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Nonferrous Metal Recycling Market Forecasts to 2032 - Global Analysis By Metal Type (Aluminum, Copper, Lead, Zinc, Nickel, and Other Metal Types), Scrap Type (New Scrap (Manufacturing Waste), and Old Scrap (Post-Consumer Waste)), Source of Scrap, Recycling Method, End User, and By Geography

https://marketpublishers.com/r/N637CE718AE2EN.html
Date: June 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: N637CE718AE2EN

Abstracts

According to Stratistics MRC, the Global Nonferrous Metal Recycling Market is growing at a CAGR of 5.3% during the forecast period. Nonferrous metal recycling involves the collection, processing, and reuse of metals that do not contain significant amounts of iron. These metals, including aluminum, copper, lead, zinc, and nickel, retain their chemical properties through repeated recycling. The process reduces environmental impact, conserves natural resources, and supports energy efficiency. Nonferrous metals are widely used in construction, automotive, electronics, and aerospace industries, making their recycling vital for sustainable industrial development and circular economy practices.

According to the United States Environmental Protection Agency (EPA), recycling of nonferrous metals like aluminum, copper, and brass significantly reduces energy consumption, saving up to 95% of the energy required to produce metals from raw ore.

Market Dynamics:

Driver:

Growing demand for nonferrous metals

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The rising demand for nonferrous metals such as aluminum, copper, and zinc is a key driver for the nonferrous metal recycling market. This surge is propelled by their extensive use in rapidly expanding sectors like construction, automotive, consumer electronics, and renewable energy. Furthermore, the ability of nonferrous metals to be recycled repeatedly without losing their properties ensures a sustainable supply, reducing reliance on primary mining and supporting circular economy initiatives. Additionally, environmental regulations and increased societal awareness further stimulate demand for recycled nonferrous metals, bolstering market growth.

Restraint:

Inadequate recycling infrastructure

Many regions, particularly in developing economies, face challenges such as insufficient collection systems, outdated processing technologies, and a lack of standardized practices. These limitations hinder efficient recovery and processing of nonferrous metals, leading to higher operational costs and reduced recycling rates. Moreover, inconsistent supply chains and limited investment in modern facilities further exacerbate the issue, restricting the market's ability to meet growing demand and comply with increasingly stringent environmental regulations.

Opportunity:

Growth of e-waste and automotive recycling

The proliferation of electronic devices and electric vehicles is generating significant volumes of end-of-life products rich in valuable nonferrous metals like copper, aluminum, and rare earth elements. Moreover, regulatory mandates for proper e-waste disposal and the push for sustainable automotive manufacturing are encouraging investment in advanced recycling technologies. Additionally, urban mining and closed-loop recycling systems are emerging, further enhancing the recovery of nonferrous metals from complex waste streams and driving market growth.

Threat:

Competition from virgin metal production

Fluctuations in global commodity prices can make primary metal production more economically attractive, reducing the competitiveness of recycled materials. The

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availability of cheaper virgin metals, particularly in regions with abundant natural resources, can undermine recycling initiatives. Additionally, technological advancements in primary metal extraction and processing may further challenge the recycling sector.

Covid-19 Impact:

The Covid-19 pandemic had a pronounced negative impact on the nonferrous metal recycling market. Lockdowns and restrictions led to the temporary closure of recycling facilities, disrupted supply chains, and caused a sharp decline in industrial activity across sectors such as construction, automotive, and manufacturing. This resulted in reduced availability and demand for recycled nonferrous metals. Additionally, price volatility and logistical challenges further strained the market. However, as economies gradually reopened, recovery began, supported by renewed demand and the adoption of improved waste management practices.

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

The aluminum segment is expected to account for the largest market share during the forecast period. Aluminum's dominance stems from its widespread application in industries such as construction, automotive, and packaging, where its lightweight, corrosion resistance, and high recyclability are highly valued. The ability to recycle aluminum indefinitely without loss of quality makes it a preferred material for manufacturers seeking cost-effective and environmentally responsible solutions. Additionally, the energy savings achieved through recycling aluminum, compared to primary production, further amplify its market share.

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

Over the forecast period, the chemical recycling segment is predicted to witness the highest growth rate. Chemical recycling technologies enable the breakdown of complex nonferrous metal-containing products, such as e-waste and multi-material composites, into their base elements for efficient recovery. Advancements in chemical processes enhance metal purity and yield, supporting the recycling of previously challenging waste streams. Additionally, the rising emphasis on sustainability and resource efficiency is driving investment in innovative chemical recycling solutions, positioning this segment for accelerated expansion.

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Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share. This dominance is attributed to rapid industrialization, urbanization, and substantial investments in infrastructure across countries like China and India. The region’s strong manufacturing base, increasing environmental awareness, and government policies promoting circular economy practices bolster recycling activities. Additionally, the presence of large-scale recycling operations and growing demand from the construction, automotive, and electronics sectors further reinforce Asia Pacific’s leading position in the global market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. The region’s robust economic growth, expanding urban populations, and rising consumer demand for durable goods drive the need for sustainable raw materials. Stringent environmental regulations and increasing investments in advanced recycling technologies are accelerating market expansion. Additionally, initiatives to improve waste management systems and the integration of innovative recycling processes position Asia Pacific as the fastest growing region.

Key players in the market

Some of the key players in Nonferrous Metal Recycling Market include Sims Limited, Aurubis AG, Umicore NV, Novelis Inc., Glencore plc, European Metal Recycling (EMR), Dowa Holdings Co., Ltd., OmniSource Corporation, SA Recycling LLC, Commercial Metals Company (CMC), Nucor Corporation, Metallo-Chimique, Jintian Copper (Ningbo Jintian Copper Group Co., Ltd.), Sungho Group, Toho Zinc Co., Ltd., Scholz Recycling GmbH, Radius Recycling and Gravita India Ltd.

Key Developments:

In April 2025, DOWA ECO-SYSTEM CO., LTD. a subsidiary of DOWA HOLDINGS CO., LTD. plans to construct a base facility for its environmental management and recycling business in Kumamoto in 2025. This initiative is in response to Japan’s increasing demand for products and services contributing to resource recycling and decarbonization in Japan. To further expand its business, the company has decided to establish a complex base facility for its environmental management and recycling business (hereinafter the 'New Base') in the North Kanto area, following the one in

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Kyushu. For this purpose, the company has acquired an industrial site in Section 2 of Oyama No.4 Industrial Park, which will be newly established in Oyama City, Tochigi.

In October 2024, Novelis, the world's largest recycler of aluminum and leading supplier of flat-rolled, low-carbon aluminum products, has entered into a strategic 3-year agreement with TSR Recycling GmbH & Co. KG. The contract strengthens the long-standing partnership between Novelis and TSR, ensuring a reliable supply of raw materials made from presorted and processed end-of-life aluminum products of approximately 75,000 tonnes to be fed into Novelis' production of low-carbon aluminum sheet for the automotive sector.

Metal Types Covered:

- Aluminum
- Copper
- Lead
- Zinc
- Nickel
- Other Metal Types

Scrap Types Covered:

- New Scrap (Manufacturing Waste)
- Old Scrap (Post-Consumer Waste)

Source of Scraps Covered:

- Manufacturing & Fabrication Industries
- Construction & Demolition (C&D) Waste

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End-of-Life Vehicles (ELV) / Automotive Scrap

Waste Electrical and Electronic Equipment (WEEE) / E-waste

Other Post-Consumer Products

Recycling Methods Covered:

Physical Recycling

Thermal Recycling

Chemical Recycling

Electrochemical Recycling

End Users Covered:

Automotive & Transportation

Building & Construction

Electrical & Electronics

Industrial Machinery

Consumer Appliances & Goods

Packaging

Energy & Power

Aerospace & Defense

Other End Users

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Regions Covered:

- North America
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  - 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

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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

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- 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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