

Advanced Recycling Technologies Market - A Global and Regional Analysis: Focus on End User, Technology, Product Type, and Region - Analysis and Forecast, 2022-2031

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Abstracts

Global Advanced Recycling Technologies Market: Industry Overview

The global advanced recycling technologies market is projected to reach \$9,339.7 million by 2031 from \$270.5 million in 2022, growing at a CAGR of 48.22% during the forecast period 2022-2031.

The demand for advanced recycling technologies is anticipated to grow owing to the implementation of stringent environmental regulations like the restriction of hazardous substances (RoHS) and policies by organizations such as Environmental Protection Agency (EPA) and registration, evaluation, authorization, and restriction of chemicals (REACH). Furthermore, mechanical recycling limitations such as weakening fiber, difficulty in recycling mixed plastic waste, and prohibition from being utilized in the food packaging sector are driving the need for advanced recycling technologies.

Market Lifecycle Stage

Advanced recycling, also known as chemical recycling, refers to a group of technologies that transform post-consumer plastic into its original building blocks, feedstock for new plastics, specialty chemicals, waxes, chemical products, and other non-fuel items. In recent years, advanced recycling technologies have gained popularity as a complementary solution to conventional or mechanical recycling. Two types of mostly recycled plastics, such as polyethylene terephthalate (PET) and high-density polyethylene, are processed mechanically. The other five categories of plastic, such as

colored plastic bottles, fast food containers, and plastic eyeglass frames, cannot be processed by such technologies. Advanced recycling offers a solution for practically all these five types of plastics, while recycled plastic from advanced recycling can also be utilized for food packaging. Therefore, owing to the aforementioned factors, advanced recycling technologies are gaining traction in the market.

However, the key factor limiting the growth of the advanced recycling technologies market is a lack of collection and treatment infrastructure.

Impact

Incentives for better product and plastics design, such as improved extended producer responsibility, product stewardship, tax benefits, and deposit-refund systems, are expected to open significant sales and financing opportunities. This shift was prominently experienced in regions such as Europe and North America.

Impact of COVID-19

The COVID-19 pandemic had a significant impact on the global market for advanced recycling technologies. It impacted the market in both positive and negative ways. Collecting and sorting scrap or debris has become increasingly difficult during the COVID-19 pandemic. Also, the industry endured a huge halt in its production. As a result of the production deficit, the final products became exorbitantly expensive.

Governments have also made an effort to address and resolve COVID-19 issues as they tend to recover from economic and social disasters. To address the pandemic's short- and medium-term socioeconomic effects, they incorporated environment-friendly recovery techniques into their policy packages. Also, the pandemic has put more pressure on the advanced recycling sector to step up production and provide a higher proportion of 'usable' recycled materials for the supply chain.

Market Segmentation:

Segmentation 1: by End User

Food and Beverage Packaging

Non-Food Packaging

Consumer Electronics

Infrastructure and Construction

Automotive

Others

Among different end-users, food and beverage packaging is expected to be the largest application during the forecast period (2022-2031).

Segmentation 2: by Technology

Pyrolysis/ Cracking

Gasification

Depolymerization

Microwave

Others

In 2021, pyrolysis/ cracking technology held the largest share in the global advanced recycling technologies market and is expected to dominate the market during the forecast period (2022-2031).

Segmentation 3: by Product Type

Naphtha

Heavy Gas Oil

Wax Residue

Others

In 2021, naphtha held the largest share in the global advanced recycling technologies market and is expected to dominate the market during the forecast period (2022-2031).

Segmentation 4: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Italy, Spain, and Rest-of-Europe

China

U.K.

Asia-Pacific and Japan - Japan, India, South Korea, Australia, and Rest-of-Asia-Pacific and Japan

Rest-of-the-World - South America, and Middle East and Africa

In the global advanced recycling technologies market, Europe dominates the market due to the presence of several leading companies, such as Plastic Energy, Brightmark, Quantafuel ASA, and many more, along with strict government regulations.

Recent Developments in the Global Advanced Recycling Technologies Market

In August 2022, Cyclyx International, a subsidiary of Agilyx, announced the opening of a new plastics testing laboratory in Portsmouth, the U.S. This strategy enabled the company to enhance its recycle process testing capacity and expand the types of waste plastic waste range to be recycled with the use of company's recycling technology.

In November 2022, Honeywell and Egypt's Environ Adapt for Recycling Industries signed a memorandum of understanding (MoU) to advance plastic recycling in the country. The joint efforts of the two organizations would examine the creation of Egypt's first chemical recycling facility, which would feature cutting-edge Honeywell technology and be able to recycle waste plastic into useful recycled polymer feedstock (RPF).

In July 2022, Carbios collaborated with Salomon, On, PUMA, and Patagonia to develop solutions that improve the recyclability and circularity of their products. Carbios and the four businesses are also expected to conduct research into the recycling of products,

create take-back strategies for used polyester items, including sorting and deconstruction technologies, and compile information on fiber-to-fiber recycling and circularity models.

Demand - Drivers and Limitations

The following are the demand drivers for the global advanced recycling technologies market:

Rising Consumer Awareness about the Need for Recycling Plastic

Implementation of Landfill Fueling Restrictions

Increasing Demand for New Plastic Products

The market is expected to face some limitations as well due to the following challenges:

Challenges in Collecting and Sorting Recyclable Materials

High Price of Advanced Recycled Plastics

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different product types and technology involved in the production of advanced recycling technologies. Moreover, the study provides the reader with a detailed understanding of the global advanced recycling technologies market based on the end user (food and beverage, packaging, non-food packaging, consumer electronics, infrastructure, and construction, automotive, and others).

Growth/Marketing Strategy: The global advanced recycling technologies market has seen major development by key players operating in the market, such as business expansions, partnerships, collaborations, mergers and acquisitions, and joint ventures. The favored strategy for the companies has been product developments, business expansions, and acquisitions to strengthen their position in the global advanced recycling technologies market.

Competitive Strategy: Key players in the global advanced recycling technologies market analyzed and profiled in the study involve advanced recycling technologies manufacturers and the overall ecosystem. Moreover, a detailed competitive benchmarking of the players operating in the global advanced recycling technologies market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts, analyzing company coverage, product portfolio, and market penetration.

The global advanced recycling technologies market has been segmented by different end users, among which food and beverage packaging captured around 46% of the market as of 2021. Other end users, including non-food packaging, accounted for around 27%, consumer electronics accounted for 9%, infrastructure and construction accounted for 7%, automotive accounted for 1%, and other end-use industries accounted for 10% of the total share in 2021 in terms of value.

Key Companies Profiled

Agilyx

Stena Metall

Chevron Phillips Chemical Company LLC

Honeywell International Inc.

Plastic Energy

Enerkem

Loop Industries, Inc.

Gr3n Recycling

Carbios SA

Pyrowave

Polystyvert Inc.

Recycling Avenue BV

BlueAlp Innovations BV

Quantafuel ASA

Mura Technology Limited

Alterra

Aduro Clean Technologies Inc.

Brightmark

GreenMantra Technologies

Axens

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