

IMPULSE

The Moment of Truth



The Moment of Truth

24/07/2025 Opportunities of the battery aftermarket

The global shift towards electric mobility is undeniable. Forecasts indicate that the automotive and commercial vehicle industry will produce around 70 million passenger & commercial electric vehicles (EVs) by 2035. The transformation involves not only the development of advanced battery technologies and the localization of value chains, but also the industrialization of gigafactories. The rapid expansion uncovers another significant challenge: the management of enormous volumes of spent batteries and production scrap. Therefore, the implementation of a circular economy for batteries will be a crucial component of a successful battery strategy.

By 2035, the cumulative return volume of spent batteries is expected to reach around 50 million tons globally, a significant increase from the current volume of around two million tons. Loaded into around 2 million shipping containers and placed end-to-end, the number of spent batteries would stretch half around the globe. This staggering volume raises a critical question: what should be done with all these returned batteries and scrap?

Read the impulse in full length: [The Moment of Truth](#)

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