

Case Study

How We Helped a Global Client Identify High-Growth Opportunities in the **European EV Battery Recycling Ecosystem**



Objective

A global battery materials-focused organization sought a comprehensive understanding of the rapidly evolving battery recycling landscape in Europe, for which they collaborated with leB. The client's goal was to develop a clear, actionable understanding of market dynamics, key players, and strategic entry points in the region. They also expected to dive into competitive positioning, regional attractiveness, and partnership opportunities to enable long-term strategic alignment.

Our Strategic Approach

To translate a complex and fragmented ecosystem into a structured strategic roadmap, leB applied a multi-dimensional framework integrating ecosystem mapping, competitive benchmarking, value chain analysis, and partner identification.

Battery Recycling Landscape & Player Assessment

Evaluated the European battery recycling ecosystem by identifying key stakeholders across recyclers, OEMs, and Producer Responsibility Organizations (PROs). Assessed leading players based on their technological capabilities, operational scale, and strategic positioning within the market.

Competitive & Technology Positioning Analysis

Developed a benchmarking framework to compare players based on technology maturity, business strengths, and integration across the recycling value chain. Highlighted how different technologies, such as hydrometallurgical and pyrometallurgical processes, are shaping competitive advantage.

Value Chain & Regional Opportunity Analysis

Analyzed the battery recycling value chain across collection, pre-processing, and material recovery stages. Mapped regional dynamics across Europe to identify high-potential markets based on regulatory push, EV adoption, feedstock availability, and infrastructure readiness.

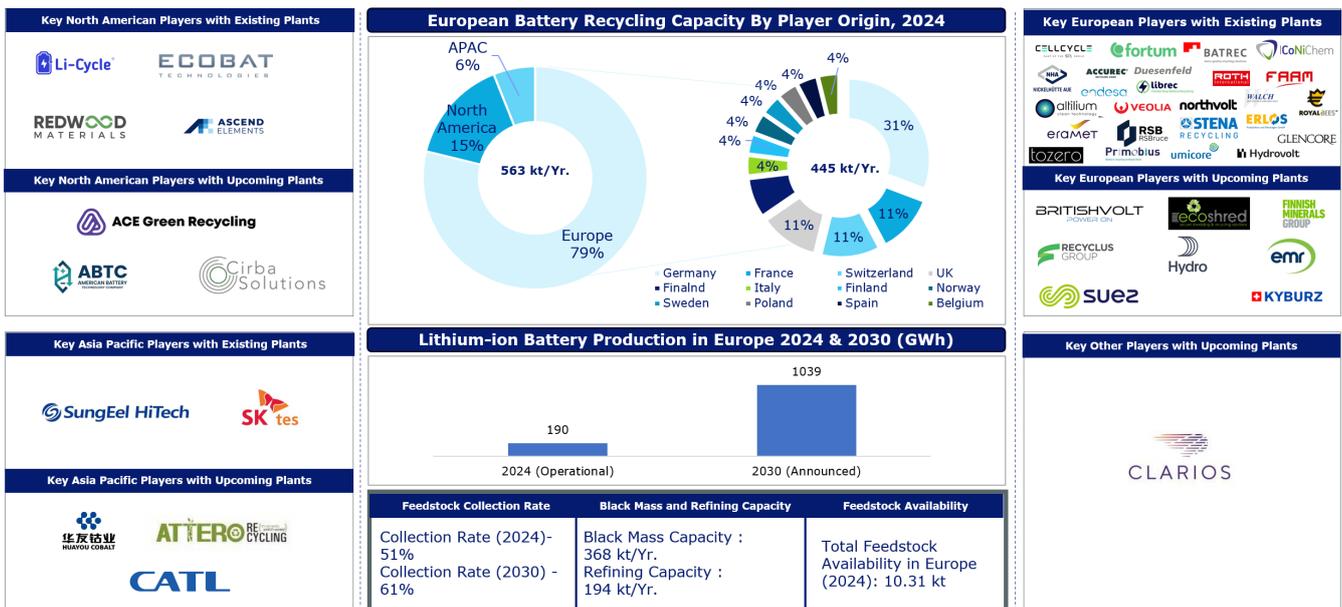
Partner Identification & Strategic Fit

Identified and evaluated potential partners aligned with the client's strategic objectives. Shortlisted best-fit partners based on technological compatibility, market presence, and long-term collaboration potential.

Snippets

Executive Briefings – Overall Recyclers Landscape

Analyst Commentary: Germany's leadership and Europe's self-sustained recycling industry are supported by strict regulations, a strong automotive and battery manufacturing sector, and efforts to reduce reliance on China; These factors will create a more efficient and independent recycling ecosystem in the region

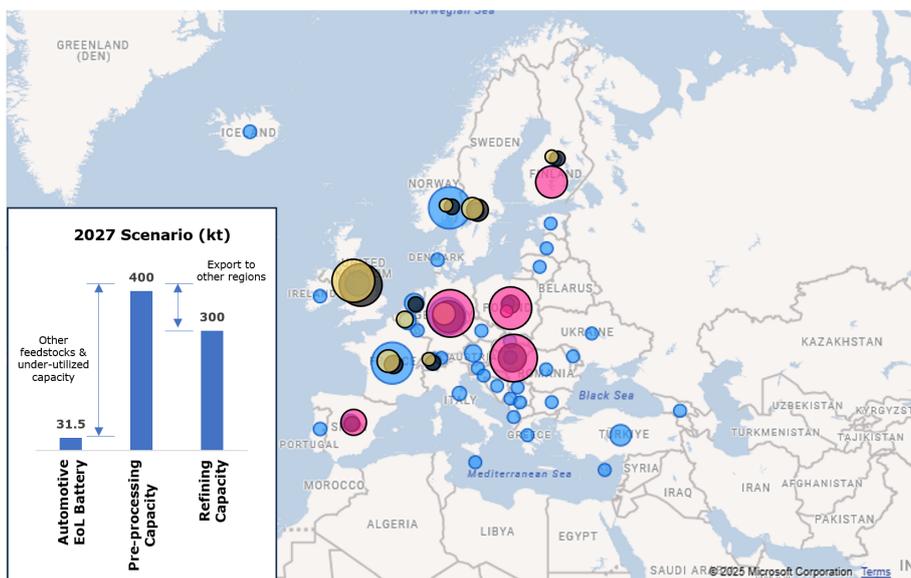


Source: IeB Analysis

IeB's Perspective – Country Assessment (2/2)

Analyst Commentary: By 2027, rising EoL battery volumes and local refining demand will reshape Europe's recycling landscape, requiring significant expansion of Spoke and pretreatment capacities; Key players are scaling up, though delays may impact Europe's closed-loop battery supply ambitions

Battery Supply Chain in Europe - 2027



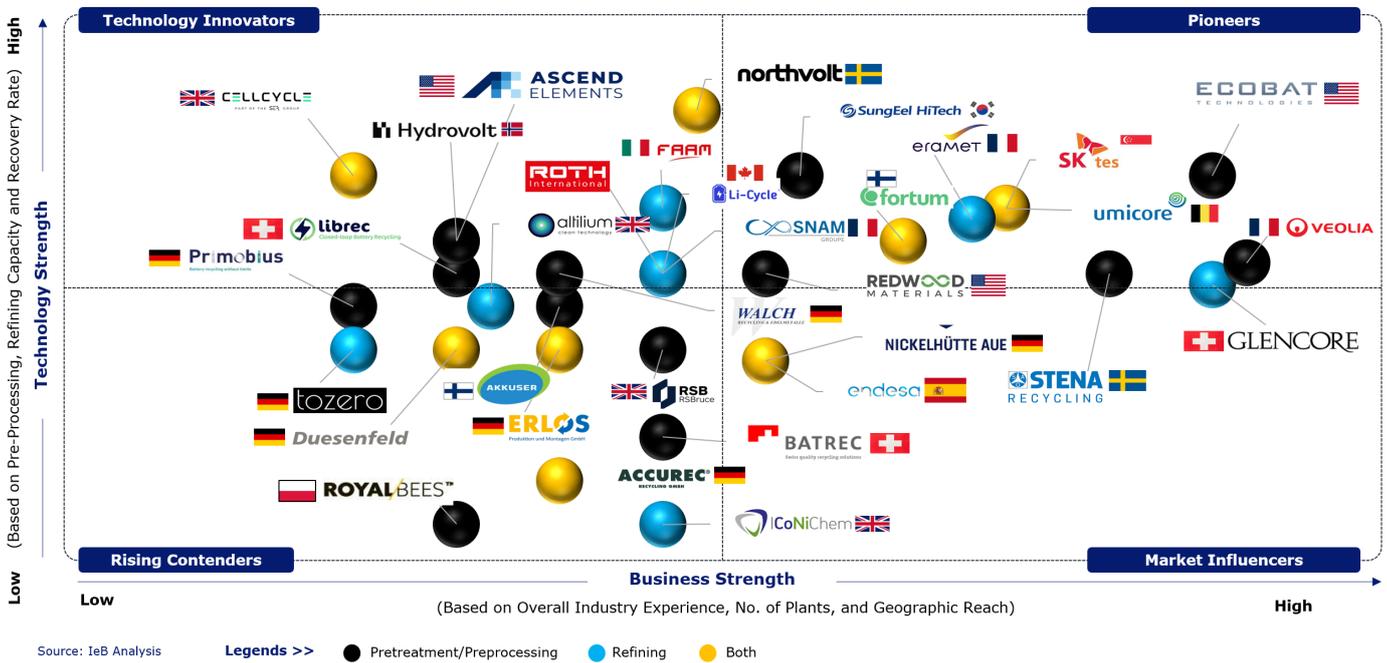
IeB's Insights

- By 2027, automotive end-of-life battery volumes will triple to 31.5 kt as compared to 2024, significantly boosting feedstock availability; With rising battery production and CAM facilities in Finland, Poland, and Hungary, demand for locally processed materials will grow, strengthening Europe's battery supply chain
- Spoke (pretreatment) capacity slightly expands by 2027; European firms dominate recycling, but Asian and American players, like SungEel and Ecobat, hold a strong market share
- To secure supply chain independence, companies like Northvolt, Glencore, BASF, and Tozero are scaling up capacities; However, delays in planned expansions and shifts in production volumes could reshape Europe's recycling ecosystem, influencing the region's push for a closed-loop battery supply chain

Source: IeB Analysis

IeB's Perspective – Competitive Positioning of Recyclers

Analyst Commentary: The majority of European recyclers are functioning on a relatively smaller scale, while most of the pioneers in the European recycling ecosystem are well-established companies from the US and APAC



Impact

This comprehensive assessment translated market complexity into a clear strategic direction by:

- Identifying leading recyclers and PROs shaping the European ecosystem.
- Highlighting the most attractive regions for business opportunities within Europe.
- Recommending 2–3 high-potential partners aligned with the client’s strategic objectives.
- Enabling the client to understand segment-wise market dynamics and develop informed battery recycling strategies.

Conclusion

Through a structured evaluation of the European battery recycling ecosystem, IeB enabled strategic clarity in a rapidly evolving market.

The insights provided a strong foundation for the client to identify growth opportunities, align with regional dynamics, and build a robust strategy within the battery recycling value chain, positioning them to capitalize on the accelerating transition toward a circular battery economy.

Ingenious Brain

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