

# The lithium battery industry is bleak

Will lithium be a surplus in 2025?

(Bloomberg) -- Lithium is enjoying a mini-revival on an uptick in Chinese electric vehicle demand and supply cuts, although analysts caution there's still likely to be a surplus of the battery metal in 2025.

Why are Chinese lithium carbonate spot prices rising?

Chinese lithium carbonate spot prices have rallied around 8% since late October and are now at a three-month high, while futures on the Guangzhou exchange have jumped 13% so far this week. An expansion in Chinese subsidies encouraging people to trade in older cars has aided the nascent rebound in the metal that's crucial to the energy transition.

What's going on with the lithium market in 2022?

On the supply side, a drawn-out slump in the lithium market this year -- prices remain mired at levels that are less than a fifth of the peak in late 2022 - has led to mines closing or cutting costs in Australia, China and elsewhere.

What is the global market for lithium-ion batteries?

The global market for Lithium-ion batteries is expanding rapidly. We take a closer look at new value chain solutions that can help meet the growing demand.

Will demand for lithium increase over the next 15 years?

Even though a recent surplus of the metal has been crashing prices, demand for lithium is set to grow by almost nine times over the next 15 years in a scenario where the world meets the Paris Agreement goals for limiting global warming, according to estimates from the International Energy Agency.

Why are battery prices so low in China?

The excess of manufacturing capacity is driving record-low prices in the Chinese domestic market, where lithium iron phosphate (LFP) battery cells can be bought for close to half the average global price of \$95 per kilowatt hour. There's also a supply glut in battery materials. Why is Northvolt so important for European industrial policy?

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Black mass is the industry term applied to end-of-life (EoL) lithium-ion batteries that have been mechanically processed for potential use as a recycled material to recover the valuable metals present, including cobalt, lithium, manganese, nickel and copper. A significant challenge to the effective processing of black mass is the complexity of the feed material.

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The outlook is especially bleak when it comes to electric vehicle batteries, an important driver of the low-carbon economy. Sweden's Northvolt AB was Europe's best hope of rivaling the giant Chinese companies that make ...

Growth of China's lithium-ion battery industry Despite the current headwinds, China's lithium-ion battery industry has experienced multiple years of double-digit growth. In 2021, the total output of li-ion batteries reached a new high of 324GWh, an increase 106 percent from the previous year, according to data from the MIIT. 2022 is set to ...

A looming over-supply in the lithium market is undisputed. The price boom in 2022 and 2023 attracted significant investments in the lithium industry and created strong growth in the supply of lithium chemicals. However, the growth rate in lithium is showing signs of slowing down which will undoubtedly result in an over-supply starting in 2024 and continuing for the ...

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Both lithium carbonate ( $\text{Li}_2\text{CO}_3$ ) and lithium hydroxide ( $\text{LiOH}$ ) are used for the production of EV batteries, but traditionally, lithium hydroxide is obtained from the processing of lithium carbonate, so the industry is more ...

Drivers for Lithium-Ion battery and materials demand: Electric vehicles as main driver for LiB demand 32.7%. 7 The dependency of the industry on LiB cells and critical battery materials creates significant supply chain risks along the full value chain Overview LiB Cell Supply Chain (CAM/AAM only, example NCM chemistry) Mining Refining oProduction and processing of ...

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5 ???&#0183; Evaporation pools for lithium extraction are seen as part of the Lithium Carbonate Industrial Plant, in the Salar de Uyuni, in Potosi, Bolivia December 15, 2023.

3 ???&#0183; Buyers and sellers of lithium are locked in annual supply talks for 2025 as producers push for

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better terms after another challenging year for the key battery material.

The most prevalent method in the US to extract black mass from lithium batteries is the hydrometallurgical method, ... Visit our dedicated battery raw materials page to discover more insights on the factors at play in the industry in 2023 and beyond. Find out more about our lithium prices. Black mass newsletter Get all the latest black mass prices and commentary ...

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Jacques David talks about the management of the so-called Black Mass produced from the treatment of lithium batteries ahead of the workshop at ICBR 2021 in Geneva on 24th September. 10.09.2021. What is Black Mass actually? Jacques David. Jacques David: Black Mass is what you obtain once a battery has been processed for recycling. Batteries are ...

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