

Global End-of-Life Photovoltaic Module Recycling Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global End-of-Life Photovoltaic Module Recycling Equipment market size is expected to reach \$ 146 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

End-of-life photovoltaic module recycling equipment refers to specialized solid-waste processing systems designed for decommissioned solar power plants, PV module manufacturing scrap, and renewable material recovery. Its core function is to safely dismantle, separate, refine, and recover aluminum frames, junction boxes, glass, encapsulant films, backsheets, solar cells, copper ribbons, silicon, silver, and other materials from crystalline silicon or thin-film PV modules. Such equipment typically consists of de-framing machines, junction box removal machines, glass separation units, thermal delamination systems, crushing and sorting systems, screening and magnetic separation units, hydrometallurgical recovery modules, dust and exhaust treatment systems, and automated conveying and control systems. It can be delivered as standalone machines, modular equipment, mobile systems, or turnkey production lines. Key process routes include low-breakage mechanical separation, hot-knife separation, pyrolysis delamination, physical crushing and sorting, and wet metal recovery. The equipment addresses major industry challenges such as bulky module handling, tightly bonded composite materials, high logistics cost, glass contamination, low silver and copper recovery efficiency, and secondary pollution control. Typical customers include PV recycling companies, solid-waste treatment firms, module manufacturers, solar farm decommissioning service providers, recycling industrial parks, and local environmental platforms. Revenue is generated mainly from equipment sales, engineering integration, process licensing, spare parts, consumables, and long-term operation and maintenance services.

The industrial value of end-of-life photovoltaic module recycling equipment is shifting from downstream environmental machinery to core infrastructure for the renewable energy circular economy. After years of rapid global PV deployment, early-generation modules are gradually entering the phases of retirement, failure replacement, and plant repowering. Large-scale module treatment will become an important issue for solar asset management and local solid-waste systems. The core problem addressed by this equipment is not simple waste reduction, but the conversion of bulky, composite, high-logistics-cost retired modules containing recyclable materials into feedstocks that can re-enter manufacturing and reuse systems. Glass and aluminum account for most of the module weight and are relatively easier to recover, but rough crushing can contaminate glass with metals, encapsulants, and dust, sharply reducing its value. Silicon, copper, and silver are present in smaller quantities but carry higher value, requiring higher separation precision and downstream refining capability. As a result, the industry is moving from rough crushing equipment toward integrated systems combining automated dismantling, low-breakage separation, thermal delamination, physical sorting, and wet recovery. Equipment value will rise with deeper material recovery and higher automation.

Technology competition is increasingly centered on material integrity, processing efficiency, environmental control, and project adaptability. Japanese solutions emphasize non-crushing glass separation and high-cleanliness recovery, making them suitable for applications with strict glass reuse requirements. Italian suppliers are more focused on turnkey lines, modular factories, and high-automation delivery, which fit centralized recycling centers. South Korea's mobile systems represent an on-site preprocessing direction for large solar farm decommissioning and repowering projects, reducing logistics volume, breakage risk, and carbon emissions. Chinese suppliers, supported by a broad solid-waste equipment manufacturing base, have developed cost-oriented turnkey solutions covering dismantling, pyrolysis, crushing, screening, dust collection, and exhaust treatment. Future buyers will not evaluate equipment only by unit price, but by throughput, energy consumption per unit, glass integrity, metal recovery rate, dust control, exhaust treatment, automation level, footprint, and operating cost. Suppliers that can process intact modules, broken modules, and manufacturing scrap while flexibly combining standalone machines and turnkey lines will be better positioned to win recycling plant and decommissioning project orders.

Policy and market forces together determine the growth trajectory of this equipment category. Europe has already incorporated PV modules into the waste electrical and electronic equipment framework, and producer responsibility plus compliance-based

recycling systems provide an institutional basis for equipment investment. In the United States, regulation is still evolving across federal and state levels, but as end-of-life solar management rules become clearer, demand for professional treatment facilities is expected to emerge gradually. China, India, Australia, Japan, and South Korea also face growing pressure from module retirement, early replacement, and resource recovery. In the short term, the market remains project-based, with demonstration lines, regional treatment centers, and uneven procurement cycles. In the medium to long term, as retirement volumes increase, recycling responsibilities become clearer, recycled-material standards are established, and the economics of recovering silver, copper, and silicon improve, end-of-life photovoltaic module recycling equipment will shift from a niche environmental product to a regular capital expenditure item in the downstream PV value chain. Companies with process patents, turnkey engineering capability, overseas delivery experience, and strong secondary pollution control will be better positioned in global recycling infrastructure buildout.

This report studies the global End-of-Life Photovoltaic Module Recycling Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for End-of-Life Photovoltaic Module Recycling Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of End-of-Life Photovoltaic Module Recycling Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global End-of-Life Photovoltaic Module Recycling Equipment total production and demand, 2021-2032, (Units)

Global End-of-Life Photovoltaic Module Recycling Equipment total production value, 2021-2032, (USD Million)

Global End-of-Life Photovoltaic Module Recycling Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global End-of-Life Photovoltaic Module Recycling Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: End-of-Life Photovoltaic Module Recycling Equipment domestic production, consumption, key domestic manufacturers and share

Global End-of-Life Photovoltaic Module Recycling Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) &

(Units)

Global End-of-Life Photovoltaic Module Recycling Equipment production by Equipment Form, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global End-of-Life Photovoltaic Module Recycling Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global End-of-Life Photovoltaic Module Recycling Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NPC Incorporated, Kankyo Hozen Service, RESET Company, Won Kwang S&T, Ecoprogetti, Compton Industriale, Stokkermill, Schutte Hammermill, Henan Recycle Environmental Protection Equipment, SUNY GROUP, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World End-of-Life Photovoltaic Module Recycling Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Equipment Form, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global End-of-Life Photovoltaic Module Recycling Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global End-of-Life Photovoltaic Module Recycling Equipment Market, Segmentation by Equipment Form:

Standalone Equipment

Modular Equipment

Turnkey Production Line Equipment

Global End-of-Life Photovoltaic Module Recycling Equipment Market, Segmentation by Feedstock Condition:

Intact Module Recycling Equipment

Broken Module Recycling Equipment

Pre-Dismantled Module Recycling Equipment

Global End-of-Life Photovoltaic Module Recycling Equipment Market, Segmentation by Primary Function:

Frame and Junction Box Removal Equipment

Glass Separation Equipment

Crushing and Sorting Equipment

Silicon and Silver Extraction Equipment

Pollution Control Supporting Equipment

Global End-of-Life Photovoltaic Module Recycling Equipment Market, Segmentation by Application:

Centralized Factory Processing

On-Site Project Preprocessing

Solar Farm Decommissioning Processing

Module Manufacturing Scrap Processing

Municipal E-Waste Processing

Companies Profiled:

NPC Incorporated

Kankyo Hozen Service

RESET Company

Won Kwang S&T

Ecoprogetti

Compton Industriale

Stokkermill

Schutte Hammermill

Henan Recycle Environmental Protection Equipment

SUNY GROUP

Gongyi Ruisaike Machinery Equipment

Henan Rexede Energy Environmental Protection Technology

Henan Honest Heavy Machinery

Key Questions Answered:

1. How big is the global End-of-Life Photovoltaic Module Recycling Equipment market?
2. What is the demand of the global End-of-Life Photovoltaic Module Recycling Equipment market?
3. What is the year over year growth of the global End-of-Life Photovoltaic Module Recycling Equipment market?
4. What is the production and production value of the global End-of-Life Photovoltaic Module Recycling Equipment market?
5. Who are the key producers in the global End-of-Life Photovoltaic Module Recycling Equipment market?
6. What are the growth factors driving the market demand?

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