

Global MHETase Market Size Study and Forecast by Application (Beverage Packaging Recycling, Food Packaging Recycling, PET Textile & Fiber Recycling, PET Film & Sheet Recycling, Industrial PET Scrap Recycling), by End-User (Waste Management, Plastic Recycling Facilities, Packaging, Textile, Polyester, Biotechnology and Research Institutes, Others), and Regional Forecasts 2026–2036

<https://marketpublishers.com/r/GB5826C83BA8EN.html>

Date: July 2026

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: GB5826C83BA8EN

Abstracts

The Global MHETase Market, valued at USD 4.53 million in 2025, is anticipated to reach USD 105.70 million by 2036, expanding at a 31.5% CAGR during the forecast period. MHETase (Mono(2-hydroxyethyl) terephthalate hydrolase) is a special enzyme that catalyzes the hydrolysis of mono (2-hydroxyethyl) terephthalic acid (MHET), an intermediate generated during the degradation of polyethylene terephthalate (PET). MHETase, in combination with PETase and other enzymatic recycling technologies, allows PET waste to be efficiently broken down into its original building blocks, thereby facilitating high-quality plastic recycling and circular economy strategies. The market is growing rapidly due to rising global plastic waste, increasing investments in enzymatic recycling technologies, stringent environmental regulations, and growing demand for sustainable PET recycling solutions. Investment in advanced recycling technologies, capable of recovering high-quality recyclable materials, is being fuelled by increasing plastic pollution and global circular economy strategies, according to the United Nations Environment Programme (UNEP, 2024). Further progress in enzyme engineering, synthetic biology and industrial biotechnology support further commercialization of MHETASE-based recycling processes.

Global MHETase Market: Key Highlights

The Global MHETase Market was valued at USD 4.53 million in 2025 and is projected to reach USD 105.70 million by 2036, at a CAGR of 31.5% during the forecast period.

Europe is the leading market, driven by strong circular economy policies, advanced research on enzymatic recycling and large investments in sustainable plastic recycling technologies.

North America is expected to be the fastest-growing market due to the growing biotechnology innovation, increasing plastic recycling investments and commercialization of enzyme-based recycling systems.

The beverage packaging recycling holds the largest application segment due to the fact that PET beverage bottles are the largest source of recyclable PET waste across the world.

Plastic Recycling Facilities is the largest end-user segment owing to the rising adoption of enzymatic PET recycling technologies.

Growing regulatory pressure for better plastic waste management is driving the uptake of enzyme-assisted recycling technologies.

Synthetic biology and protein engineering are continuously improving the efficiency, thermal stability, and commercial scalability of MHETase.

Growing markets are being driven by greater collaboration between biotechnology companies, recyclers and makers of consumer goods.

Research Scope & Methodology

The Global MHETase Market report looks at developments in enzyme technology, PET recycling trends, commercialization activities, competitive dynamics, regulatory frameworks and regional market performance from 2025 to 2036. The study covers the application of MHETase in enzymatic PET recycling and industrial biotechnology.

The research methodology includes primary interviews with biotechnology companies, enzyme producers, plastic recyclers, research institutions, packaging manufacturers, waste management organizations and industry experts. Secondary research includes authenticated publications, released after 2022, by government institutions, environmental agencies, biotechnology organizations, plastics industry associations and

international sustainability bodies. Market estimation is based on PET recycling capacity, investments in biotech, commercialisation of enzymatic recycling, plastic waste generation and industrial adoption rates. Forecast models include macroeconomic indicators, environmental regulations, circular economy policies, advances in enzyme engineering and recycling infrastructure investments. Robust forecasting accuracy is ensured by data triangulation from enzyme developers, recycling companies, research organizations and industry specialists.

Key Market Segments

By Application:

Beverage Packaging Recycling

Food Packaging Recycling

PET Textile & Fiber Recycling

PET Film & Sheet Recycling

Industrial PET Scrap Recycling

By End-User:

Waste Management

Plastic Recycling Facilities

Packaging

Textile

Polyester

Biotechnology and Research Institutes

Others

Key Market Players

Carbios

Creative Enzymes

GenScript Biotech Corporation

Novonesis

Codexis, Inc.

BRAIN Biotech AG

Amano Enzyme Inc.

BBI Solutions

Enzymicals AG

Advanced Enzyme Technologies Ltd.

Industry Trends

The increasing global concern for plastic pollution is accelerating investments in enzymatic PET recycling technologies that can produce virgin quality recycled materials.

Biotechnology companies are increasingly using protein engineering and synthetic biology to improve the activity of MHETase enzyme, as well as its thermal stability and performance at industrial scale.

Beverage makers are investing in advanced PET recycling technologies to meet recycled content goals and support circular packaging commitments.

The regulatory initiatives for extended producer responsibility (EPR) and circular economy practices are promoting the adoption of novel plastic recycling technologies.

Biotech firms, packaging producers and recycling companies are making

strategic partnerships to accelerate the commercialization of enzymatic PET depolymerization.

Research institutions are combining PETase, MHETase and other enzymes into next-generation enzyme cocktails aiming for the highest possible efficiency in the conversion of PET.

Industrial recycling facilities are investigating enzyme-assisted recycling processes for mixed and difficult-to-recycle PET waste streams.

Growing investments in sustainable textile recycling are creating new possibilities for enzymatic recovery of polyester fibers used in apparel and industrial fabrics.

Artificial intelligence and computational protein engineering are increasingly employed to rapidly optimize the structures of enzymes to improve recycling performance.

Favorable long-term conditions for the commercialization of MHETase are being created by growing government support for sustainable waste management and advanced recycling infrastructure.

Market Determinants

Rising Global Focus on Plastic Waste Reduction and Circular Economy: The increasing volume of plastic waste and growing emphasis on circular economy strategies are major drivers of the MHETase market. Governments, industries, and environmental organizations are promoting advanced recycling technologies capable of converting PET waste into high-quality raw materials for reuse. According to the United Nations Environment Programme (UNEP, 2024), global initiatives aimed at reducing plastic pollution continue accelerating investments in innovative recycling technologies and sustainable waste management solutions.

Increasing Adoption of Enzymatic PET Recycling Technologies: Conventional mechanical recycling often results in material degradation after multiple recycling cycles. MHETase, when used alongside PETase and complementary enzymes, enables efficient depolymerization of PET into its original monomers,

facilitating high-quality closed-loop recycling. Growing commercialization of enzymatic recycling technologies is significantly boosting market demand.

Advancements in Synthetic Biology and Protein Engineering: Continuous innovation in enzyme engineering, computational biology, directed evolution, and synthetic biology is improving MHETase activity, substrate specificity, thermal stability, and industrial scalability. These technological advancements are increasing commercial viability while reducing processing costs for enzymatic PET recycling operations.

Growing Sustainability Commitments from Packaging and Consumer Goods Companies: Global packaging manufacturers and consumer goods companies are increasing investments in advanced recycling technologies to achieve recycled content targets and reduce carbon emissions. Adoption of MHETase-based recycling processes supports corporate sustainability initiatives by enabling the production of food-grade recycled PET with high material quality.

High Commercialization and Production Costs: Although MHETase demonstrates significant technological potential, commercial-scale enzyme production, process optimization, and industrial deployment remain relatively expensive. High research and development costs, fermentation expenses, and infrastructure investments continue limiting widespread market adoption during the early commercialization phase.

Limited Industrial Recycling Infrastructure: Enzymatic PET recycling remains an emerging technology with limited large-scale industrial infrastructure compared with conventional mechanical recycling. Scaling enzyme-assisted recycling facilities, integrating new processing technologies, and establishing reliable collection systems remain important challenges for broader market expansion.

Opportunity Mapping Based on Market Trends

Expansion of Food-Grade Closed-Loop PET Recycling: Growing regulatory requirements for recycled plastic content in food and beverage packaging are creating significant opportunities for MHETase-enabled recycling technologies capable of producing virgin-quality PET monomers. According to the UNEP (2024), circular packaging initiatives continue encouraging investment in advanced recycling processes that improve material recovery and reduce plastic

waste.

Rising Demand for Textile-to-Textile Recycling: Increasing efforts to recycle polyester textiles into high-quality fibers are creating attractive opportunities for MHETase applications. Enzymatic recycling technologies can improve recovery of polyester materials while supporting sustainability objectives across the global textile and apparel industries.

Commercialization Through Strategic Partnerships: Collaborations among biotechnology companies, packaging manufacturers, consumer brands, and recycling operators are accelerating commercialization of enzyme-based PET recycling. Joint investments in pilot facilities, demonstration plants, and industrial-scale recycling projects are expected to create substantial long-term market opportunities.

Expansion Across Emerging Circular Economy Markets: Rapid industrialization, increasing plastic consumption, strengthening environmental regulations, and rising investments in sustainable waste management across Asia Pacific, Latin America, the Middle East, and Africa are creating favorable conditions for MHETase adoption. Continued government support for circular economy initiatives and advanced recycling infrastructure is expected to generate significant long-term growth opportunities throughout emerging economies.

Value-Creating Segments and Growth Pockets

Beverage packaging recycling dominates the market through abundant PET bottle waste and circular packaging initiatives

Based on Application, the market is divided into Beverage Packaging Recycling, Food Packaging Recycling, PET Textile & Fiber Recycling, PET Film & Sheet Recycling and Industrial PET Scrap Recycling. Out of these, Beverage Packaging Recycling holds the largest share of the global MHETase market with an estimated share of 41.8% in 2025. Leadership is being driven by the huge global volume of PET beverage bottles, increasing recycled content mandates, and growing investment in closed loop bottle-to-bottle recycling systems. Corporate sustainability targets and circular economy commitments are driving beverage companies to adopt enzymatic recycling technologies to produce food-grade recycled PET. PET beverage packaging is still one of the most important areas for advanced recycling technologies, as it is a large contributor to global plastic waste (United Nations Environment Programme (UNEP, 2024).

The PET Textile & Fiber Recycling segment is estimated to grow at the fastest rate of 33.2% CAGR during the forecast period. The adoption of enzyme-based polyester recycling technologies is gaining momentum due to the increasing demand for circular fashion, rising recycling of polyester garments, and growing regulatory focus on textile waste management.

Plastic recycling facilities lead end-user adoption while biotechnology accelerates commercialization

The End-User segment is dominated by Plastic Recycling Facilities with an estimated market share of 37.5% in 2025. In addition to improving PET recovery efficiency and producing high-purity monomers, more facilities are adopting enzymatic recycling technologies to existing recycling operations to expand closed-loop recycling capabilities. Continued investment in advanced recycling infrastructure strengthens the market leadership of this segment even further.

The Biotechnology and Research Institutes segment is projected to grow at the fastest pace over the forecast period. Research on enzyme engineering, protein optimization, synthetic biology and industrial biotechnology is being expanded to accelerate the development of next generation MHETase variants with improved catalytic efficiency and commercial scalability.

Enzyme engineering creates the strongest long-term value opportunity

The best opportunity for long term value creation is in advanced enzyme engineering and industrial biocatalysis. Advances in directed evolution, AI-assisted protein design, synthetic biology and precision fermentation are constantly advancing and enabling the creation of highly efficient MHETase enzymes that can be used for large-scale commercial PET recycling. The companies investing in scalable enzyme manufacturing, strategic partnerships with packaging and recycling companies and integrated enzymatic recycling platforms are expected to gain significant long-term growth opportunities across the global MHETase market.

Regional Market Assessment

Europe dominates the market through strong circular economy policies and advanced enzymatic recycling initiatives

The Europe region is expected to dominate the global MHETase market in 2025 with an estimated 42.6% of the total revenue share. The region enjoys strong environmental standards, aggressive recycled content targets and large investments in circular economy technologies. Countries like France, Germany, Netherlands, Belgium and the UK are actively supporting enzymatic PET recycling through public-private partnerships, biotech innovations and sustainable packaging initiatives. The European Green Deal and Circular Economy Action Plan (European Commission, 2024) continue to support advanced recycling technologies that can help to reduce plastic waste and increase the use of recycled materials. Europe's market leadership is reinforced by the presence of

leading enzyme developers and recycling technology companies.

North America maintains a strong position through biotechnology innovation and recycling investments

The North America region is expected to be a lucrative market owing to the increasing corporate sustainability initiatives, rising biotechnology capabilities, and increasing commercialization of enzyme-based recycling technologies. North America is witnessing rising investments in advanced recycling infrastructure, food-grade recycled PET production and biotechnology research on enzyme engineering in both the United States and Canada. The United States Environmental Protection Agency (EPA, 2024) observes that the increasing emphasis on sustainable materials management and circular economy practices continues to encourage the adoption of innovative plastic recycling technologies across the region.

Asia Pacific records the fastest growth through expanding PET consumption and recycling infrastructure

Asia Pacific is expected to witness the fastest growth during the forecast period and is projected to grow at a CAGR of 34.1% during the forecast period 2026 to 2036. Due to rapid industrialization, increasing PET packaging consumption, rising plastic waste generation and strengthening government regulations, China, Japan, South Korea, India and Southeast Asia are all investing in advanced recycling technologies. The United Nations Environment Programme (UNEP, 2024) notes that expanding circular economy initiatives and increasing investment in sustainable waste management infrastructure across Asia are creating favourable conditions for enzymatic PET recycling technologies. Rising demand for food-grade recycled plastics and sustainable textile recycling also drives the growth of the region.

LAMEA presents emerging opportunities through improving waste management and sustainability initiatives

The LAMEA region is expected to grow at a steady rate in the forecast period, owing to the growing government expenditure on waste management infrastructure, plastic recycling schemes, and circular economy development. In Latin America, public-private partnerships are boosting PET collection and recycling capacity. In the Middle East, countries are increasing their investments in sustainable industrial development and environmental technologies. Certain African nations are enhancing the collection of plastic waste through government-led efforts and international sustainability initiatives. The LAMEA region is anticipated to see long-term adoption of MHETase-enabled recycling technologies, driven by increased investments in resource efficiency, modernization of waste management, and circular economy infrastructure (World Bank, 2024).

11. Recent Developments

June 2025: Carbios advanced the commercialization of its enzymatic PET recycling technology by expanding industrial-scale validation activities aimed at improving PET depolymerization efficiency and supporting food-grade recycled PET production.

April 2025: Novonesis strengthened its enzyme innovation portfolio through continued development of high-performance biocatalysts for sustainable plastic recycling and circular bioeconomy applications.

October 2024: Codexis, Inc. expanded its protein engineering capabilities to optimize industrial enzymes for advanced recycling applications, focusing on improving catalytic efficiency, thermal stability, and large-scale commercial performance.

August 2024: BRAIN Biotech AG accelerated research into enzyme engineering technologies supporting sustainable polymer recycling, utilizing synthetic biology and precision biocatalyst development to enhance PET depolymerization processes.

Critical Business Questions Addressed

What is the current and projected size of the global MHETase market?

The global MHETase market was valued at USD 4.53 million in 2025 and is projected to reach USD 105.70 million by 2036, growing at a CAGR of 31.5% during the forecast period.

Which factors are driving market growth?

The market is driven by increasing global plastic waste, rising adoption of enzymatic PET recycling technologies, expanding circular economy initiatives, advances in synthetic biology and protein engineering, growing regulatory pressure for sustainable waste management, and increasing investments in food-grade recycled PET production.

Which application segment dominates the market?

Beverage Packaging Recycling holds the largest market share due to the high global volume of PET beverage bottles, increasing recycled-content mandates, and growing investment in closed-loop bottle-to-bottle recycling systems that require high-purity PET monomer recovery.

Which end-user segments are expected to generate the greatest value?

Plastic Recycling Facilities remain the largest end-user segment owing to increasing deployment of enzyme-assisted PET recycling technologies, while Biotechnology and

Research Institutes are expected to register the fastest growth due to expanding research in enzyme engineering, synthetic biology, and next-generation biocatalyst development.

Which regions offer the strongest future growth opportunities?

Europe currently leads the global market through strong circular economy policies, advanced biotechnology capabilities, and significant investments in enzymatic recycling. Asia Pacific is projected to record the fastest growth due to expanding PET consumption, strengthening recycling infrastructure, and increasing sustainability initiatives, while North America continues to generate substantial demand through biotechnology innovation and commercialization of advanced recycling technologies. Emerging opportunities are also expanding across the LAMEA region through improving waste management infrastructure, plastic recycling programs, and circular economy investments.

Beyond the Forecast

The MHETase market is expected to evolve toward fully integrated enzymatic PET recycling ecosystems, where MHETase works alongside PETase and other engineered enzymes to enable efficient closed-loop recycling of packaging, textiles, and industrial PET waste at commercial scale.

Advancements in artificial intelligence-assisted protein engineering, directed evolution, precision fermentation, synthetic biology, and industrial biocatalysis will significantly improve enzyme performance, reduce processing costs, and accelerate commercialization of enzymatic recycling technologies worldwide.

As global circular economy policies, recycled-content regulations, extended producer responsibility (EPR) programs, sustainable packaging initiatives, and corporate decarbonization strategies continue driving demand for high-quality recycled PET, companies investing in scalable enzyme production, strategic industry collaborations, and next-generation recycling platforms will be well positioned to achieve sustained long-term growth in the global MHETase market.

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