

India Recyclate Market By Source Type (Paper & Cardboard, Plastic, Glass, Metal, Organic, Construction & Demolition Waste, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

The India Recyclate Market was valued at USD 6,253.29 Million in 2024 and is expected to reach USD 11,337.25 Million by 2030 with a CAGR of 10.26% during the forecast period.

The India Recyclate Market is witnessing significant growth, driven by increasing environmental concerns, stringent government regulations, and the rising adoption of circular economy principles. Recyclates, which include recycled plastics, paper, metals, and glass, are becoming integral to industries seeking sustainable raw material alternatives. With India's rapid industrialization and urbanization, the country generates a massive volume of waste, leading to a greater need for efficient recycling and waste management solutions. The government's initiatives, such as the Swachh Bharat Abhiyan, Extended Producer Responsibility (EPR) regulations, and the Plastic Waste Management Rules, are fostering the adoption of recyclates across multiple sectors, including packaging, automotive, construction, and textiles.

Key Market Drivers

Government Regulations and Policies Promoting Recycling

The Indian government has implemented several policies to encourage the recycling industry, driving significant growth in the recyclate market. The Plastic Waste Management Rules (2016, amended in 2022) introduced Extended Producer Responsibility (EPR), making manufacturers and brand owners accountable for

managing plastic waste. Additionally, the ban on single-use plastics in 2022 created demand for sustainable alternatives, increasing the need for recycled plastics. The Swachh Bharat Abhiyan and Smart Cities Mission also emphasize waste management and recycling, encouraging municipalities to adopt advanced recycling techniques. The Recycling of Ships Act (2019) promotes safe recycling practices in the ship-breaking industry, reducing environmental hazards while boosting recyclate production. Financial incentives, such as subsidies for recycling plants and tax exemptions on eco-friendly businesses, further encourage private investment. Moreover, the Indian government has committed to reducing plastic waste by 30% by 2026, enhancing the recyclate supply chain.

India imports over 1.5 million metric tons of plastic raw materials annually, while also exporting around 1 million metric tons of plastic products and materials. With state governments increasingly mandating waste segregation and plastic buyback schemes, more recycled plastic is entering the supply chain. Regulatory interventions, particularly stringent recycling quotas, are expected to create long-term growth for recyclate manufacturers. These policies create a structured and organized recycling ecosystem, ensuring higher efficiency in waste collection, processing, and reuse, thereby driving the recyclate market in India.

Key Market Challenges

Lack of Standardized Recycling Infrastructure

India's recyclate market faces significant challenges due to the lack of a standardized recycling infrastructure across states. While metropolitan cities like Delhi, Mumbai, and Bengaluru have relatively developed waste management systems, rural and semi-urban areas struggle with inadequate collection and sorting mechanisms. The country relies heavily on the informal sector, which manages over 80% of the recycling process. However, this sector operates without uniform regulations, leading to inefficiencies in waste segregation and processing.

A major issue is the fragmented supply chain, where different states have varied approaches to waste collection. For instance, some states have effective Extended Producer Responsibility (EPR) frameworks, while others lack proper monitoring mechanisms. Additionally, outdated recycling technologies lead to low-quality recyclates that do not meet global standards, limiting export opportunities.

Moreover, plastic segregation remains a major bottleneck. Most recyclers receive mixed

plastic waste, making it difficult to produce high-purity recyclates. Inconsistent labeling and improper disposal habits among consumers further compound this challenge. Unlike developed nations, where automated sorting systems are prevalent, India still depends on manual segregation, which is time-consuming and inefficient.

Addressing this issue requires investments in centralized waste processing plants, government incentives for modern recycling technologies, and a nationwide standardization policy for waste collection and segregation. Encouraging public-private partnerships (PPPs) can also help develop a more efficient, structured recycling ecosystem.

Without standardized infrastructure, recyclers struggle to maintain consistent supply and quality, ultimately affecting the industry's growth potential. Developing a cohesive, technology-driven waste management framework is crucial to overcoming this challenge and enhancing the sustainability of India's recyclate market.

Key Market Trends

Increasing Demand for Recycled Plastics in Packaging and Manufacturing

The demand for recycled plastics in India is surging, particularly in the packaging and manufacturing sectors, as industries seek sustainable alternatives to virgin plastics. With the rise in e-commerce, food delivery services, and FMCG industries, there is a growing need for eco-friendly packaging solutions. Many companies are shifting towards rPET (recycled polyethylene terephthalate) and other recyclates to meet sustainability goals and comply with government regulations.

Several multinational corporations and Indian brands are integrating recyclates into their packaging strategies. Companies such as Coca-Cola, PepsiCo, and Unilever have pledged to incorporate higher recycled content into their plastic packaging by 2030. This shift is also driven by consumer demand for environmentally responsible products, pushing manufacturers to adopt recycled plastics in packaging.

Additionally, the automobile and textile industries are utilizing recyclates to produce automotive components, synthetic fabrics, and consumer goods. For instance, the use of recycled PET (rPET) in textile fibers is gaining traction as brands move towards sustainable fashion. Automotive manufacturers are integrating recyclates into interior trims, dashboards, and insulation materials to meet sustainability targets.

With technological advancements in recycling methods, such as mechanical and chemical recycling, the quality of recyclates has improved, making them more viable for industrial applications. The development of food-grade recyclates has further expanded their use in the food and beverage sector, allowing for the creation of recycled-content bottles and containers.

As the government enforces stricter plastic waste management policies, industries will continue to embrace recyclates in their production processes. The increasing consumer awareness and corporate commitments towards sustainability will further drive demand, positioning the recyclate market for significant growth in the coming years.

Key Market Players

Ecogreen Energy WTE

Darbar Group

Trash2cash

Shri Krupa Services Pvt. Ltd.

BVG India

WM Intellectual Property Holdings, L.L.C.

ReSynergy

J.T.N Services Pvt. Ltd.

Report Scope:

In this report, the India Recyclate Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Recyclate Market, By Source Type:

Paper & Cardboard

Plastic

Glass

Metal

Organic

Construction & Demolition Waste

Others

India Recyclate Market, By Region:

North India

South India

West India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Recyclate Market.

Available Customizations:

India Recyclate Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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