

## **Global Waste Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Waste Management Market Analysis

The Global Waste Management Market size is estimated at USD 1.43 trillion in 2025, and is expected to reach USD 1.97 trillion by 2030, at a CAGR of greater than 6.62% during the forecast period (2025-2030).

Persistent regulatory pressure, expanding corporate zero-waste pledges, and the monetization of recovered materials are steering the waste management market away from landfill-centric models and toward integrated recovery systems. Extended Producer Responsibility (EPR) statutes in the European Union and several U.S. states are transferring disposal costs to brand owners, creating dedicated funding pools for recycling infrastructure. At the same time, the roll-out of mandatory digital tracking platforms by the U.S. EPA and the EU is spawning new data-driven service niches, while investments in waste-to-energy (WtE) facilities equipped with carbon-capture technology are unlocking carbon-negative revenue streams. Asia-Pacific held the largest regional position in 2024, and Middle East & Africa (MEA) is on track to be the fastest-growing geography through 2030 as governments allocate capital to diversion targets. E-waste represents the highest-velocity waste stream, propelled by looming electric-vehicle battery retirements.

Global Waste Management Market Trends and Insights

Extended Producer Responsibility regulations in EU & North America

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Mandatory EPR schemes now require producers to finance collection and recycling, reshaping the cost base for the waste management market. California's SB 54 compels a 25% plastic-packaging reduction by 2032 along with a 65% recycling rate, and Minnesota joined five other U.S. states with its own 2024 EPR law. The EU extended EPR to textiles in 2023, creating new compliance markets that have encouraged waste-management operators to consolidate and invest in optical-sorting and polymer-identification lines to capture EPR-funded contracts. Comparable rules introduced in Kenya in 2024 demonstrate global diffusion of the model.

#### Carbon-negative targets driving WtE investments

Net-zero commitments are channeling capital toward WtE plants equipped with post-combustion carbon capture. Metro Vancouver's facility, processing 720 t/day of refuse, placed a USD 101 million price tag on equipment that will remove 300,000 tCO<sub>2</sub>e annually, flipping the emissions balance from positive to negative. In Saudi Arabia, a WtE program converting 3 million t of municipal solid waste into fuel aims to cut 1.79 million tCO<sub>2</sub>e per year while delivering renewable electricity to the grid. Access to carbon credit markets adds a new income layer for operators.

#### Fragmented informal sector dominance in South Asia & Africa

An extensive informal workforce limits formal penetration of the waste management market. South Africa leaves 3.67 million t of household waste uncollected each year, fostering illegal dumping and eroding municipal revenues. Informal e-waste recycling in South Asia exposes workers to heavy metals, discouraging institutional investors from funding modern plants. Integrating these workers into regulated value chains requires training and capital that many local operators cannot finance, keeping collection rates low and leakage high.

Other drivers and restraints analyzed in the detailed report include:

Corporate zero-waste pledges spurring industrial recycling contracts in Asia / Mandatory digital tracking of waste flows in the U.S. and EU / Volatile recovered-commodity prices disincentivizing recycling investment /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Industrial waste retained the highest momentum in 2024 and is on course to post an 8.3% CAGR to 2030, while residential waste accounted for the largest 46.54% waste management market share that same year. Corporate emissions-reduction mandates are causing manufacturers to treat production scrap as a resource, boosting demand for on-site baling, solvent recovery, and closed-loop logistics. Eastman's USD 2.25 billion molecular-recycling roll-out, designed to handle 250 million lb of complex plastics annually, illustrates the scale of industrial opportunities. The shift is especially notable in electronics, automotive, and consumer-goods plants concentrated in China and ASEAN nations.

Residential streams, although mature, remain essential to the overall waste management market size because of rising urbanization. Governments are installing color-coded curbside programs and food-waste digesters to comply with landfill-diversion targets. Commercial waste from retail chains adds stable growth as EPR fees fund front-of-store collection infrastructure. Construction-and-demolition waste has gained policy attention; India's revised C&D rules, effective April 2025, oblige megaprojects to use recycled aggregates, generating predictable tonnage for crushers. Medical and agricultural wastes represent niche but expanding categories, with infectious-waste protocols tightened post-pandemic and agricultural biomass feeding anaerobic-digestion plants in rural zones.

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The Waste Management Market Report is Segmented by Source (Residential, Commercial [Retail, Office, Etc. ], Industrial and More), by Service Type (Collection, Transportation, Sorting & Segregation and Disposal/Treatment), by Waste Type (Municipal Solid Waste, E-Waste and More) and by Geography (North America, Europe and More). The Report Offers Market Size and Forecasts in Value (USD) for all the Above Segments.

## Geography Analysis

Asia-Pacific contributed 56% of global revenue in 2024, powered by dense manufacturing clusters and rapid urban migration that generate multi-material waste flows requiring advanced processing. China's Circular-Economy Promotion Law and Japan's Plastic Resource-Circulation Act obligate producers to design for recyclability, while India's new rules demand recycled sand and aggregate in public infrastructure. Urban authorities in Shenzhen, Tokyo, and Bengaluru have introduced pay-as-you-throw pricing that boosts household separation at source. Multinationals such as Microsoft, which achieved an 85% construction-waste diversion rate at its new Singapore data center, are executing regional recycling contracts to fulfill zero-waste pledges.

The Middle East & Africa is the fastest-expanding region, flashing a 9.1% CAGR outlook through 2030. Saudi Investment Recycling Company (SIRC) is deploying USD 625 million across refuse-derived-fuel and tire-to-oil facilities to meet Vision 2030 circular-economy milestones. The GCC Waste-to-Energy Cooperation Protocol, signed in February 2025, sets a 40% landfill-diversion target, galvanising plant EPC pipelines in Abu Dhabi, Manama, and Jeddah. Simultaneously, South Africa and Kenya are piloting digital registry systems to formalise informal collectors, though capacity gaps persist outside capital regions.

North America and Europe are mature but regulation-intensive markets. The U.S. EPA's 2025 mandate that all hazardous-waste exports traverse the e-Manifest expands data-compliance revenue. The White House strategy to phase out single-use plastics from federal procurement by 2027 is expected to ripple through supplier contracts. Europe's Waste Shipments Regulation, effective May 2024, restricts exports to non-OECD countries and requires end-to-end digital tracking by 2026.

## List of Companies Covered in this Report:

Veolia Environment SA / Waste Management Inc. / Suez SA / Republic Services Inc. / Waste Connections Inc. / Clean Harbors Inc. / Covanta Holding Corporation / Biffa Group / Remondis SE & Co. KG / Stericycle Inc. / GFL Environmental Inc. / FCC Environment / Cleanaway Waste Management Ltd / Hitachi Zosen Inova AG / Sims Limited / Renewi PLC / Averda / Daiseki Co. Ltd / Tatweer Environmental Services / Waste Pro USA / Recology /

## Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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#### 6.3.2 Waste Management Inc.

#### 6.3.3 Suez SA

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