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Construction and Demolition Waste Recycling Market Forecasts to 2034 – Global Analysis By Waste Material Type (Concrete, Bricks & Masonry, Metals, Wood, Asphalt, Glass, Plastics, Soil, Sand & Gravel, and Other Waste Material Types), Source, Service Type, Equipment, Application, End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Construction and Demolition Waste Recycling Market is accounted for $89.0 billion in 2026 and is expected to reach $136.6 billion by 2034 growing at a CAGR of 5.5% during the forecast period. Construction and demolition (C&D) waste recycling involves the collection, sorting, processing, and repurposing of materials generated from building, renovation, and demolition activities. This market plays a critical role in reducing landfill burden, conserving natural resources, and lowering carbon emissions associated with virgin material extraction. Recycled aggregates, metals, wood, plastics, and glass are increasingly substituted for raw materials in new construction projects, driven by stringent environmental regulations and growing corporate sustainability commitments across the global building industry.

Market Dynamics:

Driver:

Stringent government regulations on landfill disposal

Governments worldwide are implementing aggressive policies restricting the landfilling of construction and demolition waste, compelling contractors to adopt recycling solutions. Many jurisdictions have introduced landfill taxes, disposal bans, and mandatory recycling targets that directly impact project economics. For example, European Union member states must recycle at least 70% of non-hazardous C&D waste under the Waste Framework Directive. These regulatory pressures transform

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waste management from an optional expense to a compliance necessity, driving consistent demand for recycling infrastructure. Contractors increasingly partner with recycling facilities to avoid penalties while benefiting from reduced disposal costs and potential revenue from recovered materials.

Restraint:

High initial investment for recycling infrastructure

Establishing advanced C&D waste recycling facilities requires substantial capital expenditure for specialized equipment including crushers, screens, magnetic separators, and optical sorters. Smaller waste management companies and contractors often lack the financial resources to develop in-house recycling capabilities, forcing them to rely on third-party processors with limited regional availability. The long payback periods, typically ranging from five to ten years depending on material volumes and local market conditions, further discourage private investment. Additionally, fluctuating prices for recycled materials compared to virgin alternatives create financial uncertainty, making it difficult to secure financing for new recycling facility development in many regions.

Opportunity:

Growing adoption of circular economy principles in construction

The construction industry's embrace of circular economy models presents significant opportunities for C&D waste recycling expansion. Architects and engineers increasingly design buildings for deconstruction rather than demolition, specifying materials that can be easily separated and reintroduced into manufacturing supply chains. Major construction firms are establishing closed-loop systems where recycled concrete, steel, and asphalt from their own projects feed directly into new developments. This shift creates predictable demand streams for recyclers while reducing transportation costs. Green building certifications such as LEED and BREEAM now award significant points for recycled content and waste diversion, further incentivizing adoption across commercial and residential projects.

Threat:

Contamination and mixed waste stream challenges

The presence of hazardous substances and non-recyclable materials within C&D waste poses serious threats to recycling efficiency and viability. Paint residues, asbestos, treated wood, adhesives, and insulation materials can contaminate otherwise recyclable concrete, bricks, and metals, requiring costly manual sorting or rendering entire batches unacceptable for reuse. Mixed demolition waste from older structures is particularly problematic, as materials were not originally designed for separation. Stringent quality standards for recycled aggregates intended for structural applications mean that contamination can lead to significant revenue losses. These challenges increase processing costs and limit the range of applications where recycled materials can be

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confidently deployed.
Covid-19 Impact:
The COVID-19 pandemic caused significant disruption to the construction and demolition waste recycling market through project delays and labor shortages. Lockdowns halted many demolition and renovation activities, sharply reducing waste volumes entering recycling facilities during 2020. However, government stimulus packages targeting infrastructure development later created renewed demand for recycled aggregates. The pandemic also accelerated digital transformation in waste management, with contactless weighing systems and remote monitoring becoming standard. Supply chain vulnerabilities exposed during the crisis highlighted the value of locally sourced recycled materials as a resilient alternative to imported virgin resources, strengthening the long-term market position of regional recycling operations.
The Concrete segment is expected to be the largest during the forecast period
The Concrete segment is expected to account for the largest market share during the forecast period, reflecting concrete's dominance as the primary material in global construction activities. Demolished buildings and infrastructure projects generate massive volumes of concrete rubble, which can be crushed and screened to produce recycled concrete aggregate (RCA) for road bases, drainage layers, and non-structural concrete applications. The technology for concrete recycling is well-established and cost-effective compared to other waste materials, with crushers and screens readily available across developed markets. Growing acceptance of RCA in construction specifications, combined with significant cost savings over virgin aggregates, ensures concrete maintains its leading position throughout the forecast timeline.
The Renovation & Remodeling segment is expected to have the highest CAGR during the forecast period
Over the forecast period, the Renovation & Remodeling segment is predicted to witness the highest growth rate, driven by aging building stock across developed economies and changing lifestyle demands. Homeowners and businesses increasingly choose renovation over new construction due to high land costs, permitting challenges, and sustainability preferences for retaining existing structures. Each renovation project generates diverse waste materials requiring specialized recycling approaches, including old cabinetry, flooring, windows, and fixtures. The fragmented nature of renovation waste streams creates opportunities for mobile recycling units and smaller-scale processing facilities. Government incentives for energy-efficient retrofits further accelerate renovation activity, directly expanding the addressable waste stream for recyclers serving this dynamic segment.
Region with largest share:
During the forecast period, the North America region is expected to hold the largest market share, supported by well-established recycling infrastructure and stringent state-

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level landfill diversion mandates. The United States generates approximately 600 million tons of C&D waste annually, with leading states such as California and Massachusetts implementing aggressive recycling targets above 65%. Mature markets for recycled aggregates in road construction and land development provide consistent demand channels, while tax incentives for recycling equipment investment encourage continuous facility modernization. Major construction firms have integrated waste management into project planning, creating predictable recycling volumes that support facility economics and reinforcing North America's market leadership throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid urbanization, infrastructure expansion, and emerging regulatory frameworks across China, India, and Southeast Asian nations. China's aggressive waste import bans have paradoxically accelerated domestic recycling capacity development, with major cities establishing large-scale C&D waste processing facilities. India's Smart Cities Mission incorporates mandatory waste management provisions, while rapid demolition of informal housing creates substantial recycling opportunities. The region's scarcity of natural aggregates in rapidly growing coastal cities makes recycled alternatives economically attractive. As environmental awareness increases and landfill space diminishes across densely populated areas, Asia Pacific emerges as the fastest-growing market for C&D waste recycling services.

Key players in the market

Some of the key players in Construction and Demolition Waste Recycling Market include Veolia Environnement S.A., SUEZ S.A., Waste Management Inc., Republic Services Inc., Clean Harbors Inc., Biffa plc, FCC Environment, Remondis SE & Co. KG, DS Smith plc, Renewi plc, Casella Waste Systems Inc., Advanced Disposal Services Inc., GFL Environmental Inc., Stericycle Inc., and Covanta Holding Corporation.

Key Developments:

In April 2026, Renewi published the "Circular Reality Scan 2026," revealing a significant gap between recycling intent and action in the Benelux region, while highlighting the company's push for more consistent circular behavior through its "waste-to-product" model.

In March 2026, Republic Services showcased advancements in organics processing and the scaling of sustainable material recovery centers to support the rising demand for circular construction materials.

In February 2026, GFL confirmed it deployed nearly $1 billion into accretive M&A during 2025 and finalized the recapitalization of Green Infrastructure Partners to focus more heavily on high-margin recycling services.

Waste Material Types Covered:

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- Concrete
- Bricks & Masonry
- Metals
- Wood
- Asphalt
- Glass
- Plastics
- Soil, Sand & Gravel
- Other Waste Material Types

Sources Covered:

- Construction
- Demolition
- Renovation & Remodeling

Service Types Covered:

- Collection
- Transportation
- Sorting & Processing
- Recycling
- Disposal

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Equipments Covered:

- Crushers
- Screens
- Shredders
- Separators
- Conveyors
- Other Equipments

Applications Covered:

- Residential
- Commercial
- Industrial
- Infrastructure

End Users Covered:

- Contractors & Builders
- Waste Management Companies
- Government & Municipal Authorities
- Recycling Companies

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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

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- 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

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- 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

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  - 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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13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

14 COMPANY PROFILES

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List Of Tables

LIST OF TABLES

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Table 38 Global Construction and Demolition Waste Recycling Market Outlook, By 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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