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# The Global Advanced (Chemical or Feedstock) Recycling Market 2025-2040

https://marketpublishers.com/r/GEEF04639D2FEN.html
Date: March 2025
Pages: 363
Price: US$ 1,300.00 (Single User License)
ID: GEEF04639D2FEN

## Abstracts

Advanced recycling, sometimes referred to as chemical or feedstock recycling, is a process that breaks down waste to the molecular level so it can be converted to new raw materials. The advanced recycling market is experiencing major growth as stakeholders seek solutions for previously unrecyclable plastic waste. Unlike mechanical recycling, which primarily reshapes polymers, advanced recycling breaks materials down to molecular building blocks, enabling true circularity for a wider range of plastics and other materials.

The market is driven by increasing regulatory pressure, corporate sustainability commitments, and technological maturation across multiple conversion platforms. Leading technologies include pyrolysis, gasification, solvolysis, and depolymerization, each targeting specific polymer streams or end-product applications. Investment flows into the sector have accelerated dramatically, with over $7.5 billion committed since 2020. This integration of advanced recycling with conventional petrochemical infrastructure creates deployment advantages through existing distribution networks and technical expertise.

Regulatory frameworks increasingly support advanced recycling adoption. The European Union's Circular Economy Action Plan and Plastic Packaging Levy create direct economic incentives for recycled content, while the U.S. EPA and state-level legislation increasingly recognize chemical recycling as legitimate recycling rather than waste disposal. Challenges persist despite these advances. Capital intensity remains high at $1,500-4,000 per ton of annual capacity, creating economic barriers to rapid scaling. Process yield and energy efficiency improvements continue through catalyst development and process integration, gradually improving economics. Feedstock quality and consistency represent operational challenges, with contaminants potentially

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affecting catalyst performance and product quality.

Market forecasts suggest advanced recycling will process 20-25 million tons of plastic waste annually by 2030, representing approximately 5-7% of global plastic production. While still a modest fraction of total plastics volume, this represents significant growth from current levels (

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## 6 MATERIALS ANALYSIS

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