

Chemical Recycling and Waste Valorization Services Market Forecasts to 2032 - Global Analysis By Feedstock (Plastics, Biomass & Organic Waste and Industrial Waste Streams), Service Type, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Chemical Recycling and Waste Valorization Services Market is accounted for \$19.80 billion in 2025 and is expected to reach \$98.72 billion by 2032 growing at a CAGR of 25.8% during the forecast period. Chemical recycling and waste valorization services provide sustainable solutions by converting plastic, industrial, and other waste into reusable materials or energy, fostering circular economy practices. Utilizing technologies like pyrolysis, gasification, and catalytic processes, these services decompose complex waste into valuable chemicals, fuels, or building blocks for new products. By preventing landfill accumulation and reducing reliance on virgin resources, chemical recycling strengthens resource efficiency and sustainable production. Waste valorization adds economic advantage by transforming by-products and residues into marketable products, delivering both financial and environmental benefits. Collectively, these services enable industries to minimize ecological impact while aligning with global sustainability and carbon reduction initiatives.

According to the United Nations Environment Programme (UNEP) Global Waste Management Outlook 2024, data shows that global municipal solid waste generation is projected to rise from 2.1 billion tonnes in 2020 to 3.8 billion tonnes annually by 2050 under a business-as-usual scenario.

Market Dynamics:

Driver:

Rising plastic and industrial waste

Growing plastic and industrial waste volumes are key drivers of the chemical recycling and waste valorization services market. Accelerated urbanization, industrialization, and evolving consumption behaviors have generated unprecedented waste levels, challenging traditional disposal methods. Chemical recycling and valorization processes offer effective solutions by transforming waste into reusable materials, energy, and valuable chemicals. Businesses increasingly adopt these technologies to efficiently handle waste while mitigating environmental harm. Heightened awareness of sustainability and the pressing need to tackle the global waste problem further stimulate market growth. As a result, chemical recycling emerges as an essential tool for addressing the rising accumulation of plastic and industrial waste, supporting environmental and economic objectives simultaneously.

Restraint:

High capital and operational costs

The chemical recycling and waste valorization market faces challenges due to high initial and operational costs. Developing sophisticated recycling facilities requires large investments in technology, equipment, and skilled personnel. Ongoing expenses, such as energy consumption, maintenance, and process supervision, add to financial pressures, particularly affecting smaller enterprises. These cost considerations often hinder companies from adopting chemical recycling solutions despite their environmental benefits. The substantial upfront and running costs remain a significant barrier to widespread implementation. Therefore, addressing financial constraints through funding mechanisms, cost reduction strategies, or partnerships is essential to enable broader adoption and support sustainable growth in the chemical recycling and waste valorization market.

Opportunity:

Growing demand for sustainable products

Increasing global emphasis on sustainable products offers significant growth potential for chemical recycling and waste valorization services. Both consumers and industries are favoring environmentally responsible materials, recycled chemicals, and sustainable

packaging, creating demand for innovative recycling solutions. Chemical recycling allows the conversion of waste into high-quality raw materials that comply with environmental and regulatory standards. Companies can capitalize on this trend by producing green products, improving brand reputation, and gaining a competitive advantage. Integrating recycling services with sustainability initiatives helps businesses attract eco-conscious customers, open new market avenues, and reduce environmental footprints, driving market growth and establishing chemical recycling and waste valorization as essential components of the sustainable products ecosystem.

Threat:

Technological risks and failures

Technological failures and associated risks pose challenges for the chemical recycling and waste valorization market. Processes like pyrolysis, gasification, and depolymerization depend on complex machinery and precise operating conditions. Equipment malfunctions, inefficiencies, or design shortcomings can reduce production, cause delays, and result in financial losses. High maintenance demands and limited technical expertise further amplify these risks. Businesses introducing innovative or untested technologies face uncertainties regarding process reliability, scalability, and performance consistency. Such technological vulnerabilities can discourage investment and slow adoption rates. Implementing dependable, well-maintained, and efficient systems is critical to minimize risks and support sustainable growth in the chemical recycling and waste valorization industry.

Covid-19 Impact:

The COVID-19 outbreak disrupted the chemical recycling and waste valorization services market by affecting supply chains, lowering industrial output, and delaying infrastructure projects. Restrictions on movement and lockdown measures limited waste collection and transport, reducing the availability of feedstock for recycling processes. Recycling plants experienced temporary closures or operated at reduced capacity due to workforce constraints and health protocols. Investment in new facilities and technological development slowed, delaying innovation and expansion plans. Despite these challenges, the pandemic emphasized the critical need for sustainable waste management and circular economy adoption. While causing short-term setbacks, COVID-19 reinforced the strategic importance and long-term growth potential of chemical recycling and waste valorization services.

The plastics segment is expected to be the largest during the forecast period

The plastics segment is expected to account for the largest market share during the forecast period due to their extensive use and the environmental impact of plastic waste. Rapid growth in packaging, consumer goods, and industrial applications has caused a surge in plastic waste generation. Advanced chemical recycling processes are particularly effective at converting various plastic types into valuable raw materials, fuels, and chemicals, making plastics a primary focus for recycling initiatives. Increasing regulatory pressure and sustainability goals further emphasize proper plastic waste management. As a result, plastics remain the leading segment, receiving the most attention and investment within the chemical recycling and waste valorization services market.

The packaging segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the packaging segment is predicted to witness the highest growth rate due to the escalating use of single-use and multilayer packaging materials worldwide. Growth in e-commerce, food, and consumer product packaging generates large volumes of waste, creating opportunities for chemical recycling solutions. Advanced recycling technologies convert packaging waste into valuable monomers, chemicals, and fuels, supporting circular economy efforts. Regulatory mandates, sustainability-focused policies, and increasing corporate environmental responsibility further drive investment in packaging waste recycling. As a result, the packaging segment is growing faster than other industries, propelled by increasing waste volumes, demand for sustainable materials, and efforts to minimize environmental impact.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by advanced waste management infrastructure, stringent environmental regulations, and high industrial activity. Efficient collection, sorting, and recycling systems in the region enable processing of plastics, industrial residues, and other waste types effectively. Government programs promoting sustainable practices, including single-use plastic restrictions and financial incentives, encourage the adoption of chemical recycling solutions. Corporate sustainability commitments and increasing environmental consciousness among consumers and industries further strengthen market growth. With strong technological capabilities, robust R&D activities, and favorable policies, North America remains the dominant region in chemical recycling

and waste valorization services, attracting investments and fostering innovation in advanced recycling technologies.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to rapid urban growth, industrial expansion, and increasing waste production. Countries including China, India, and Japan are witnessing substantial rises in plastic and industrial waste, driving the need for advanced chemical recycling solutions. Government policies supporting circular economy initiatives, environmental compliance, and sustainable waste management are fueling market adoption. Growing environmental awareness among consumers and the corporate shift toward green practices further boost growth. Expanding infrastructure, technological advancements, and increasing investments make Asia-Pacific the fastest-growing region, offering significant opportunities for chemical recycling and waste valorization services in the coming years.

Key players in the market

Some of the key players in Chemical Recycling and Waste Valorization Services Market include Agilyx, BASF SE, Veolia Environnement S.A., SABIC, JEPLAN, Inc., ExxonMobil Corporation, Eastman Chemical Company, Recycling Technologies, INEOS AG, Waste Management, Inc., SUEZ SA, Covanta Holding Corporation, Brightmark, Plastic Energy and Loop Industries, Inc.

Key Developments:

In November 2025, Veolia Environnement SA has entered into a definitive agreement with Enviri Corp. of Philadelphia, in which it will acquire 100 percent of Clean Earth for aggregate cash consideration of \$3.04 billion. The board of directors for both companies have unanimously approved the transaction, which is expected to close mid-2026, pending regulatory approval and subject to Enviri shareholder approval.

In July 2025, BASF and Equinor have signed a long-term strategic agreement for the annual delivery of up to 23 terawatt hours of natural gas over a ten-year period. The contract secures a substantial share of BASF's natural gas needs in Europe. This agreement further strengthens our partnership with BASF. Natural gas not only provides energy security to Europe but also critical feedstock to European industries.

In July 2025, Agilyx has entered into a binding agreement to acquire 44% of GreenDot, aiming to strengthen Agilyx's presence in the European market and create a global platform for sourcing and supplying feedstock to the advanced recycling industry.

Feedstocks Covered:

Plastics

Biomass & Organic Waste

Industrial Waste Streams

Service Types Covered:

Collection & Sorting

Processing & Conversion

Valorization Services

End Users Covered:

Packaging

Automotive

Construction

Textiles

Industrial & Utilities

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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