

Upcycling and Waste-to-Value Services Market Forecasts to 2034 – Global Analysis By Waste Source (Municipal Solid Waste (MSW), Industrial Waste, Agricultural & Organic Waste, Construction & Demolition Waste and Electronic Waste (E-Waste)), Conversion Approach, Service Model, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Upcycling and Waste-to-Value Services Market is accounted for \$4.7 billion in 2026 and is expected to reach \$8.1 billion by 2034 growing at a CAGR of 7.0% during the forecast period. Upcycling and Waste-to-Value Services convert waste materials, industrial residues, and consumer discards into higher-value goods and useful inputs. These approaches strengthen circular economy systems by minimizing landfill use, reducing environmental harm, and preserving natural resources. Sectors like textiles, packaging, construction, and electronics are increasingly integrating these solutions to generate economic value from waste streams. Emerging technologies such as advanced recycling, material recovery, and resource regeneration improve operational efficiency and scalability. Governments and companies encourage adoption through sustainability policies, incentives, and regulations, fostering innovation in waste utilization while generating new business opportunities and supporting environmentally responsible manufacturing practices worldwide across globe.

According to the Food and Agriculture Organization (FAO), roughly 1.3 billion metric tons of food is wasted globally each year, representing about one-third of all food produced for human consumption. This waste generates significant greenhouse gas emissions and resource losses, which directly supports the need for upcycling and

waste-to-value services.

Market Dynamics:

Driver:

Rising circular economy adoption

The growing focus on circular economy practices strongly supports the expansion of the upcycling and waste-to-value services market. Many governments and industries are moving away from traditional linear production systems toward circular models that emphasize reuse, recycling, and efficient resource utilization. This shift motivates organizations to redesign products and operations to reduce waste and improve material recovery rates. Businesses are increasingly adopting advanced upcycling technologies to prolong product lifespans and reduce reliance on new raw materials. As sustainability objectives align with circular economy strategies, demand for waste-to-value solutions continues to rise across manufacturing, construction, and consumer industries worldwide.

Restraint:

Lack of standardized infrastructure and collection systems

Insufficient infrastructure and weak waste collection networks are major challenges limiting the upcycling and waste-to-value services market. In many regions, waste segregation practices are inconsistent, and recycling systems are poorly developed. Inefficient collection methods often result in contamination of recyclable materials, lowering their quality and value. The lack of standardized procedures across different areas makes it difficult to manage and process waste efficiently. This also increases operational costs and reduces overall system performance. Without strong infrastructure and coordinated waste management frameworks, expanding upcycling activities on a large scale becomes difficult, restricting market growth worldwide.

Opportunity:

Technological innovation in recycling and material recovery

Advancements in recycling and material recovery technologies create strong opportunities for the upcycling and waste-to-value services market. New developments

like artificial intelligence-based sorting, robotic automation, chemical recycling, and digital monitoring systems are improving operational efficiency and scalability. These innovations allow for more accurate separation of waste materials and higher recovery of usable resources. They also help reduce processing costs and improve the quality of recycled outputs, making them more competitive with raw materials. Ongoing research and technological progress in waste management are enabling the conversion of a wider range of waste streams into valuable products across global industries.

Threat:

Competition from low-cost virgin materials

The availability of low-cost virgin raw materials poses a significant threat to the upcycling and waste-to-value services market. When prices of new materials are cheaper, industries tend to favor them over recycled alternatives due to cost advantages and perceived quality consistency. This reduces the demand for upcycled outputs and affects the profitability of waste-to-value operations. Many businesses still consider virgin materials more dependable and easier to obtain. Such competition limits investments in recycling systems and infrastructure development. As long as virgin materials remain economically attractive, the expansion and competitiveness of the upcycling industry will continue to face challenges worldwide.

Covid-19 Impact:

The COVID-19 pandemic created both challenges and opportunities for the upcycling and waste-to-value services market. In the early stages, supply chain disruptions, workforce shortages, and restrictions on industrial activity reduced recycling efficiency and waste collection operations. While commercial waste declined due to lockdowns, medical and plastic waste increased significantly. At the same time, the crisis raised global awareness about sustainability and resource optimization. Governments and industries began focusing more on circular economy strategies during recovery efforts. The pandemic also accelerated the adoption of digital and automated waste management systems, ultimately supporting long-term growth of sustainable waste-to-value solutions worldwide.

The municipal solid waste (MSW) segment is expected to be the largest during the forecast period

The municipal solid waste (MSW) segment is expected to account for the largest market

share during the forecast period because it is generated consistently and in large quantities from residential and commercial activities in urban regions. It comprises common waste materials such as food residues, plastics, paper, and glass, which are widely accessible and easier to manage compared to other waste categories. Municipal authorities and governments prioritize MSW handling through organized collection systems and recycling programs aimed at reducing landfill dependency. Strong regulatory support and established infrastructure further reinforce its position, making MSW the most dominant and influential segment in the global market.

The energy & biofuels segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the energy & biofuels segment is predicted to witness the highest growth rate, driven by strong global demand for cleaner and renewable energy sources. The shift away from fossil fuels and increasing environmental concerns are promoting the conversion of organic and industrial waste into bioenergy, biogas, and advanced biofuel products. Improvements in technologies such as gasification, anaerobic digestion, and waste-to-energy conversion are boosting efficiency and scalability. Supportive government policies, subsidies, and sustainability initiatives are further encouraging adoption. Rising focus on energy security and circular economy practices is making this segment the fastest growing category worldwide globally.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share because of its highly developed recycling systems, strict environmental regulations, and strong commitment to circular economy practices. Many European countries have implemented advanced waste management infrastructure that supports efficient material recovery and reuse. Policies such as landfill bans, carbon reduction targets, and sustainability mandates encourage industries to adopt upcycling solutions. Continuous investment in green technologies and innovation further strengthens the region's dominance, making Europe the most established and influential market for waste-to-value services worldwide across global markets.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rapid industrial growth, urban expansion, and rising waste production in developing economies. Major countries such as China, India, Japan, and South

Korea are actively enhancing waste management infrastructure and promoting circular economy strategies. Strong government initiatives focused on sustainability and recycling are supporting market development. Increasing population density and manufacturing activities are generating large waste volumes, boosting demand for recovery solutions. Furthermore, growing environmental awareness and rising investments in green technologies are accelerating the region's overall market growth significantly across industries.

Key players in the market

Some of the key players in Upcycling and Waste-to-Value Services Market include Biffa plc, Covanta, Daiseki Co., Ltd., Eurokey Recycling, Ltd., FCC Environment Limited, Hitachi Zosen Corporation, Northstar Recycling, Remondis SE & Co. KG, SUEZ, Triple M Metal LP, Urbaser, Veolia Environnement S.A., TerraCycle, AMP Robotics, Precious Plastic, FabScrap, Interface and Bureo.

Key Developments:

In February 2026, Veolia has secured two 15-year operations and maintenance (O&M) contracts for Mumbai's upcoming Bhandup and Panjrapur Water Treatment Plants (WTPs), strengthening its presence in India's municipal water sector. The contracts mark the largest municipal water sector agreements signed by a French company in India. The combined treatment capacity of the two plants will be 2,910 million litres per day (MLD), equivalent to 2.91 million cubic metres per day.

In May 2025, FCC Environment is pleased to confirm a two-year extension to its long-standing contract with Harborough District Council, continuing a successful partnership that began in 2009. The extension will see FCC Environment maintain its delivery of a wide range of frontline environmental services across the district.

In April 2025, SUEZ and the CNRS have signed a five-year framework agreement to combine their R&D efforts and develop innovative solutions to promote sustainable resource management and new decarbonisation technologies. This framework agreement aims to pool together SUEZ's innovation capabilities and the CNRS' scientific excellence.

Waste Sources Covered:

Municipal Solid Waste (MSW)

Industrial Waste

Agricultural & Organic Waste

Construction & Demolition Waste

Electronic Waste (E-Waste)

Conversion Approaches Covered:

Mechanical Upcycling

Chemical Conversion

Biological Conversion

Energy Recovery & Waste-to-Fuel Solutions

Service Models Covered:

Collection & Sorting Services

Processing Services

Product Development Services

Consulting & Advisory Services

End Users Covered:

Consumer Goods & Lifestyle Products

Industrial Raw Materials

Energy & Biofuels

Construction Materials

Specialty Chemicals & Rare Metals

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:

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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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