

Urban Mining Market - Global Outlook and Forecast 2022-2027

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Report description:

The global urban mining market is expected to grow at a CAGR of 13.12% during 2021-2027.

MARKET OVERVIEW

-□Urban mining is the process of recovering and reusing material from landfills. These materials may come from buildings, infrastructure, or obsolete products. When the product's functionality is over, the car is of no use, the computer becomes outdated, the building becomes unsafe, or redevelopment of existing structures, at that time, these products' material goes to landfill. The metals in cars and electronics are frequently recycled and used in newly developed cars and electronics equipment. In the urban mining market, various processes are carried out, such as collecting waste, separating waste, and finally, recycling and refining processes to extract metals & minerals from waste.

-□Rapidly growing industrial development and continuous innovation have boosted industrial waste generation. This waste generally ends up in landfills. There are a variety of interesting solutions that deals with industrial waste. Many governmental and nongovernmental entities have proposed various processes to recover some of the metals and materials from industrial waste that will satisfy the growing demand of various industries. The urban mining market aims to pull waste from landfills and reclaim non-renewable materials for recycling and reuse. The technique of retrieving raw materials from waste products delivered to landfills is known as urban mining. On a conceptual level, it views waste generated by cities and urban environments as a valuable resource, relying on urban stocks rather than geological reserves to supply manufacturing demands.

-□Modern mining technology uses a significant amount of water, which can pressure the water supply in water-scarce areas. Additionally, the water used for various mining activities can contaminate nearby waterbodies, which poses a significant threat to water resources, vital food sources, and freshwater. On the other hand, the urban mining market has helped to lower the carbon footprint due to recycling, which has a lower environmental cost than traditional mining.

-□The global urban mining market is divided into two major segments: waste type and commodities. The waste type segment is further divided into three main categories as electronic & electrical waste, construction & demolition waste, and others. Among these three segments, electronics & electrical waste is one of the largest segments in urban mining.

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MARKET TRENDS & DRIVERS

Growing Demand for Sustainable Development

- Over the past few decades, the industrial sector has been a major contributor to carbon emissions. Traditional mining activities and industrial development have contributed significantly to this carbon emission. Industries such as automotive and transportation are the major contributor to greenhouse gas emissions. The landfill also contributes significantly to greenhouse gas emissions as methane and CO₂ are emitted from landfills due to acidic reactions. Methane emissions in landfills may lead to fire accidents, resulting in more greenhouse gas emissions into the environment. Therefore, recycling this landfill waste and its management is crucial to reducing the carbon footprint, further boosting the urban mining market growth.

- The power generation industry is also focusing on reducing carbon emissions. With renewable energy, the power generation sector is practicing sustainable development. Solar panels, wind, and hydroelectric turbines require various circuit panels for electricity generation and transmission. After these electric panels are discarded, these panels are recycled, and precious metals such as gold, silver, copper, palladium, and others are refined and reused for manufacturing new electric panels. All the above factors promote sustainable development, helping the global urban mining market grow significantly during the forecasted period.

Impact of Government Regulations

- Decomposing various industrial and electronic waste will take a more lengthy and different methodology; the governments are asking various companies and people to segregate the wastes at the source. Therefore, various companies are taking the initiative to separate waste produced during various manufacturing activities. In addition, according to the United Nations, the growing volume of electronic waste, including mobile phones, laptops, televisions, refrigerators, and electrical toys, poses a significant threat to the environment and human health. Such measures by the government have contributed significantly to the urban mining market and provided opportunities for the companies to grow.

- In the United States, according to Resource Conservation and Recovery Act (RCRA) by EPA, all solid wastes or materials which have been separated for recycling shall be stored in such a manner that they do not constitute a fire, health, or safety hazard or provide food or harborage for vectors and shall be contained or bundled so as not to result in spillage. The European Commission proposed a new Batteries Regulation on 10 December 2020. This regulation ensures that batteries available in the EU market are sustainable and safe throughout their entire life cycle.

MARKET RESTRAINTS

Lack of Infrastructure and Technical Knowledge

- The shortage of innovative technology and technical knowledge in emerging countries has made the e-waste recycling industry financially unappealing to potential businesses and investors. For example, recovering rare earth materials from magnets necessitates either extensive manual labor or specialized technology. Companies that do not have access to appropriate technology are likely to face high labor expenses and rely on basic disassembly techniques that do not recover large quantities of valuable materials. As a result, costs rise while output falls, making any potential business financially unstable.

- Factors like increasing metal recovery, particularly from highly complex products, may result in high costs due to technical challenges, lower economic viability, and a higher environmental burden of the necessary processes, creating a constraint for the global urban mining market growth.

SEGMENTATION ANALYSIS

INSIGHTS BY WASTE TYPE

The global urban mining market by waste type is dominated by electronics & electrical waste and is expected to grow at a CAGR of 13.65% during the forecast period. The urban mining market utilizes a variety of e-waste, including printed circuit boards,

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laptops, mobile phones, household appliances, electric motors, and other constructions. In recent years, the demand for the consumer electronics sector is expected to grow significantly due to rapid industrial development and increasing population. Therefore, the demand for urban mining for the e-waste segment is also projected to grow. Governments and urban mining service providers are promoting e-waste recycling to reduce the carbon footprint and promote sustainable development.

Segmentation by Waste Type

- Electronics & Electrical Waste
- Construction & Demolition Waste
- Others

INSIGHTS BY COMMODITY TYPE

The precious metals category under the commodity type is the largest segment in the global urban mining market and is expected to cross USD 20.99 billion by 2027. Precious metals are used in various industries, including aerospace, medical, electronics, chemical, catalyst, and others. Because the demand from the industries mentioned above is expected to rise significantly, so will the demand for precious metals. Because traditional mining practices have a negative impact on the environment, the urban mining market is providing a better option to mitigate the environmental impact because it recycles used precious metals. The exterior designs of various cars, mobile phones, and other personal appliances use precious metals. Countries such as China, Australia, Russia, India, and the US are the world's leading producers of precious metals. Growing healthcare, pharmaceutical, electronics, electrical and automotive sector have boosted the demand for various precious metals such as rhodium, gold, silver, iridium, and palladium. This is projected to increase the urban mining activities to extract precious metals. Therefore, the urban mining market grows due to increased demand for precious metals from various industries.

Segmentation by Commodity Type

- Precious Metals
- Non-Precious Metals
- Other Commodities

GEOGRAPHICAL ANALYSIS

Europe holds the largest urban mining market share globally and is expected to cross USD 20.28 billion by 2027. Europe is home to various developed countries such as Germany, France, the UK, and Italy. These developed countries' governments have developed policies to attract investment to promote urban mining and recycling. In addition, governments have offered subsidies and incentives under various fiscal and monetary policies. The industrial development & innovation in the manufacturing sector in the Europe region is increasing rapidly as governments of countries in this region have announced some significant policy changes that will promote sustainable development.

Further, the e-waste and C&D waste recycling in Europe is increasing significantly because of stringent environmental regulations, government subsidies, and continuous innovation leading to rapid industrial development, growing population, increased disposable income, and increased use of electrical and electronic devices. In addition, the low-cost extraction of metals & minerals and the availability of advanced technology for recycling in the region have fueled the European urban mining market and is expected to dominate the industry throughout the forecast period.

Even though Europe is a dominant market in the world, many other countries with a high scope of development in urban mining will challenge Europe's dominance. Regions such as North America and APAC have a majority of developing countries with various

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growing industries that require significant infrastructure to support the daily operations of various industries. In addition, countries such as US and Japan are the developed countries in these regions that drive the urban mining market due to well-established policies and regulations for urban mining. Further, North American and APAC governments are promoting the recycling of scrap metals and e-waste by giving grants, subsidies, and loans to recycling companies, which will positively affect the urban mining market.

Segmentation by Geography

- Europe
 - o□UK
 - o□Germany
 - o□France
 - o□Italy
 - o□Russia
- North America
 - o□US
 - o□Canada
- APAC
 - o□China
 - o□Japan
 - o□South Korea
 - o□India
- Rest of the World
 - o□Turkey
 - o□Mexico
 - o□Saudi Arabia

VENDOR LANDSCAPE

The major global urban mining market players have formed strategic partnerships with various industries and construction companies, as these companies are contributing significantly to waste generation activities. This gives companies a competitive advantage that boosts their market share. The key companies have developed their waste collection and separation infrastructure that creates value for various industries. The growth in sustainable processes and initiatives has challenged all companies globally. Investments in R&D, technological advancement, and environmental and economic challenges drive the demand for innovative and sustainable processes and urban mining services.

Some key players in the global market include Umicore (Belgium), Johnson Matthey (UK), Materion Corporation (US), Boliden Group (Sweden), and Sims Limited (Australia). These players have adopted strategies such as expansion, acquisitions, new product development, joint ventures, and others to increase their revenues in the global urban mining market. Furthermore, other prominent companies such as AET Environmental (US), Arch Enterprises (US), Dowa Eco-System (Japan), ECR World (US), and others have invested significant capital in R&D to develop urban mining processes that will appeal to the customers. Therefore, these other prominent companies are giving tough competition to major companies.

Key Vendors

- Umicore
- Johnson Matthey
- Materion Corporation

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- Boliden Group
- Sims Limited

Other Prominent Vendors

- AET Environmental
- All Green Recycling
- Apex Environmental Services Inc.
- Arch Enterprises, Inc.
- Clean Harbors, Inc.
- Dowa Eco-System, Ltd.
- ECR World
- EnviroMetal Technologies Inc.
- Gannon & Scott
- Heraeus Holding
- HOBI International, Inc.
- M&K Recovery Group
- Suez Group
- Veolia
- WM Intellectual Property Holding, L.L.C.

KEY QUESTIONS ANSWERED

1. What is the revenue from the global urban mining market?
2. What is the projected market size of the global urban mining market by 2027?
3. What is the growth rate of the urban mining market?
4. Which region dominates the global urban mining market?
5. What are the key driving factors in the urban mining market?
6. Who are the key players in the global urban mining market?

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