

Waste-Derived Construction Aggregates Market Forecasts to 2034 – Global Analysis By Material Type (Concrete Aggregates, Asphalt Pavement, Masonry & Bricks, Glass Aggregates, Plastics & Polymers, and Mining Tailings & Slag), Processing Technology, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Waste-Derived Construction Aggregates Market is accounted for \$9.2 billion in 2026 and is expected to reach \$26.2 billion by 2034 growing at a CAGR of 13.9% during the forecast period. Waste-derived construction aggregates refer to particulate materials recovered, processed, and repurposed from industrial, municipal, and demolition waste streams for use as substitutes for virgin natural aggregates in road base, concrete production, asphalt paving, railway ballast, and drainage applications. They encompass recycled concrete aggregates, reclaimed asphalt pavement, crushed glass aggregates, waste plastic granules, and mining tailings and slag processed through crushing, screening, washing, thermal treatment, or chemical stabilization pathways to achieve specification-grade performance for civil engineering and building constructions.

Market Dynamics:

Driver:

Construction Waste Regulation Mandates

Construction waste regulation mandates across major economies are compelling contractors, demolition operators, and material producers to divert aggregates from

landfill and incorporate processed waste-derived alternatives into new construction projects. EU Construction and Demolition Waste Framework recycled content requirements, U.S. state green procurement specifications, and embodied carbon reduction targets for infrastructure projects are generating compliance-driven procurement for specification-grade waste-derived aggregate products. Government circular economy policy frameworks are establishing minimum recycled aggregate content mandates for publicly funded infrastructure projects that anchor baseline market demand for waste-derived aggregate producers.

Restraint:

Quality Variability and Specification Risks

Quality variability and performance specification concerns represent persistent adoption barriers for waste-derived construction aggregates, as heterogeneous waste stream composition creates consistency challenges that make contamination risk management technically demanding for aggregate processors. Structural engineers and pavement designers specify conservative recycled aggregate content limits in high-performance applications due to uncertainty about long-term durability and leachate behavior compared to well-characterized natural aggregate alternatives. Regulatory approval processes for novel waste material streams in aggregate production require extensive laboratory characterization and field trial evidence that impose substantial time and cost burdens on new entrant processors.

Opportunity:

Infrastructure Decarbonization Programs

Infrastructure decarbonization programs mandating embodied carbon reduction across road, bridge, and building construction are generating premium procurement demand for waste-derived construction aggregates that reduce lifecycle carbon footprints versus virgin quarried materials. Government green public procurement policies in Europe, North America, and Asia Pacific are establishing recycled aggregate content requirements and environmental product declaration standards that position waste-derived aggregates competitively against conventional supply. Growing contractor corporate sustainability commitments are generating voluntary procurement beyond regulatory minimums, expanding the addressable market for certified low-carbon waste-derived aggregate products in private development and large-scale infrastructure delivery contracts.

Threat:

Virgin Aggregate Price Competition

Virgin natural aggregate price competitiveness in regions with abundant quarry resources represents a persistent commercial threat to waste-derived aggregate market development, as low-cost crushed stone and sand and gravel supply from proximate quarrying operations undercuts recycled alternative pricing in cost-competitive construction markets. Transportation cost economics for waste-derived aggregates require proximity between waste sources, processing facilities, and construction sites that limits geographic market reach in sparsely populated regions with long transport distances. Energy cost increases for aggregate processing operations elevate production costs that erode price competitiveness versus virgin alternatives in commodity-grade application segments.

Covid-19 Impact:

COVID-19 disrupted construction activity and waste generation volumes, temporarily reducing the supply of demolition debris and industrial waste inputs into aggregate processing operations while slowing construction procurement decision cycles. Post-pandemic infrastructure stimulus investment incorporating green procurement requirements generated accelerated demand for waste-derived aggregates in publicly funded road, bridge, and building projects. Pandemic-era supply chain disruptions affecting natural aggregate quarry operations highlighted the supply resilience advantages of locally processed waste-derived aggregate supply chains that do not depend on quarry access or extraction licensing.

The plastics & polymers segment is expected to be the largest during the forecast period

The plastics & polymers segment is expected to account for the largest market share during the forecast period, due to abundant waste plastic feedstock availability from post-consumer and post-industrial plastic waste streams combined with growing regulatory pressure to divert plastic waste from incineration and landfill into value-added construction material applications. Plastic aggregate products including crumb rubber modified asphalt and polystyrene lightweight aggregate concrete are achieving code compliance across multiple national building standards. Extended producer responsibility regulations compelling plastic producers to finance end-of-life material

recovery are creating structured feedstock supply chains that support commercially viable plastic aggregate processing operations at scale.

The crushing & screening segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the crushing & screening segment is predicted to witness the highest growth rate, driven by expanding construction and demolition waste processing capacity investment that is the primary enabling technology for all waste-derived aggregate categories. Mobile and stationary crushing and screening plant deployment is accelerating as waste processors invest in higher-capacity equipment serving growing regulatory mandates for construction material recycling. Technological advancement in sensor-based sorting integrated with crushing circuits is improving output quality consistency that is progressively expanding the range of specification-grade applications accessible to waste-derived aggregate products processed through advanced crushing and screening systems.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to substantial construction and demolition waste generation volumes, growing state and federal recycled content procurement requirements for infrastructure projects, and established waste processing industry infrastructure. U.S. Federal Highway Administration recycled material specifications for road base applications are driving large-volume demand for reclaimed asphalt pavement and recycled concrete aggregates. Companies including Vulcan Materials Company, Martin Marietta Materials, and Waste Management Inc. are integrating waste-derived aggregate processing into existing quarry and waste management operations, sustaining regional market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapidly expanding construction activity generating large volumes of demolition waste requiring processing, growing urban infrastructure redevelopment in China, India, and Southeast Asian cities creating simultaneous waste supply and aggregate demand, and government circular economy policy mandates incorporating construction waste recycling targets. China's construction waste resource utilization policies are mandating minimum recycled aggregate usage rates in new construction

that are generating large-volume procurement demand. Japan's established concrete recycling infrastructure and South Korea's green construction standards are additionally driving regional market expansion.

Key players in the market

Some of the key players in Waste-Derived Construction Aggregates Market include LafargeHolcim Ltd., HeidelbergCement AG, CEMEX S.A.B. de C.V., CRH plc, Vulcan Materials Company, Martin Marietta Materials, Aggregate Industries, Boral Limited, Eurovia (Vinci Group), Veolia Environnement, Suez SA, Waste Management Inc., Republic Services, Tarmac (CRH), Hanson UK, Colas Group, Ferrovial, and Arcosa Inc.

Key Developments:

In March 2026, LafargeHolcim Ltd. launched its ECOPact Max recycled aggregate concrete range incorporating 100% waste-derived coarse aggregate content targeting zero-virgin aggregate specification-grade construction applications.

In March 2026, CEMEX S.A.B. de C.V. commissioned a new urban construction and demolition waste processing facility in Madrid producing 500,000 tonnes annually of certified recycled aggregate for infrastructure projects.

In February 2026, Veolia Environnement expanded its waste-to-aggregates processing network across three European markets through acquisition of regional construction waste recycling operators serving public infrastructure clients.

In January 2026, Colas Group deployed its advanced plastic waste aggregate technology across 25 road construction projects in France, incorporating recycled polymer granules into asphalt pavement for embodied carbon reduction.

Material Types Covered:

Concrete Aggregates

Asphalt Pavement

Masonry & Bricks

Glass Aggregates

Plastics & Polymers

Mining Tailings & Slag

Processing Technologies Covered:

Crushing & Screening

Washing & Beneficiation

Thermal Treatment (Sintering)

Chemical Stabilization

Applications Covered:

Road Base & Sub-base

Concrete Production

Asphalt Production

Railway Ballast

Drainage & Erosion Control

Landscaping & Fill

End Users Covered:

Infrastructure & Civil Engineering

Residential Construction

Commercial Construction

Industrial Construction

Other End Users

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

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