

Global End-of-Life Photovoltaic Module Recycling Equipment Market Growth 2026-2032

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Abstracts

The global End-of-Life Photovoltaic Module Recycling Equipment market size is predicted to grow from US\$ 76.72 million in 2025 to US\$ 143 million in 2032; it is expected to grow at a CAGR of 7.7% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "End-of-Life Photovoltaic Module Recycling Equipment Industry Forecast" looks at past sales and reviews total world End-of-Life Photovoltaic Module Recycling Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected End-of-Life Photovoltaic Module Recycling Equipment sales for 2026 through 2032. With End-of-Life Photovoltaic Module Recycling Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world End-of-Life Photovoltaic Module Recycling Equipment industry.

This Insight Report provides a comprehensive analysis of the global End-of-Life Photovoltaic Module Recycling Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on End-of-Life Photovoltaic Module Recycling Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global End-of-Life Photovoltaic Module Recycling Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for End-of-Life Photovoltaic Module Recycling Equipment and breaks down the forecast by Equipment Form, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global End-of-Life Photovoltaic Module Recycling Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of End-of-Life Photovoltaic Module Recycling Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Equipment Form:

Standalone Equipment

Modular Equipment

Turnkey Production Line Equipment

Segmentation by Feedstock Condition:

Intact Module Recycling Equipment

Broken Module Recycling Equipment

Pre-Dismantled Module Recycling Equipment

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

Segmentation by Application:

Centralized Factory Processing

On-Site Project Preprocessing

Solar Farm Decommissioning Processing

Module Manufacturing Scrap Processing

Municipal E-Waste Processing

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global End-of-Life Photovoltaic Module Recycling Equipment market?

What factors are driving End-of-Life Photovoltaic Module Recycling Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do End-of-Life Photovoltaic Module Recycling Equipment market opportunities vary by end market size?

How does End-of-Life Photovoltaic Module Recycling Equipment break out by Equipment Form, by Application?

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