

Circular Chemical Recycling Market Forecasts to 2034 – Global Analysis By Polymer Type (Polyethylene, Polypropylene, Polyethylene Terephthalate, Polystyrene, Polyvinyl Chloride, Polyamide and Other Polymers), Recycling Technology, Feedstock, Recovered Product, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Circular Chemical Recycling Market is accounted for \$3.6 billion in 2026 and is expected to reach \$12.4 billion by 2034 growing at a CAGR of 16.7% during the forecast period. Circular chemical recycling refers to advanced plastic waste conversion technologies that depolymerize or crack post-consumer and post-industrial polymer waste back into monomer building blocks, chemical feedstocks, or pyrolysis oils for re-polymerization into virgin-quality plastics and chemical products. These technologies include pyrolysis, gasification, depolymerization, and solvolysis processes that complement mechanical recycling by handling mixed, contaminated, or multilayer plastic waste streams otherwise sent to landfill or incineration.

Market Dynamics:

Driver:

Plastic Circularity Mandates

Stringent plastic circularity mandates, extended producer responsibility frameworks, and recycled-content requirements are accelerating investment in chemical recycling infrastructure worldwide. Governments and regulators are increasingly establishing

targets for incorporating recycled materials into packaging and consumer products, creating demand for chemically recycled polymers and intermediate feedstocks. European Union packaging regulations and emerging U.S. state-level recycled-content mandates are particularly supporting market development. As mechanical recycling remains constrained by contamination, polymer degradation, and mixed-plastic waste streams, chemical recycling is gaining importance as a complementary pathway for achieving circularity targets.

Restraint:

High Capital and Operating Costs

High capital expenditure and operating costs represent major barriers to the commercial scalability of chemical recycling technologies. Pyrolysis, gasification, and depolymerization facilities require sophisticated reactors, feedstock preparation systems, emission-control equipment, and downstream purification infrastructure, resulting in substantial initial investment. Thermal conversion processes can also be energy intensive, increasing operating expenses and exposing projects to fluctuations in energy prices. Furthermore, inconsistent feedstock quality, competitive waste procurement costs, and volatile recovered-product prices can compress operating margins, making favorable policy incentives and economies of scale important for project viability.

Opportunity:

Textile Waste Chemical Recycling

Chemical recycling of textile waste, particularly polyester and polyamide fibers, represents a significant emerging opportunity for market expansion. Increasing fashion-industry sustainability commitments, extended producer responsibility policies, and restrictions on textile disposal are encouraging brands and recyclers to develop fiber-to-fiber recycling capabilities. Technologies capable of depolymerizing polyester textiles into purified monomers can produce virgin-quality feedstocks suitable for manufacturing new apparel fibers. Similarly, chemical recycling of polyamide materials can recover valuable polymer building blocks. Growing demand for recycled-content textiles and traceable circular supply chains is creating additional commercialization opportunities.

Threat:

Oil and Virgin Plastic Price Volatility

Volatility in crude oil prices and virgin polymer markets creates a significant competitive threat to chemical recycling economics. When oil prices decline, petrochemical

producers can manufacture virgin plastics at lower costs, potentially widening the price gap between virgin and chemically recycled materials. This can reduce customers' willingness to pay premiums for recycled feedstocks, particularly in price-sensitive packaging applications. Chemical recyclers may therefore experience margin pressure during periods of weak oil prices. Limited mechanisms for consistently monetizing recycled-content benefits further expose projects to fluctuations in global commodity markets.

COVID-19 Impact

The COVID-19 pandemic temporarily disrupted chemical recycling markets by reducing commercial and industrial activity, interrupting waste collection systems, and affecting the availability of plastic waste feedstocks. At the same time, healthcare, e-commerce, and food-delivery activities increased consumption of single-use plastics and packaging materials, creating additional waste volumes. Supply-chain disruptions and project delays initially slowed infrastructure development. However, the pandemic also strengthened government and corporate focus on waste resilience, resource efficiency, and packaging sustainability. Subsequent regulatory initiatives and circular-economy strategies helped restore investment momentum and supported chemical recycling infrastructure development.

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

The Polyethylene segment is expected to account for the largest market share during the forecast period, primarily because polyethylene represents one of the largest volumes of plastic packaging waste generated globally. Its relatively established pyrolysis pathways enable conversion into pyrolysis oil and hydrocarbon feedstocks that can potentially be upgraded for petrochemical applications and polymer production. Extensive use of polyethylene in food packaging, consumer goods, films, bottles, containers, and industrial products ensures a substantial and geographically diverse feedstock base. Increasing collection and sorting capabilities are further improving opportunities for polyethylene chemical recycling.

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

Over the forecast period, the Pyrolysis segment is predicted to witness the highest growth rate, supported by increasing commercial-scale project development across Europe, North America, and Asia Pacific. Continuous technological improvements are enhancing conversion efficiency, increasing liquid oil yields, reducing unwanted char formation, and improving feedstock flexibility. Integration of pyrolysis oil with existing refinery and petrochemical infrastructure is also helping recyclers develop scalable downstream pathways. Advances in catalytic pyrolysis, thermal cracking, reactor design, and purification technologies are expected to improve process economics and

support wider adoption for difficult-to-recycle plastic waste.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by significant chemical recycling investments from major petrochemical, packaging, and waste-management companies. U.S. state-level recycled-content requirements, particularly those targeting packaging applications, are encouraging manufacturers to secure reliable supplies of recycled feedstocks. The region also benefits from abundant plastic waste availability, established petrochemical value chains, sophisticated refining infrastructure, and strong technological capabilities. Existing refinery infrastructure can facilitate the upgrading and co-processing of pyrolysis-derived feedstocks, supporting commercial deployment and strengthening North America's overall market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by substantial plastic waste generation, rapid industrialization, and expanding investments in circular-economy infrastructure. China, India, Japan, South Korea, and Southeast Asian economies are implementing initiatives aimed at improving plastic waste management, increasing recycling rates, and reducing dependence on virgin polymers. Growing packaging consumption and manufacturing activity are generating significant recyclable feedstock volumes. Government policies promoting resource efficiency, combined with investments from petrochemical companies and technology providers, are expected to accelerate chemical recycling capacity development throughout the region.

Key players in the market

Some of the key players in Global Circular Chemical Recycling Market include BASF SE, Dow Inc., LyondellBasell Industries N.V., SABIC, Eastman Chemical Company, ECircular Chemical Recycling on Mobil Corporation, TotalEnergies SE, INEOS AG, Borealis AG, Indorama Ventures Public Company Limited, Repsol S.A., OMV AG, Agilyx Corporation, Plastic Energy Ltd., Encina Development Group LLC, Loop Industries, Inc., Carbios SA, and Quantafuel ASA.

Key Developments:

In August 2026, BASF SE announced commissioning of a new commercial-scale pyrolysis facility for mixed plastic waste conversion to feedstock.

In July 2026, LyondellBasell Industries N.V. expanded its advanced recycling capacity with a new chemical recycling plant in Texas, US.

In June 2026, SABIC announced a joint venture with a technology partner for developing an integrated chemical recycling complex in Saudi Arabia.

Polymer Types Covered:

Polyethylene

Polypropylene

Polyethylene Terephthalate

Polystyrene

Polyvinyl Chloride

Polyamide

Other Polymers

Recycling Technologies Covered:

Pyrolysis

Depolymerization

Gasification

Dissolution-Based Recycling

Solvolysis

Enzymatic Recycling

Hybrid Chemical Recycling

Feedstocks Covered:

Post-Consumer Plastic Waste

Post-Industrial Plastic Waste

Mixed Plastic Waste

Contaminated Plastic Waste

Composite and Multilayer Plastic Waste

Textile and Polymer Waste

Other Chemical Recycling Feedstocks

Recovered Products Covered:

Pyrolysis Oil

Monomers

Chemical Feedstocks

Syngas

Polymer Precursors

Recycled Polymer Resins

Other Recovered Chemicals

Applications Covered:

Packaging

Automotive

Construction

Consumer Goods

Electronics and Electrical

Textiles

Chemicals and Manufacturing

End Users Covered:

Packaging Manufacturers

Chemical and Polymer Manufacturers

Automotive Manufacturers

Consumer Goods Manufacturers

Construction Companies

Electronics Manufacturers

Waste Management and Recycling Companies

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY POLYMER TYPE

- 5.1 Polyethylene
 - 5.1.1 High-Density Polyethylene
 - 5.1.2 Low-Density Polyethylene
- 5.2 Polypropylene
- 5.3 Polyethylene Terephthalate
- 5.4 Polystyrene
- 5.5 Polyvinyl Chloride
- 5.6 Polyamide
- 5.7 Other Polymers

6 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY RECYCLING TECHNOLOGY

- 6.1 Pyrolysis
 - 6.1.1 Thermal Pyrolysis
 - 6.1.2 Catalytic Pyrolysis
- 6.2 Depolymerization
 - 6.2.1 Glycolysis
 - 6.2.2 Methanolysis
 - 6.2.3 Hydrolysis
- 6.3 Gasification
- 6.4 Dissolution-Based Recycling
- 6.5 Solvolysis
- 6.6 Enzymatic Recycling
- 6.7 Hybrid Chemical Recycling

7 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY FEEDSTOCK

- 7.1 Post-Consumer Plastic Waste
 - 7.1.1 Household Plastic Waste
 - 7.1.2 Commercial Plastic Waste
- 7.2 Post-Industrial Plastic Waste
- 7.3 Mixed Plastic Waste

- 7.4 Contaminated Plastic Waste
- 7.5 Composite and Multilayer Plastic Waste
- 7.6 Textile and Polymer Waste
- 7.7 Other Chemical Recycling Feedstocks

8 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY RECOVERED PRODUCT

- 8.1 Pyrolysis Oil
- 8.2 Monomers
- 8.3 Chemical Feedstocks
- 8.4 Syngas
- 8.5 Polymer Precursors
- 8.6 Recycled Polymer Resins
- 8.7 Other Recovered Chemicals

9 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY APPLICATION

- 9.1 Packaging
 - 9.1.1 Food and Beverage Packaging
 - 9.1.2 Consumer Packaging
- 9.2 Automotive
- 9.3 Construction
- 9.4 Consumer Goods
- 9.5 Electronics and Electrical
- 9.6 Textiles
- 9.7 Chemicals and Manufacturing

10 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY END USER

- 10.1 Packaging Manufacturers
- 10.2 Chemical and Polymer Manufacturers
- 10.3 Automotive Manufacturers
- 10.4 Consumer Goods Manufacturers
- 10.5 Construction Companies
- 10.6 Electronics Manufacturers
- 10.7 Waste Management and Recycling Companies

11 GLOBAL CIRCULAR CHEMICAL RECYCLING MARKET, BY GEOGRAPHY

- 11.1 North America
 - 11.1.1 United States
 - 11.1.2 Canada
 - 11.1.3 Mexico
- 11.2 Europe
 - 11.2.1 United Kingdom
 - 11.2.2 Germany
 - 11.2.3 France
 - 11.2.4 Italy
 - 11.2.5 Spain
 - 11.2.6 Netherlands
 - 11.2.7 Belgium
 - 11.2.8 Sweden
 - 11.2.9 Switzerland
 - 11.2.10 Poland
 - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia
 - 11.3.6 Indonesia
 - 11.3.7 Thailand
 - 11.3.8 Malaysia
 - 11.3.9 Singapore
 - 11.3.10 Vietnam
 - 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia

11.5.1.2 United Arab Emirates

11.5.1.3 Qatar

11.5.1.4 Israel

11.5.1.5 Rest of Middle East

11.5.2 Africa

11.5.2.1 South Africa

11.5.2.2 Egypt

11.5.2.3 Morocco

11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

12.1 Industry Value Network and Supply Chain Assessment

12.2 White-Space and Opportunity Mapping

12.3 Product Evolution and Market Life Cycle Analysis

12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

13.1 Mergers and Acquisitions

13.2 Partnerships, Alliances, and Joint Ventures

13.3 New Product Launches and Certifications

13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

14 COMPANY PROFILES

14.1 BASF SE

14.2 Dow Inc.

14.3 LyondellBasell Industries N.V.

14.4 SABIC

14.5 Eastman Chemical Company

14.6 ECircular Chemical Recycling on Mobil Corporation

14.7 TotalEnergies SE

14.8 INEOS AG

14.9 Borealis AG

14.10 Indorama Ventures Public Company Limited

14.11 Repsol S.A.

14.12 OMV AG

- 14.13 Agilyx Corporation
- 14.14 Plastic Energy Ltd.
- 14.15 Encina Development Group LLC
- 14.16 Loop Industries, Inc.
- 14.17 Carbios SA
- 14.18 Quantafuel ASA

List Of Tables

LIST OF TABLES

Table 1 Global Circular Chemical Recycling Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Circular Chemical Recycling Market Outlook, By Polymer Type (2023-2034) (\$MN)

Table 3 Global Circular Chemical Recycling Market Outlook, By Polyethylene (2023-2034) (\$MN)

Table 4 Global Circular Chemical Recycling Market Outlook, By High-Density Polyethylene (2023-2034) (\$MN)

Table 5 Global Circular Chemical Recycling Market Outlook, By Low-Density Polyethylene (2023-2034) (\$MN)

Table 6 Global Circular Chemical Recycling Market Outlook, By Polypropylene (2023-2034) (\$MN)

Table 7 Global Circular Chemical Recycling Market Outlook, By Polyethylene Terephthalate (2023-2034) (\$MN)

Table 8 Global Circular Chemical Recycling Market Outlook, By Polystyrene (2023-2034) (\$MN)

Table 9 Global Circular Chemical Recycling Market Outlook, By Polyvinyl Chloride (2023-2034) (\$MN)

Table 10 Global Circular Chemical Recycling Market Outlook, By Polyamide (2023-2034) (\$MN)

Table 11 Global Circular Chemical Recycling Market Outlook, By Other Polymers (2023-2034) (\$MN)

Table 12 Global Circular Chemical Recycling Market Outlook, By Recycling Technology (2023-2034) (\$MN)

Table 13 Global Circular Chemical Recycling Market Outlook, By Pyrolysis (2023-2034) (\$MN)

Table 14 Global Circular Chemical Recycling Market Outlook, By Thermal Pyrolysis (2023-2034) (\$MN)

Table 15 Global Circular Chemical Recycling Market Outlook, By Catalytic Pyrolysis (2023-2034) (\$MN)

Table 16 Global Circular Chemical Recycling Market Outlook, By Depolymerization (2023-2034) (\$MN)

Table 17 Global Circular Chemical Recycling Market Outlook, By Glycolysis (2023-2034) (\$MN)

Table 18 Global Circular Chemical Recycling Market Outlook, By Methanolysis

(2023-2034) (\$MN)

Table 19 Global Circular Chemical Recycling Market Outlook, By Hydrolysis

(2023-2034) (\$MN)

Table 20 Global Circular Chemical Recycling Market Outlook, By Gasification

(2023-2034) (\$MN)

Table 21 Global Circular Chemical Recycling Market Outlook, By Dissolution-Based Recycling (2023-2034) (\$MN)

Table 22 Global Circular Chemical Recycling Market Outlook, By Solvolysis (2023-2034) (\$MN)

Table 23 Global Circular Chemical Recycling Market Outlook, By Enzymatic Recycling (2023-2034) (\$MN)

Table 24 Global Circular Chemical Recycling Market Outlook, By Hybrid Chemical Recycling (2023-2034) (\$MN)

Table 25 Global Circular Chemical Recycling Market Outlook, By Feedstock (2023-2034) (\$MN)

Table 26 Global Circular Chemical Recycling Market Outlook, By Post-Consumer Plastic Waste (2023-2034) (\$MN)

Table 27 Global Circular Chemical Recycling Market Outlook, By Household Plastic Waste (2023-2034) (\$MN)

Table 28 Global Circular Chemical Recycling Market Outlook, By Commercial Plastic Waste (2023-2034) (\$MN)

Table 29 Global Circular Chemical Recycling Market Outlook, By Post-Industrial Plastic Waste (2023-2034) (\$MN)

Table 30 Global Circular Chemical Recycling Market Outlook, By Mixed Plastic Waste (2023-2034) (\$MN)

Table 31 Global Circular Chemical Recycling Market Outlook, By Contaminated Plastic Waste (2023-2034) (\$MN)

Table 32 Global Circular Chemical Recycling Market Outlook, By Composite and Multilayer Plastic Waste (2023-2034) (\$MN)

Table 33 Global Circular Chemical Recycling Market Outlook, By Textile and Polymer Waste (2023-2034) (\$MN)

Table 34 Global Circular Chemical Recycling Market Outlook, By Other Chemical Recycling Feedstocks (2023-2034) (\$MN)

Table 35 Global Circular Chemical Recycling Market Outlook, By Recovered Product (2023-2034) (\$MN)

Table 36 Global Circular Chemical Recycling Market Outlook, By Pyrolysis Oil (2023-2034) (\$MN)

Table 37 Global Circular Chemical Recycling Market Outlook, By Monomers (2023-2034) (\$MN)

Table 38 Global Circular Chemical Recycling Market Outlook, By Chemical Feedstocks (2023-2034) (\$MN)

Table 39 Global Circular Chemical Recycling Market Outlook, By Syngas (2023-2034) (\$MN)

Table 40 Global Circular Chemical Recycling Market Outlook, By Polymer Precursors (2023-2034) (\$MN)

Table 41 Global Circular Chemical Recycling Market Outlook, By Recycled Polymer Resins (2023-2034) (\$MN)

Table 42 Global Circular Chemical Recycling Market Outlook, By Other Recovered Chemicals (2023-2034) (\$MN)

Table 43 Global Circular Chemical Recycling Market Outlook, By Application (2023-2034) (\$MN)

Table 44 Global Circular Chemical Recycling Market Outlook, By Packaging (2023-2034) (\$MN)

Table 45 Global Circular Chemical Recycling Market Outlook, By Food and Beverage Packaging (2023-2034) (\$MN)

Table 46 Global Circular Chemical Recycling Market Outlook, By Consumer Packaging (2023-2034) (\$MN)

Table 47 Global Circular Chemical Recycling Market Outlook, By Automotive (2023-2034) (\$MN)

Table 48 Global Circular Chemical Recycling Market Outlook, By Construction (2023-2034) (\$MN)

Table 49 Global Circular Chemical Recycling Market Outlook, By Consumer Goods (2023-2034) (\$MN)

Table 50 Global Circular Chemical Recycling Market Outlook, By Electronics and Electrical (2023-2034) (\$MN)

Table 51 Global Circular Chemical Recycling Market Outlook, By Textiles (2023-2034) (\$MN)

Table 52 Global Circular Chemical Recycling Market Outlook, By Chemicals and Manufacturing (2023-2034) (\$MN)

Table 53 Global Circular Chemical Recycling Market Outlook, By End User (2023-2034) (\$MN)

Table 54 Global Circular Chemical Recycling Market Outlook, By Packaging Manufacturers (2023-2034) (\$MN)

Table 55 Global Circular Chemical Recycling Market Outlook, By Chemical and Polymer Manufacturers (2023-2034) (\$MN)

Table 56 Global Circular Chemical Recycling Market Outlook, By Automotive Manufacturers (2023-2034) (\$MN)

Table 57 Global Circular Chemical Recycling Market Outlook, By Consumer Goods

Manufacturers (2023-2034) (\$MN)

Table 58 Global Circular Chemical Recycling Market Outlook, By Construction Companies (2023-2034) (\$MN)

Table 59 Global Circular Chemical Recycling Market Outlook, By Electronics Manufacturers (2023-2034) (\$MN)

Table 60 Global Circular Chemical Recycling Market Outlook, By Waste Management and Recycling Companies (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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