The Netherlands Battery Recycling Market Forecast 2026-2034

Market Report | 2026-01-19 | 135 pages | Inkwood Research

AVAILABLE LICENSES:

- Single User Price $1100.00
- Global Site License $1500.00

Report description:

KEY FINDINGS
The Netherlands battery recycling market size is set to be valued at $243.44 million as of 2026 and is expected to reach $586.21 million by 2034, progressing with a CAGR of 11.61% during the forecast years, 2026-2034.
MARKET INSIGHTS
The Netherlands battery recycling market demonstrates robust expansion driven by strategic positioning as a European logistics hub and accelerating electric vehicle deployment across urban centers. The Netherlands is seeing a steady rise in battery electric vehicle registrations. This growth trajectory creates substantial future recycling volumes as batteries reach end-of-life stages. Moreover, the country's advanced port infrastructure in Rotterdam and Amsterdam facilitates efficient battery collection and distribution networks throughout Europe. These strategic advantages enable Dutch recyclers to aggregate batteries from multiple countries for centralized processing.
Additionally, stringent EU regulations mandate minimum recycled content requirements, driving domestic capacity investments. By the end of 2025, manufacturers must recycle at least 65% of a battery's total weight, increasing to 70% by 2030. The Netherlands government supports circular economy initiatives through substantial subsidy programs. In April 2024, the government allocated USD 109 million in subsidies for battery storage installations alongside solar projects, part of a broader USD 453 million subsidy package.
Furthermore, Dutch research institutions collaborate with private companies to advance innovative recycling technologies. In January 2025, research organization TNO and company SusPhos plan to develop an economically viable recycling process for LFP batteries, aiming to recover critical materials such as lithium and phosphate in a profitable process. These public-private partnerships accelerate technology commercialization while reducing processing costs. Consequently, the Netherlands emerges as an attractive destination for recycling facility investments, combining regulatory certainty with innovation capabilities.
Dutch companies embrace closed-loop partnerships with automotive manufacturers, securing long-term material supply agreements. These collaborations guarantee feedstock availability while creating offtake certainties for recovered materials. Novocycle established a pilot recycling facility in South Limburg, uniquely positioned near the borders of Germany and Belgium, providing efficient access to key battery manufacturers and major European markets.
The region's commitment to sustainability and innovation makes it prime for business expansion, attracting investment and driving industry adoption. Traditional recycling methods rely on shredding and energy-intensive chemical processes, leading to waste and pollution. However, Novocycle's approach preserves high-purity cathode and anode materials, significantly reducing

environmental impact while maximizing recovery efficiency.
Currently, production residual materials from battery pack manufacturing represent the main recycling feedstock source. Therefore, recyclers establish facilities near manufacturing clusters, capturing scrap materials efficiently. Economic factors, including reduced inflation and rising wages, enhance consumer purchasing power, supporting increased EV investments. Government incentives for sustainable transportation, combined with ambitious emission reduction targets, drive market momentum.
However, the Netherlands continues to rely heavily on imports to meet growing battery demand. Strategic trade positions and advanced logistics infrastructure facilitate efficient import management. Nevertheless, this import dependence poses domestic manufacturing challenges, underscoring the need for strategic local production investments to ensure balanced supply chains.
SEGMENTATION ANALYSIS
The Netherlands battery recycling market is segmented into chemistry, application, recycling process, and source. The source segment is further categorized into automotive batteries, industrial batteries, and consumer electronics.
The industrial batteries source segment captures a significant market share, driven by the Netherlands' substantial renewable energy storage deployment and telecommunications infrastructure requirements. Industrial batteries power stationary applications, including uninterruptible power supply systems, telecommunications networks, and grid-scale energy storage facilities. In February 2024, RWE broke ground on the Netherlands' utility-scale battery storage project, boasting 35 megawatts of power capacity and 41 megawatt-hours storage capability, integrating 110 lithium-ion battery racks with operations set to commence by 2025. These large-scale installations generate substantial battery volumes requiring eventual recycling when capacity degrades.
Moreover, telecommunications operators maintain extensive backup power systems across the network infrastructure. These batteries operate continuously in float charge modes, experiencing gradual capacity loss over 5-10 year periods. Consequently, regular replacement cycles create predictable recycling flows. Dutch recyclers benefit from established collection relationships with industrial facility operators. Maintenance contracts include battery replacement and disposal services, ensuring systematic material recovery.
Additionally, industrial batteries typically possess standardized formats, simplifying disassembly and processing operations. Recycling facilities optimize workflows for common industrial battery configurations, achieving superior economics. The Netherlands' leadership in renewable energy integration drives energy storage system proliferation. Solar and wind power variability requires battery buffering for grid stability.
Therefore, utility-scale storage deployments are accelerating rapidly, supported by government subsidies. These installations deploy thousands of battery modules, creating concentrated recycling opportunities. Furthermore, second-life applications extend industrial battery usefulness before final recycling. Retired EV batteries suitable for stationary storage delay recycling flows while providing value. However, eventual processing requirements remain, creating deferred demand. Dutch companies develop expertise in managing both primary industrial batteries and second-life EV batteries repurposed for stationary applications.
COMPETITIVE INSIGHTS
Some of the top players operating in the Netherlands battery recycling market include Umicore, Ecobat Technologies, Auto Recycling Netherlands (ARN), Novocycle, etc.
Auto Recycling Netherlands (ARN) operates as the country's leading producer responsibility organization, managing end-of-life vehicle collection and recycling throughout the Netherlands. The organization coordinates nationwide networks connecting over 200 chain partners, including car dismantling companies, shredder facilities, and material recovery operators. ARN administers recycling fees for passenger vehicles while ensuring compliance with Dutch environmental regulations and EU directives.
The organization recently expanded services addressing electric vehicle battery management challenges. They operate comprehensive EV battery management programs enabling automotive importers to fulfill extended producer responsibility obligations. ARN coordinates safe collection, transportation, and processing of end-of-life EV batteries through certified partners. The organization maintains strict safety protocols addressing fire risks during battery handling and storage. Their network provides convenient drop-off locations enabling vehicle owners to dispose of end-of-life cars, including batteries, free of charge at nearby dismantling facilities.
ARN's business model emphasizes circular economy principles, recovering maximum value from automotive materials. The

organization facilitates material flows to specialized recyclers, ensuring batteries reach appropriate processing facilities. Furthermore, ARN invests in education programs training dismantlers on proper EV battery removal and handling procedures. This capacity building strengthens the Netherlands' recycling infrastructure capabilities. The organization's established relationships with automotive manufacturers and importers create comprehensive collection coverage across the country, ensuring systematic battery recovery and supporting circular supply chains.

COMPANY PROFILES

1. ACCUREC RECYCLING GMBH
2. ECO-BAT TECHNOLOGIES LTD
3. EXIDE TECHNOLOGIES
4. UMICORE SA
5. GS YUASA CORPORATION
6. AUTO RECYCLING NETHERLANDS (ARN
7. NOVOCYCLE

Table of Contents:

LIST OF TABLES

LIST OF FIGURES

SCOTTS INTERNATIONAL

The Netherlands Battery Recycling Market Forecast 2026-2034

Market Report | 2026-01-19 | 135 pages | Inkwood Research

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Price	$1100.00
	Global Site License	$1500.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-10
		Signature	