

Recycled Acrylonitrile Butadiene Styrene Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Form (Granule, Others and Pellets), By Color (Black, Blue, Green, Grey, and Others), By Application (Appliances, Automotive, Consumer Goods, Medical Equipment, Construction, and Others), By Region & Competition, 2021-2031F

<https://marketpublishers.com/r/R17FEED48625EN.html>

Date: May 2026

Pages: 192

Price: US\$ 4,500.00 (Single User License)

ID: R17FEED48625EN

Abstracts

The Global Recycled Acrylonitrile Butadiene Styrene (ABS) Market is projected to expand from USD 2.51 Billion in 2025 to USD 3.26 Billion by 2031, demonstrating a 4.45% compound annual growth rate. Recycled ABS is a secondary thermoplastic resin produced by reprocessing post-consumer or post-industrial waste, predominantly from end-of-life electronics and automotive components. This market's growth is primarily fueled by stringent governmental regulations promoting circular economy practices and ambitious sustainability goals set by multinational corporations. As a result, leading manufacturers in the automotive and consumer electronics sectors are increasingly incorporating recycled materials to reduce their carbon footprint and lessen their reliance on virgin petrochemical feedstocks, indicating a fundamental shift toward sustainable sourcing that supports sustained growth.

However, the market's expansion faces significant challenges from economic pressures impacting the recycling infrastructure itself, including elevated energy costs and the competitive pricing of virgin materials. These financial strains have resulted in a notable decline in processing capabilities; preliminary data from Plastics Recyclers Europe for 2025 indicated a 50% increase in recycling facility closures, leading to an approximate loss of one million tonnes of recycling capacity over a mere three-year period. This reduction in industrial capacity poses a severe threat to ensuring a consistent, high-

volume supply of the quality recycled ABS needed to satisfy growing global demand.

Market Driver

The increasing adoption of recycled materials within the automotive and transportation sectors is fundamentally transforming demand for recycled ABS. Leading vehicle manufacturers are progressively incorporating secondary thermoplastics into both interior and structural components to reduce fleet emissions. Corporate strategies are increasingly prioritizing material recovery over the consumption of virgin resins to meet circularity standards; for instance, Volvo Car AB reaffirmed its objective in its March 2025 'Annual and Sustainability Report 2024' to integrate 25% recycled and bio-based content into new car models by 2025. Such commitments signify a lasting change in supply chain procurement, guaranteeing a steady demand for high-quality recycled acrylonitrile butadiene styrene grades.

Concurrently, the escalating generation of electronic waste is acting as a crucial feedstock driver for the market. As consumer electronics experience shorter lifecycles, the volume of end-of-life devices containing valuable engineering plastics continues to grow, necessitating robust recovery systems. According to Emew's August 2025 'Global E-waste Statistics' article, the world generated 62 million tonnes of electronic waste in 2022, representing a substantial resource for secondary resin production. However, transforming this potential into usable material requires significant infrastructure, with Plastics Recyclers Europe reporting in November 2025 that the total installed plastics recycling capacity in Europe stood at 13.5 million tonnes, highlighting the industrial base available for processing this influx.

Market Challenge

The primary obstacle hindering the Global Recycled Acrylonitrile Butadiene Styrene (ABS) Market currently is the intense economic pressure that destabilizes the financial viability of recycling operations. This issue arises from a fundamental mismatch in cost structures, where high fixed processing costs, driven by energy and labor expenses, clash with the often lower and volatile pricing of virgin petrochemical alternatives. When global oil market fluctuations cause the price of virgin ABS to fall, it undercuts the competitive pricing of recycled ABS, thereby compressing profit margins for reclaimers who cannot easily adjust their operational expenditures.

This inherent unprofitability directly impedes market expansion by eroding the capital

essential for maintaining and upgrading infrastructure. The impact of these financial challenges is evident in the sector's declining commercial performance; Plastics Recyclers Europe reported a 5.5% decrease in industry turnover to €8.6 billion in 2024. This revenue reduction limits the industry's capacity to invest in the advanced sorting and decontamination technologies required to produce high-quality recycled ABS, consequently creating a supply bottleneck that runs counter to the increasing demand for sustainable materials.

Market Trends

The advancement of Solvent-Based Dissolution Technologies is creating a vital path for producing high-purity recycled ABS that can match the performance of virgin resin. Unlike mechanical recycling, which frequently leads to downcycled products due to polymer degradation, dissolution and depolymerization processes isolate the polymer at a molecular level, effectively removing contaminants to yield compliant grades. This technological breakthrough is progressing from pilot stages to commercial application, ensuring a supply of high-quality feedstock; for instance, Packaging World reported in October 2025 that Trinseo began commercially integrating recycled styrene monomer from Indaver's Antwerp depolymerization plant, which started production in August 2025 to provide drop-in resin solutions.

Furthermore, the integration of Artificial Intelligence (AI) in feedstock sorting is significantly improving the purity of material recovery facilities that handle complex ABS waste streams. Deep learning algorithms are now being deployed to identify and separate ABS from mixed electronic waste and black plastics, a task historically difficult for near-infrared sensors due to carbon black pigmentation. These advanced systems analyze visual data to sort materials by polymer type, substantially reducing contamination. The Circulate Initiative's June 2025 article, 'Investing in Early-Stage Innovations: A Critical Step to Accelerate Plastics Circularity,' highlighted that AI technology provider Greyparrot has successfully scaled its intelligent sorting infrastructure to an estimated 140 units across 55 facilities globally, validating the industrial feasibility of automated waste characterization.

Key Market Players

BASF SE

Covestro AG

LG Chem Ltd.

Trinseo PLC

INEOS Styrolution Group GmbH

Toray Industries, Inc.

Chi Mei Corporation

Ravago Group

Avangard Innovative LP

MBA Polymers, Inc.

Veolia Environnement S.A.

Report Scope

In this report, the Global Recycled Acrylonitrile Butadiene Styrene Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Recycled Acrylonitrile Butadiene Styrene Market, By Form

Granule

Others

Pellets

Recycled Acrylonitrile Butadiene Styrene Market, By Color

Black

Blue

Green

Grey

Others

Recycled Acrylonitrile Butadiene Styrene Market, By Application

Appliances

Automotive

Consumer Goods

Medical Equipment

Construction

Others

Recycled Acrylonitrile Butadiene Styrene Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Recycled Acrylonitrile Butadiene Styrene Market.

Available Customizations:

Global Recycled Acrylonitrile Butadiene Styrene 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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