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Automotive Circular Economy Market - A Global and Regional Analysis: Focus on Application Type, Product Type, and Region - Analysis and Forecast, 2024-2034

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Abstracts

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This report will be delivered in 7-10 working days.Automotive Circular Economy Market Overview

The global automotive circular economy market was valued at $153.63 billion in 2024 and is projected to grow at a CAGR of 11.48%, reaching $455.33 billion by 2034. The increasing adoption of circular economy practices in the automotive industry, such as recycling, remanufacturing, and reusing parts and materials, is driving this market growth. As the automotive sector transitions toward more sustainable and resource-efficient solutions, the demand for refurbished, remanufactured, and recyclable vehicle components is expected to rise. Additionally, the growing focus on reducing carbon footprints, extending vehicle lifecycles, and improving the efficiency of manufacturing processes are contributing factors. With advancements in green technologies, electric vehicles, and sustainable manufacturing, the automotive circular economy market is set for significant expansion in the coming decade.

Introduction to the Automotive Circular Economy Market

The automotive circular economy market focuses on the adoption of sustainable practices aimed at reducing waste, maximizing resource efficiency, and extending the lifecycle of automotive products. This market is driven by the increasing need for environmentally responsible solutions within the automotive industry, including

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recycling, remanufacturing, and reusing vehicle components. Circular economy practices such as refurbishing engines, transmissions, and electronic systems lower production costs and reduce the consumption of raw materials, contributing to the reduction of the industry’s carbon footprint. As the demand for greener alternatives grows, automakers are embracing circularity to enhance sustainability, lower operational costs, and comply with increasingly stringent environmental regulations.

Market Introduction

The automotive circular economy market is experiencing significant growth as the industry shifts toward more sustainable practices aimed at reducing waste and optimizing the use of resources. This market is driven by the increasing adoption of circularity principles such as recycling, remanufacturing, and reusing vehicle components to extend their lifecycle and reduce environmental impact. Automakers are increasingly focusing on refurbishing key components such as engines, transmissions, and batteries to meet sustainability targets, lower production costs, and minimize the consumption of raw materials. As global demand for environmentally responsible solutions in the automotive industry rises, the circular economy market is set to play a crucial role in enhancing the industry's sustainability.

Industrial Impact

The industrial impact of the automotive circular economy market is transformative across multiple sectors, including manufacturing, automotive parts, and waste management. By embracing circular practices, the market is driving significant changes in production processes, reducing waste, and promoting sustainability within the automotive industry. The use of remanufactured parts, such as engines, transmissions, and batteries, helps conserve valuable resources and lowers manufacturing costs, making automotive products more affordable for consumers. This shift toward a circular economy promotes innovation in manufacturing technologies, supply chain management, and logistics while encouraging the growth of green businesses and sustainable material markets.

The companies involved in the automotive circular economy market include major industry players such as Umicore, Sims Metal (Sims Limited), ZF Friedrichshafen AG, BorgWarner, LKQ Corporation, Valeo, Copart Inc., IAA Holdings, LLC., RB Global, Renault Group, BMW Group, TOYOTA MOTOR CORPORATION, Redwood Materials Inc., Aptiv, Bosch GmbH, and Marelli Holdings Co., Ltd. These companies are enhancing their capabilities through strategic partnerships, collaborations, and

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technology advancements to improve the resilience and performance of automotive circular economy in demanding environments. Their continued investments in research and development are driving the growth of the market while supporting the broader trends in the automotive industry.

Market Segmentation:

Segmentation 1: by Vehicle Type

- Passenger Vehicles
- Commercial Vehicles
- Light Commercial Vehicles
- Trucks
- Buses

Passenger Vehicles to Lead the Market (by Vehicle Type)

Passenger vehicles are expected to dominate the automotive circular economy market, driven by the growing demand for sustainable mobility solutions and regulatory pressures for reduced emissions. As automakers face increasing consumer and regulatory demands for greener vehicles, the adoption of circular practices such as vehicle recycling, parts remanufacturing, and the use of recycled materials is gaining momentum.

Due to their high production volumes and longer lifecycles, passenger vehicles present significant opportunities for resource recovery and waste reduction. Innovations in battery recycling for electric vehicles (EVs) and sustainable material usage further propel this trend. As governments worldwide tighten environmental standards, the passenger vehicle segment is set to lead the way in the transition to a circular automotive economy, ensuring a sustainable, resource-efficient future for the industry.

Segmentation 2: by Propulsion Type

- Internal Combustion Engine Vehicles

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Electric Vehicles

Hybrid Electric Vehicles

Plug-In Hybrid Electric Vehicles

Battery Electric Vehicles

Internal Combustion Engine Vehicles to Lead the Market (by Propulsion Type)

Internal combustion engine (ICE) vehicles are expected to dominate the automotive circular economy market, driven by the large existing fleet and ongoing efforts to improve sustainability in their lifecycle. While the transition to electric vehicles (EVs) is gaining momentum, ICE vehicles continue to make up most of the global vehicle production and sales.

Circular practices such as remanufacturing engine components, recycling automotive parts, and reducing emissions during the production process are increasingly being implemented to extend the life cycle of these vehicles. The extensive availability of parts, well-established infrastructure for recycling, and the push for eco-friendly solutions ensure that ICE vehicles remain central to the circular economy, paving the way for more sustainable automotive operations even as the industry shifts toward greater electrification.

Segmentation 3: by End-User Type

Original Equipment Manufacturers (OEMs)

Automotive Aftermarket

Others

Original Equipment Manufacturers (OEMs) to Lead the Market (by End-User Type)

Original equipment manufacturers (OEMs) are expected to dominate the automotive circular economy market, driven by the increasing need for sustainable vehicle

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production and component sourcing. As the automotive industry focuses on reducing its environmental footprint, OEMs are incorporating circular economy practices such as remanufacturing, recycling, and refurbishing in their production processes.

Furthermore, the increasing pressure for manufacturers to meet stricter regulatory standards regarding environmental impact is pushing OEMs to adopt circular practices in designing and producing new vehicles and components. The growing consumer demand for eco-friendly and energy-efficient vehicles also aligns with the OEMs' efforts to embrace circular economy strategies, ensuring their continued dominance in the market and reinforcing their commitment to sustainability within the automotive industry. As the automotive sector moves toward greener, more sustainable practices, OEMs are expected to remain a driving force in the circular economy's growth.

Segmentation 4: by Process Type

- Recycled Products
- Remanufactured Products
- Refurbished Products
- Reused Products

Recycled Products to Lead the Market (by Process Type)

Recycled products are expected to dominate the automotive circular economy market, driven by the increasing emphasis on reducing waste, conserving resources, and lowering environmental impacts. As the automotive industry shifts toward sustainability, recycling materials such as metals, plastics, and batteries have become a key process in minimizing resource consumption and reducing the carbon footprint.

Companies are increasingly focusing on developing efficient recycling technologies to recover valuable materials from end-of-life vehicles, which can be reused in the production of new components. This process helps reduce the need for virgin raw materials and cuts manufacturing costs, making it a cost-effective and environment-friendly alternative.

Segmentation 5: by Component Type

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Battery

Tire

Polymers

Body Parts

Brakes and Suspensions

Others

Others to Lead the Market (by Component Type)

The others category is expected to dominate the automotive circular economy market, driven by the increasing focus on circularity across various non-body automotive components. This includes critical systems such as interior parts, glass, plastics, tires, and electronics, which represent significant opportunities for recycling, remanufacturing, and reuse. These components play a crucial role in reducing waste and contributing to the sustainable lifecycle of vehicles.

As the automotive industry moves toward more sustainable practices, there is an increasing emphasis on reusing and recycling these components to minimize raw material extraction, cut down on production costs, and reduce environmental impact. Innovations in recycling technologies and remanufacturing processes are expected to expand the scope of these efforts, ensuring that a wider range of automotive parts can be reclaimed and repurposed.

Segmentation 6: by Region

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

Europe: U.K., Germany, Italy, France, Spain, Netherlands, Rest-of-Europe

Asia-Pacific: China, Japan, South Korea, India, Australia, Rest-of-Asia-Pacific

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

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North America is expected to lead the automotive circular economy market, driven by its strong regulatory frameworks, technological innovations, and investments in sustainable manufacturing. The U.S. and Canada are pioneering efforts in vehicle recycling, remanufacturing, and the use of recycled materials, with key industry players pushing the adoption of circular practices in automotive production.

Strong public-private partnerships, advancements in battery recycling technologies, and increasing demand for electric vehicles (EVs) are driving the region's dominance. North America's focus on reducing carbon footprints, extending vehicle lifecycles, and improving resource efficiency positions it as a leader in the automotive circular economy, paving the way for a sustainable, resource-efficient future in the automotive industry.

Recent Developments in the Automotive Circular Economy Market

In February 2024, Sims Metal invested over $300,000 in an electric car flattener at its Providence site, which is expected to reduce CO2 emissions by 9.6 tons per year. This highlights the company's commitment to meeting local climate goals while advancing its sustainable practices.

In February 2024, Copart, Inc. Middle East formed a strategic partnership with Madayn in Oman to address the issue of abandoned vehicles in industrial zones. This collaboration supports environmental sustainability by identifying and recovering abandoned vehicles for auction, ensuring proper disposal and reuse.

In January 2024, Valeo launched the windshield-mounted remanufactured video camera in partnership with Stellantis. This product saves up to 99% of natural resources compared to new cameras and offers the same warranty and performance. Valeo's integration of the SUSTAINera label for circular economy parts highlights its leadership in sustainable automotive solutions, offering up to 80% savings in raw materials and 50% less CO2 emissions.

In August 2023, LKQ Corporation completed the acquisition of Uni-Select, a leading distributor of automotive refinish and industrial coatings and related products. This acquisition expands LKQ Corporation's presence in the automotive aftermarket industry. By increasing its network, this acquisition strengthens LKQ Corporation's position in the automotive circular economy, especially in North America and the U.K.

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In 2022, ZF Friedrichshafen AG remanufactured over 5,500 products globally, avoiding CO2 emissions equivalent to 32,000 tons, showcasing its commitment to a sustainable future. With over 20 remanufacturing locations worldwide, ZF Friedrichshafen AG plays a pivotal role in industrial reprocessing.

Demand - Drivers, Limitations, and Opportunities

Market Drivers: Stringent Government Regulations and Policies

Stringent government regulations and policies significantly impact the automotive circular economy market by persuading industry players to adopt sustainable practices and reduce environmental footprints. Regulatory frameworks across regions, including the European Union's End-of-Life Vehicles Directive, China's EV battery recycling mandates, and India's Vehicle Scrappage Policy, are creating an environment of heightened accountability. Such policies necessitate adherence to specific recycling targets, waste reduction, and sustainable resource management, consequently reshaping traditional automotive manufacturing and end-of-life vehicle disposal practices. As compliance becomes mandatory, automakers are increasingly investing in circular economy processes, leading to widespread industry transformation.

Automotive manufacturers have proactively responded to these regulatory pressures, integrating circular economy principles into their operational frameworks. For instance, Renault Group established its Re-Factory, aligning with European directives by reusing vehicle components and second-life battery systems. In response to EU regulations, BMW Group has substantially increased the share of recycled materials in its vehicles, reflecting strategic alignment with policy requirements. Furthermore, Nissan, complying with Japan's Automobile Recycling Law and global sustainability policies, developed a joint battery recycling venture, 4R Energy, to manage end-of-life EV batteries responsibly.

Market Challenges: Complex Supply Chains and Infrastructure Challenges

Complex supply chains and infrastructure challenges pose significant restraints to the effective adoption of circular economy practices within the automotive industry. The global automotive sector is characterized by intricate supply networks spanning multiple regions, diverse stakeholders, and extensive logistical operations. Such complexity often complicates automotive components' traceability, recovery, and recycling,

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particularly those containing hazardous materials or advanced technologies such as batteries. Additionally, inadequate recycling and remanufacturing infrastructure, especially in emerging markets, further limits the industry's capacity to efficiently manage end-of-life vehicles and components, hampering the full potential of circular economy initiatives.

To address these challenges, automotive manufacturers and stakeholders are increasingly engaging in strategic collaborations and investments aimed at enhancing circular economy infrastructures. Initiatives include the establishment of regional recycling hubs, joint ventures with specialized recycling companies, and investment in advanced technologies for component traceability, sorting, and remanufacturing.

Market Opportunities: Growing EV adoption Creating Substantial Opportunities in Repurposing Batteries

The increasing adoption of electric vehicles (EVs) presents a substantial opportunity for the automotive circular economy, specifically in the area of battery repurposing. Electric vehicle batteries typically retain considerable residual capacity, approximately 70-80%, after their automotive lifespan, making them suitable for secondary, less-demanding applications, such as stationary energy storage. Leveraging second-life battery solutions addresses environmental concerns related to battery waste, conserves valuable raw materials, and provides cost-effective energy storage options. This repurposing strategy thus supports sustainability objectives, creates new revenue streams for automakers, and significantly enhances battery lifecycle management's overall economics and efficiency.

Furthermore, the future potential for battery repurposing is considerable, driven by projected exponential growth in EV adoption globally. By 2030, the volume of batteries reaching the end of their automotive use is expected to increase substantially, creating extensive market opportunities in energy storage for residential, industrial, and grid-scale applications. Advances in battery management technologies and supportive regulations promoting battery reuse will further accelerate this market segment's growth. Companies proactively investing in battery repurposing infrastructure and technologies stand to benefit from early-mover advantages, securing a competitive position within the evolving electric mobility and sustainable energy ecosystems.

How can this report add value to an organization?

Product/Innovation Strategy: The automotive circular economy market is segmented

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based on various applications, vehicle types, propulsion types, and product categories, providing valuable insights into the industry's shift toward sustainability. The application segmentation includes a focus on vehicle components such as body parts, tires, batteries, and other key elements that are recycled, remanufactured, refurbished, and reused. By vehicle type, the market is divided into passenger vehicles and commercial vehicles, with the latter further segmented into light commercial vehicles, trucks, and buses. Propulsion types include internal combustion engine vehicles and electric vehicles, which are sub-categorized into hybrid electric vehicles, plug-in hybrid electric vehicles, and battery electric vehicles. The market is also analyzed by end-user type, including original equipment manufacturers (OEMs), the automotive aftermarket, and others.

Additionally, the market focuses on product types such as recycled, remanufactured, refurbished, and reused products. Key components in this circular economy include batteries, tires, polymers, body parts, and brakes and suspensions. As the automotive industry seeks to reduce waste and improve resource efficiency, these circular economy practices are becoming integral to achieving sustainability goals and driving growth in the market.

Growth/Marketing Strategy: The automotive circular economy market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include product development.

Competitive Strategy: The key players in the automotive circular economy market analyzed and profiled in the study include professionals with expertise in the automobile and automotive domains. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

Research Methodology

Factors for Data Prediction and Modelling

> The base currency considered for the market analysis is US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.

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The currency conversion rate was taken from the historical exchange rate on the Oanda website.

Nearly all the recent developments from January 2022 to March 2025 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the automotive circular economy market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the automotive circular economy market and various stakeholders in the ecosystem. Respondents such as CEOs, vice

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presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of reports segmentation and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for market type

percentage split of individual markets for geographical analysis

Secondary Research

This research study of the automotive circular economy market involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as IRENA and IEA.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

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qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled in the automotive circular economy market have been selected based on inputs gathered from primary experts who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

Umicore

Sims Metal (Sims Limited)

ZF Friedrichshafen AG

BorgWarner

LKQ Corporation

Valeo

Copart Inc.

IAA Holdings, LLC.

RB Global

Renault Group

BMW Group

TOYOTA MOTOR CORPORATION.

Redwood Materials Inc.

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Aptiv.

Bosch GmbH

Companies not part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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