

Urban Recycling Market Forecasts to 2034 – Global Analysis By Material Type (Paper and Cardboard, Plastics, Metals, Glass, Organic Waste, Electronic Waste, Construction and Demolition Waste, Textiles, and Other Recyclable Materials), Recycling Process, Collection Model, Technology, End Use, and By Geography

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Abstracts

According to Statistics MRC, the Global Urban Recycling Market is accounted for \$71.5 billion in 2026 and is expected to reach \$102.5 billion by 2034 growing at a CAGR of 4.6% during the forecast period. Urban recycling encompasses the collection, sorting, processing, and conversion of municipal solid waste into reusable materials, reducing landfill disposal and environmental impact. The market encompasses material types including paper and cardboard, plastics, metals, glass, organic waste, electronic waste, construction and demolition waste, textiles, and other recyclable materials. Recycling processes include collection and transportation, sorting and material recovery, processing and recycling, composting and organic recycling, waste-to-material conversion, and secondary material manufacturing. Collection models include curbside collection, drop-off collection, buy-back and deposit systems, community collection, commercial collection, and smart and automated collection. Growing environmental concerns, regulatory requirements for recycling, and circular economy initiatives are key drivers of market expansion.

Market Dynamics:

Driver:

Growing environmental concerns and regulatory requirements for recycling

The increasing global concern about waste management and environmental sustainability is a primary driver for the urban recycling market. Governments worldwide are implementing regulations requiring recycling, setting recycling targets, and restricting landfill disposal. Extended producer responsibility (EPR) regulations hold manufacturers accountable for packaging waste. Consumer awareness of environmental issues is driving demand for recycled materials. Corporate sustainability commitments include recycled content targets. As environmental concerns intensify and regulations tighten, demand for urban recycling services and infrastructure expands, supporting sustained market growth.

Restraint:

Contamination and quality challenges in recycled materials

The significant challenges of contamination in recycling streams and quality limitations of recycled materials represent a major restraint for the urban recycling market. Mixed or contaminated recyclables reduce material value and processing efficiency. Consumer confusion about what can be recycled leads to contamination. Quality variations in recycled materials may limit their use in certain applications. These contamination and quality challenges increase processing costs and reduce market value for recycled materials.

Opportunity:

Advancements in sorting and processing technologies

Continuous innovation in sorting and processing technologies presents significant opportunities for urban recycling market expansion. AI-based waste recognition and robotic sorting are improving separation efficiency and accuracy. Optical sorting technologies enable precise material identification. Advanced processing technologies are improving recycled material quality. As technology advances and processing capabilities improve, recycling economics improve, capturing growing market share.

Threat:

Competition from virgin materials and waste-to-energy

Competition from virgin materials at lower costs and waste-to-energy alternatives poses significant threats to urban recycling market growth. Virgin materials often cost less than recycled alternatives. Waste-to-energy incineration competes for waste feedstock. Low

oil prices can make virgin plastics more cost-competitive. This competition may limit recycling demand, particularly in price-sensitive markets.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the urban recycling market. Initial disruptions included reduced collection services and processing slowdowns. Concerns about virus transmission temporarily affected recycling practices. However, the pandemic accelerated focus on sustainability and circular economy principles. Government stimulus packages included green infrastructure investment. Post-pandemic, continued sustainability focus has supported market recovery and growth.

The Paper and Cardboard segment is expected to be the largest during the forecast period

The Paper and Cardboard segment is expected to account for the largest market share during the forecast period, driven by high recycling rates, established collection infrastructure, and strong market demand for recycled paper products. Paper and cardboard are among the most recycled materials globally, with well-established processing infrastructure. The segment benefits from e-commerce growth driving cardboard packaging demand. Recycled paper and cardboard are used in packaging, newsprint, and tissue products. As the most established recycling category, paper and cardboard maintain the largest material type segment share.

The AI-Based Waste Recognition segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the AI-Based Waste Recognition segment is predicted to witness the highest growth rate, fueled by the need for improved sorting accuracy, reducing contamination, and increasing processing efficiency. AI-based waste recognition uses computer vision and machine learning to identify and sort materials with high precision. The segment benefits from advancements in AI technology and declining sensor costs. Improving recycling quality and economics drive adoption. As recycling facilities upgrade with AI capabilities, this technology delivers the fastest segment growth.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market

share, supported by stringent recycling regulations, established infrastructure, and strong environmental awareness. The European Union's circular economy policies and recycling targets drive market growth. High consumer participation in recycling programs supports collection volumes. Advanced processing infrastructure enables high-quality recycling. With strong regulatory drivers and market maturity, Europe maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rapid urbanization, increasing waste generation, and growing government initiatives to improve waste management. Countries including China, India, and Southeast Asian nations are investing in recycling infrastructure. Growing environmental awareness supports market expansion. As recycling infrastructure develops and regulations tighten, Asia Pacific delivers the fastest urban recycling market growth globally.

Key players in the market

Some of the key players in Urban Recycling Market include Veolia Environnement S.A., SUEZ S.A., Waste Management, Inc., Republic Services, Inc., Remondis SE & Co. KG, Biffa plc, Renewi plc, Waste Connections, Inc., TOMRA Systems ASA, Sims Limited, Casella Waste Systems, Inc., FCC Environment, Clean Harbors, Inc., Stericycle, Inc., and Covanta Holding Corporation.

Key Developments:

In May 2026, SUEZ expanded its circular economy footprint with a ?396 million municipal contract extension in Milton Keynes and initiated construction of an advanced anaerobic digestion plant to accommodate mandatory food waste collection regulations.

In February 2026, Republic Services announced it invested \$1.1 billion in acquisitions throughout 2025 and earmarked an additional \$1 billion for acquisitions in 2026 to further expand its recycling, solid waste, and circular economy infrastructure.

In January 2026, TOMRA announced the operational acceleration of deposit return systems (DRS) and sensor-based municipal waste sorting across Europe to align with the Packaging and Packaging Waste Regulation (PPWR).

Material Types Covered:

Paper and Cardboard

Plastics

Metals

Glass

Organic Waste

Electronic Waste

Construction and Demolition Waste

Textiles

Other Recyclable Materials

Recycling Processes Covered:

Collection and Transportation

Sorting and Material Recovery

Processing and Recycling

Composting and Organic Recycling

Waste-to-Material Conversion

Secondary Material Manufacturing

Collection Models Covered:

Curbside Collection

Drop-Off Collection

Buy-Back and Deposit Systems

Community Collection

Commercial Collection

Smart and Automated Collection

Technologies Covered:

Automated Sorting

Optical Sorting

AI-Based Waste Recognition

Robotic Sorting

IoT-Based Collection Monitoring

Digital Tracking and Material Traceability

End Uses Covered:

Recycled Packaging Materials

Recycled Construction Materials

Recycled Consumer Products

Recycled Industrial Materials

Recycled Textiles and Fibers

Recycled Agricultural Materials

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

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