

# Scrap Metal Recycling Market Outlook 2026-2034: Market Share, and Growth Analysis By Metal (Ferrous, Non-ferrous), By End-User (Automotive, Aerospace and Defense, Construction, Electrical and Electronics, Manufacturing and Industrial Sectors, Consumer Appliances, Others)

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## Abstracts

The Scrap Metal Recycling Market is valued at USD 62.34 billion in 2025 and is projected to grow at a CAGR of 7.8% to reach USD 122.6 billion by 2034.

### Scrap Metal Recycling Market

The scrap metal recycling market centres on the collection, processing, sorting, and re introduction of metal waste (both ferrous and non ferrous) into the manufacturing value chain, enabling new production with lower energy input, reduced raw material extraction and improved circular economy credentials. The primary flows include end of life steel structures, automotive bodies, appliances, industrial castings, copper wiring, aluminium packaging and other metal scrap streams. Major trends include increasing use of advanced sorting, shredding and separation technologies; heightened traceability and certification of scrap for “clean steel” or recycled content claims; growth of electric arc furnace (EAF) steelmaking which relies heavily on high quality scrap as feedstock; and stronger regulation promoting recycling targets, landfill diversion and scrap export restrictions. Growth drivers include steady global demand for metals in construction, automotive, infrastructure, electronics and packaging, combined with scarcity and higher cost of primary metal production, energy intensive nature of virgin metal processing, and corporate sustainability commitments. On the competitive front, the market comprises global scrap processing companies, regional metal recyclers,

downstream smelting/steel makers with captive scrap operations, and logistic/collection firms; key success criteria include scrap grade quality, supply chain reliability, global export/import networks, separation and cleaning technology, and cost of logistics. Other important factors include metal price volatility (which influences scrap value and sourcing), regulatory controls on scrap trade and exports, regional scrap collection infrastructure, and integration of scrap sourcing with manufacturing. Overall, the market is expanding as manufacturers increasingly view recycled metal as both a cost and sustainability lever in a resource constrained world.

## Scrap Metal Recycling Market Key Insights

EAF steel making boost drives demand for high quality scrap Electric arc furnaces use scrap as their primary feedstock and are expanding globally; this accelerates demand for uniform, clean scrap streams, particularly in ferrous markets.

Energy and carbon intensity advantage of scrap recycling Recycling scrap metal typically requires far less energy (sometimes up to around 60-90% less) compared to primary metal production, making recycled metal increasingly attractive under decarbonisation goals.

Construction, automotive and electronics are major end uses As these sectors grow, scrap generation rises (from vehicles, buildings, appliances, electronics) and the supply side for recyclers expands; concurrently, manufacturers seek recycled content in new metal production.

Regional trade flows and export /import controls matter Scrap metal is globally traded; many regions with strong manufacturing require imports of processed scrap, while exporters face increasing regulation or restrictions – which impacts scrap pricing and logistics.

Grade and quality differentiation are becoming critical “Clean” scrap (sorted, low contamination) commands higher value; processors investing in better sorting, sensor technology and fragmenting achieve better margins and preferred supplier status.

Metal price volatility introduces risk and opportunity When commodity metal prices spike, scrap becomes more valuable; conversely when metal prices fall, scrap margins compress and collections may slow. Recyclers must navigate this

cyclicality.

Emerging markets offer strong growth potential. Regions such as Asia Pacific, Latin America and Africa are increasing infrastructure build, industrialisation and scrap generation; at the same time, there is growing capacity for local recycling, providing volume growth opportunities.

Circular economy and regulatory pressures strengthen business case. Governments and corporates are increasingly focused on recycled content, landfill diversion and resource efficiency; scrap recycling feeds directly into this and is often supported by policy incentives.

Logistics, collection infrastructure and informal sector integration remain challenges. Scrap sourcing depends on collection networks, sorting centres, transport logistics; many regions rely on informal collectors and low efficiency operations, which creates opportunity for formalised, high quality supply chain players.

M&A, consolidation and vertical integration gaining momentum. Larger metal producers and scrap processors are acquiring or partnering to secure scrap feedstock and integrate recycling with manufacturing – this trend supports scale economies, quality control and supply security.

## Scrap Metal Recycling Market Regional Analysis

### North America

In North America, the scrap metal recycling market is buoyed by mature infrastructure - automotive recycling, demolition operations, appliance collection - and strong demand for recycled content from steel and aluminium producers. Electric arc furnace steelmaking growth supports ferrous scrap demand. The region also emphasises regulatory oversight, traceability and landfill diversion. Growth is moderate given saturated collection infrastructure but steady as refurbishment and replacement cycles continue. Companies with efficient logistics, local collection networks and downstream integration have a competitive edge.

### Europe

Europe is characterised by high regulatory standards (recycled content targets, waste management laws, export controls on scrap), strong manufacturing base for recycled metals and established recycling infrastructures. The scrap metal recycling market benefits from both domestic collection and intra European trade. Growth is steady though constrained by declining collection volumes in mature markets and competition from upstream virgin metal imports. Key differentiators include high quality sorting, certification (e.g., for low contaminant scrap) and local service/processing capabilities.

### Asia Pacific

Asia Pacific is the fastest growing region for scrap metal recycling, driven by rapid urbanisation, expanding automotive and electronics manufacturing, large infrastructure build out and growing domestic and export scrap flows. Countries such as China and India generate large volumes of scrap and are also major consumers of recycled metal feedstock. The region presents both high volumes and high growth potential. Localisation, investment in processing and logistics, and formalisation of collection systems are important success factors.

### Middle East & Africa

In Middle East & Africa, growth is linked to oil & gas, infrastructure build out, heavy industry expansion and increased decommissioning of large assets (e.g., oil rigs, refineries). However, collection and processing infrastructure is less developed, and informal sectors dominate in many countries. Export of scrap is common. Players that invest in collection, sorting, and downstream integration and that address logistic/port challenges are better positioned to capture growth.

### South & Central America

In South & Central America, the scrap metal recycling market is supported by growing automotive, mining and construction sectors and by increasing recognition of circular economy benefits. However, growth is moderated by collection system inefficiencies, infrastructure and price sensitivity. Suppliers that provide cost efficient, locally supported scrap processing and that address logistics and informal sector integration can capture share in this region.

## Scrap Metal Recycling Market Segmentation

### By Metal

Ferrous

Non-ferrous

## By End-User

Automotive

Aerospace and Defense

Construction

Electrical and Electronics

Manufacturing and Industrial Sectors

Consumer Appliances

Others

## Key Market players

Sims Metal Management, Schnitzer Steel, Nucor Corporation, Aurubis, EMR (European Metal Recycling), OmniSource Corporation, DOWA Holdings, TSR Recycling, ArcelorMittal, Kuusakoski, Commercial Metals Company, Steel Dynamics, Alter Trading, Hensel Recycling, Chiho Environmental Group

## Scrap Metal Recycling Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are

incorporated to assess their impact on future market performance.

## Scrap Metal Recycling Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

### Countries Covered

#### North America — Scrap Metal Recycling market data and outlook to 2034

United States

Canada

Mexico

#### Europe — Scrap Metal Recycling market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Scrap Metal Recycling market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Scrap Metal Recycling market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Scrap Metal Recycling market data and outlook to 2034

Brazil

Argentina

Chile

Peru

\* We can include data and analysis of additional countries on demand.

## Research Methodology

This study combines primary inputs from industry experts across the Scrap Metal Recycling value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

## Key Questions Addressed

What is the current and forecast market size of the Scrap Metal Recycling industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

## Your Key Takeaways from the Scrap Metal Recycling Market Report

Global Scrap Metal Recycling market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Scrap Metal Recycling trade, costs, and supply chains

Scrap Metal Recycling market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Scrap Metal Recycling market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Scrap Metal Recycling market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Scrap Metal Recycling supply chain analysis

Scrap Metal Recycling trade analysis, Scrap Metal Recycling market price analysis, and Scrap Metal Recycling supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Scrap Metal Recycling market news and developments

## Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

\* The updated report will be delivered within 3 working days

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