.3.2. SEGMENT ANALYSIS
 - 7.4. LITHIUM-ION BATTERY RECYCLING PROCESS
 - 7.4.1. MARKET FORECAST FIGURE
 - 7.4.2. SEGMENT ANALYSIS
- 8. BATTERY RECYCLING MARKET BY SOURCE

- 8.1. AUTOMOTIVE BATTERIES
- 8.1.1. MARKET FORECAST FIGURE
- 8.1.2. SEGMENT ANALYSIS
- 8.2. INDUSTRIAL BATTERIES
- 8.2.1. MARKET FORECAST FIGURE
- 8.2.2. SEGMENT ANALYSIS
- 8.3. CONSUMER ELECTRONICS
- 8.3.1. MARKET FORECAST FIGURE
- 8.3.2. SEGMENT ANALYSIS
- 9. GEOGRAPHICAL ANALYSIS
- 9.1. EUROPE
- 9.1.1. MARKET SIZE & ESTIMATES
- 9.1.2. EUROPE MARKET DRIVERS
- 9.1.3. EUROPE BATTERY RECYCLING MARKET CHALLENGES
- 9.1.4. KEY PLAYERS IN EUROPE BATTERY RECYCLING MARKET
- 9.1.5. COUNTRY ANALYSIS
- 9.1.5.1. GERMANY
- 9.1.5.1.1. GERMANY MARKET SIZE & OPPORTUNITIES
- 9.1.5.2. UNITED KINGDOM
- 9.1.5.2.1. UNITED KINGDOM MARKET SIZE & OPPORTUNITIES
- 9.1.5.3. FRANCE
- 9.1.5.3.1. FRANCE MARKET SIZE & OPPORTUNITIES
- 9.1.5.4. ITALY
- 9.1.5.4.1. ITALY MARKET SIZE & OPPORTUNITIES
- 9.1.5.5. SPAIN
- 9.1.5.5.1. SPAIN MARKET SIZE & OPPORTUNITIES
- 9.1.5.6. BELGIUM
- 9.1.5.6.1. BELGIUM MARKET SIZE & OPPORTUNITIES
- 9.1.5.7. POLAND
- 9.1.5.7.1. POLAND MARKET SIZE & OPPORTUNITIES
- 9.1.5.8. REST OF EUROPE
- 9.1.5.8.1. REST OF EUROPE MARKET SIZE & OPPORTUNITIES
- 10. COMPETITIVE LANDSCAPE
- 10.1. KEY STRATEGIC DEVELOPMENTS
- 10.1.1. MERGERS & ACQUISITIONS
- 10.1.2. PRODUCT LAUNCHES & DEVELOPMENTS
- 10.1.3. PARTNERSHIPS & AGREEMENTS
- 10.1.4. BUSINESS EXPANSIONS & DIVESTITURES
- 10.2. COMPANY PROFILES
- 10.2.1. ACCUREC RECYCLING GMBH
- 10.2.1.1. COMPANY OVERVIEW
- 10.2.1.2. PRODUCTS
- 10.2.1.3. STRENGTHS & CHALLENGES
- 10.2.2. AQUA METALS INC
- 10.2.2.1. COMPANY OVERVIEW
- 10.2.2.2. PRODUCTS
- 10.2.2.3. STRENGTHS & CHALLENGES

10.2.3. BATTERY RECYCLING MADE EASY LLC

10.2.3.1. COMPANY OVERVIEW

10.2.3.2. PRODUCTS

10.2.3.3. STRENGTHS & CHALLENGES

10.2.4. BATTERY SOLUTIONS INC

10.2.4.1. COMPANY OVERVIEW

10.2.4.2. PRODUCTS

10.2.4.3. STRENGTHS & CHALLENGES

10.2.5. CALL2RECYCLE INC

10.2.5.1. COMPANY OVERVIEW

10.2.5.2. PRODUCTS

10.2.5.3. STRENGTHS & CHALLENGES

10.2.6. ECO-BAT TECHNOLOGIES LTD

10.2.6.1. COMPANY OVERVIEW

10.2.6.2. PRODUCTS

10.2.6.3. STRENGTHS & CHALLENGES

10.2.7. EXIDE TECHNOLOGIES

10.2.7.1. COMPANY OVERVIEW

10.2.7.2. PRODUCTS

10.2.7.3. STRENGTHS & CHALLENGES

10.2.8. NEOMETALS LTD

10.2.8.1. COMPANY OVERVIEW

10.2.8.2. PRODUCTS

10.2.8.3. STRENGTHS & CHALLENGES

10.2.9. RAW MATERIALS COMPANY

10.2.9.1. COMPANY OVERVIEW

10.2.9.2. PRODUCTS

10.2.9.3. STRENGTHS & CHALLENGES

10.2.10. RECUPYL SAS

10.2.10.1. COMPANY OVERVIEW

10.2.10.2. PRODUCTS

10.2.10.3. STRENGTHS & CHALLENGES

10.2.11. RECYLEX SA

10.2.11.1. COMPANY OVERVIEW

10.2.11.2. PRODUCTS

10.2.11.3. STRENGTHS & CHALLENGES

10.2.12. THE DOE RUN RESOURCES CORPORATION

10.2.12.1. COMPANY OVERVIEW

10.2.12.2. PRODUCTS

10.2.12.3. STRENGTHS & CHALLENGES

10.2.13. UMICORE SA

10.2.13.1. COMPANY OVERVIEW

10.2.13.2. PRODUCTS

10.2.13.3. STRENGTHS & CHALLENGES

10.2.14. GS YUASA CORPORATION

10.2.14.1. COMPANY OVERVIEW

10.2.14.2. PRODUCTS

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10.2.14.3. STRENGTHS & CHALLENGES

10.2.15. RETRIEV TECHNOLOGIES INC

10.2.15.1. COMPANY OVERVIEW

10.2.15.2. PRODUCTS

10.2.15.3. STRENGTHS & CHALLENGES

LIST OF TABLES

TABLE 1: MARKET SNAPSHOT - BATTERY RECYCLING

TABLE 2: MARKET BY CHEMISTRY, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)

TABLE 3: MARKET BY CHEMISTRY, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)

TABLE 4: MARKET BY APPLICATION, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)

TABLE 5: MARKET BY APPLICATION, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)

TABLE 6: MARKET BY RECYCLING PROCESS, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)

TABLE 7: MARKET BY RECYCLING PROCESS, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)

TABLE 8: MARKET BY SOURCE, BY REGION, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)

TABLE 9: MARKET BY SOURCE, BY REGION, FORECAST YEARS, 2026-2034 (IN \$ MILLION)

TABLE 10: EUROPE MARKET, COUNTRY ANALYSIS, HISTORICAL YEARS, 2022-2024 (IN \$ MILLION)

TABLE 11: EUROPE MARKET, COUNTRY ANALYSIS, FORECAST YEARS, 2026-2034 (IN \$ MILLION)

TABLE 12: KEY PLAYERS OPERATING IN THE EUROPEAN MARKET

TABLE 13: LIST OF MERGERS & ACQUISITIONS

TABLE 14: LIST OF PRODUCT LAUNCHES & DEVELOPMENTS

TABLE 15: LIST OF PARTNERSHIPS & AGREEMENTS

TABLE 16: LIST OF BUSINESS EXPANSIONS & DIVESTITURES

LIST OF FIGURES

FIGURE 1: KEY MARKET TRENDS

FIGURE 2: PORTER'S FIVE FORCES ANALYSIS

FIGURE 3: GROWTH PROSPECT MAPPING FOR EUROPE

FIGURE 4: MARKET MATURITY ANALYSIS

FIGURE 5: MARKET CONCENTRATION ANALYSIS

FIGURE 6: VALUE CHAIN ANALYSIS

FIGURE 7: KEY BUYING CRITERIA

FIGURE 8: SEGMENT GROWTH POTENTIAL, BY CHEMISTRY, IN 2025

FIGURE 9: LEAD-ACID MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 10: NICKEL-BASED MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 11: LITHIUM-BASED MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 12: OTHERS CHEMISTRY MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 13: SEGMENT GROWTH POTENTIAL, BY APPLICATION, IN 2025

FIGURE 14: TRANSPORTATION MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 15: CONSUMER ELECTRONICS MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 16: INDUSTRIAL MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 17: OTHER APPLICATIONS MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 18: SEGMENT GROWTH POTENTIAL, BY RECYCLING PROCESS, IN 2025

FIGURE 19: HYDROMETALLURGY MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 20: PYROMETALLURGY MARKET SIZE, 2026-2034 (IN \$ MILLION)

FIGURE 21: LEAD-ACID BATTERY RECYCLING PROCESS MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 22: LITHIUM-ION BATTERY RECYCLING PROCESS MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 23: SEGMENT GROWTH POTENTIAL, BY SOURCE, IN 2025
FIGURE 24: AUTOMOTIVE BATTERIES MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 25: INDUSTRIAL BATTERIES MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 26: CONSUMER ELECTRONICS MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 27: EUROPE BATTERY RECYCLING MARKET, COUNTRY OUTLOOK, 2025 & 2034 (IN %)
FIGURE 28: GERMANY MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 29: UNITED KINGDOM MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 30: FRANCE MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 31: ITALY MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 32: SPAIN MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 33: BELGIUM MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 34: POLAND MARKET SIZE, 2026-2034 (IN \$ MILLION)
FIGURE 35: REST OF EUROPE MARKET SIZE, 2026-2034 (IN \$ MILLION)

Europe Battery Recycling Market Forecast 2026-2034

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