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Zero-Waste Services Market Forecasts to 2032 – Global Analysis By Service Type (Zero-Waste Consulting and Auditing, Collection, Sorting, and Segregation Services, Processing and Recycling Services, Composting and Anaerobic Digestion, and Reuse and Upcycling Services), Waste Type (Municipal Solid Waste, Construction and Demolition Waste, Organic Waste, Industrial Waste, and E-Waste and Specialized Waste Streams), End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Zero-Waste Services Market is accounted for $38.3 billion in 2025 and is expected to reach $72.3 billion by 2032, growing at a CAGR of 9.5% during the forecast period. Zero-waste services provide consulting, collection, sorting, reuse, repair, and recycling solutions aimed at minimizing waste sent to landfills and incineration. It serves municipalities, corporations, campuses, and events. Benefits include reduced disposal costs, improved resource recovery, a stronger brand reputation, compliance with waste regulations, measurable progress toward sustainability targets, and encouraging product redesign and behavioral change to prevent waste at its source.

Market Dynamics:

Driver:

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Rising Corporate Sustainability Goals

Corporations across retail, technology, and manufacturing are publicly committing to ambitious zero-waste-to-landfill and carbon neutrality targets. This corporate shift is not merely a public relations effort; it is increasingly a prerequisite for investor appeal and consumer loyalty. Consequently, businesses are actively seeking expert zero-waste service partners to audit waste streams, implement reduction strategies, and validate their sustainability claims, thereby creating a steady and expanding revenue stream for the market.

Restraint:

Lack of Standardized Infrastructure

The absence of uniform regulations for sorting, collection, and processing leads to operational inefficiencies and higher costs for service providers. This fragmentation makes it challenging to achieve the economies of scale necessary for profitable recycling and composting operations. Without a coherent, widespread system, a significant volume of material intended for diversion remains incompatible with existing processes, ultimately limiting the scalability and effectiveness of zero-waste initiatives.

Opportunity:

Circular Economy Business Models

The transition from a linear 'take-make-dispose' model to a circular one presents a significant growth avenue. This evolution encourages service providers to move beyond simple waste removal to offering consulting on product redesign, implementing take-back programs, and facilitating industrial symbiosis, where one company's waste becomes another's raw material. These value-added services deepen client relationships and open new, recurring revenue streams. Moreover, they position zero-waste firms as essential partners in building resilient, closed-loop supply chains, securing their long-term market relevance.

Threat:

Volatility in Recycled Material Markets

A sudden drop in demand or price for materials like recycled plastics or cardboard can

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render collection and processing operations economically unfeasible overnight. This volatility is often driven by geopolitical trade policies, shifting demand from manufacturers, and contamination issues. Such instability discourages long-term investment in recycling infrastructure and can force service providers to increase fees or reduce services, potentially slowing overall market adoption.

Covid-19 Impact:

The pandemic initially disrupted the zero-waste market through supply chain bottlenecks, lockdowns that halted recycling programs, and heightened safety concerns that prioritized hygiene over reusables, leading to a surge in single-use plastic waste. However, the crisis also underscored the fragility of global supply chains and the importance of resource resilience. In the longer term, this has accelerated government and corporate interest in building more sustainable, circular economies as a recovery strategy, ultimately renewing focus and creating a more favorable environment for zero-waste services post-pandemic.

The processing and recycling services segment is expected to be the largest during the forecast period

The processing and recycling services segment is expected to account for the largest market share during the forecast period, handling the vast volumes of material collected after reduction and reuse efforts. It includes essential services like Material Recovery Facilities (MRFs), composting, and anaerobic digestion, which are the backbone of waste diversion. Furthermore, increasing landfill bans and stringent government recycling targets mandate the use of these services, ensuring consistent demand. Their capital-intensive nature and established operational scale make them the primary revenue generator within the zero-waste services market.

The e-waste and specialized waste streams segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the e-waste and specialized waste streams segment is predicted to witness the highest growth rate. Rapid technological obsolescence and the global proliferation of electronic devices are fueling a dramatic increase in e-waste generation. This stream is not only growing fast but also contains valuable, critical raw materials, making its recovery economically attractive. Additionally, stringent, globally enforced regulations like the WEEE Directive require proper handling of this hazardous waste. The specialized expertise and advanced processing required for e-waste create

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a high-value niche, attracting new investments and driving the segment's exceptional growth rate.

Region with largest share:

The Europe region is expected to have the largest market share during the forecast period. This is because it has the strictest rules in the world for waste management, such as mandatory recycling goals and extended producer responsibility (EPR) laws. Decades of policy development have cultivated advanced waste infrastructure and high consumer awareness. Moreover, the European Green Deal and Circular Economy Action Plan provide a clear, top-down mandate that compels both public and private sectors to invest heavily in zero-waste solutions, securing the region's dominant market position for the foreseeable future.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by a potent mix of escalating urbanization, a growing consumer class, and a critical need to manage rampant waste generation. Governments in China, India, and Southeast Asia are implementing new policies to combat pollution and invest in modern waste management infrastructure. This, combined with increasing foreign investment and a nascent but rapidly expanding corporate sustainability focus, creates a highly dynamic environment for zero-waste service adoption and market expansion.

Key players in the market

Some of the key players in Zero-Waste Services Market include Veolia Environnement S.A., SUEZ S.A., Waste Management, Inc., Republic Services, Inc., Waste Connections, Inc., Remondis SE & Co. KG, Biffa plc, Clean Harbors, Inc., Covanta Holding Corporation, TerraCycle, Inc., Stericycle, Inc., GFL Environmental Inc., Urbaser S.A., PreZero International GmbH, Daiseki Co., Ltd., and Hitachi Zosen Corporation.

Key Developments:

In November 2025, Veolia agreed to acquire U.S.-based hazardous-waste specialist Clean Earth for about US$3 billion. The deal is designed to double Veolia’s U.S. hazardous-waste footprint and create a #2 player in the U.S. hazardous waste segment.

In September 2025, SUEZ and RATP Group (the Paris public transport operator) signed

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a long-term power-purchase agreement (PPA) under which SUEZ will supply nearly 100 GWh/year of renewable electricity (for up to 16 years) generated from household waste recovery.

In June 2025, SUEZ inaugurated a new biogenic CO? recovery unit (from anaerobic digestion of biowaste) at its “Terres d’Aquitaine” site in Saint-Selve (Gironde, France). The digestate produced received European certification marking a milestone for circular-economy and biowaste-to-resource efforts.

Service Types Covered:

- Zero-Waste Consulting and Auditing
- Collection, Sorting, and Segregation Services
- Processing and Recycling Services
- Composting and Anaerobic Digestion
- Reuse and Upcycling Services

Waste Types Covered:

- Municipal Solid Waste
- Construction and Demolition Waste
- Organic Waste
- Industrial Waste
- E-Waste and Specialized Waste Streams

End Users Covered:

- Commercial

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- Industrial
- Residential/Municipal

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia

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New Zealand

South Korea

Rest of Asia Pacific

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

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- 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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Contents

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8 GLOBAL ZERO-WASTE SERVICES MARKET, BY GEOGRAPHY

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9 KEY DEVELOPMENTS

10 COMPANY PROFILING

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List Of Tables

LIST OF TABLES

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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