

# Metal Recovery Separators

ANMD-MRS6-055 · Recycling & Resource Recovery

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Metal recovery separators extract ferrous and non-ferrous metals from waste and scrap streams, turning mixed material into high-value recovered metal. This decision-grade study sizes the global market three ways — value, units and throughput — across separator type, technology and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond throughput, metal recovery separators deliver measurable high metal recovery, clean separated fractions and commodity value, while metal recovery and reuse strengthen the circular-economy story.

Mapped Sustainable Development Goals:

<b>SDG 9</b> Industry & Innovation	<b>SDG 12</b> Responsible Consumption	<b>SDG 13</b> Climate Action
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Measurable sustainability outcomes assessed:

- High ferrous and non-ferrous metal recovery
- Clean separated metal fractions
- Recovered commodity value
- Process energy, residual streams, offtake quality and worker safety as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>3</b> SDGs Mapped

## REPORT COVERAGE

**Geographic scope:** North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Europe is the policy leader (Germany, France, United Kingdom) on recycling targets and EPR; North America is the value leader (United States, Canada) on recycling-capacity build-out; Asia Pacific is the scale engine; other regions assessed on their own merits.

## MARKET OVERVIEW

**From early adoption to mainstream scale — where metal recovery goes sensor-based, X-ray-enabled and high-purity.**

The metal recovery separators market is moving from early adoption to mainstream commercial scale. Demand is driven by circular-economy and recycling pressure converging with regulation and material-security needs, supported by strong momentum across Europe, North America and Asia Pacific. The market is read three ways — value, units and throughput — and forecast under four scenarios, each region reported separately.

- **Europe is the technology leader** — Germany, France and United Kingdom, on separation-equipment industry
- **North America is the value leader** — United States and Canada, on scrap-metal recovery
- **Asia Pacific is the scale engine** — China, Japan and India, on metal-recycling volume
- **Recovery and purity are the differentiators** — eddy-current and X-ray sorting plus clean fractions

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Policy leader	Germany, France, United Kingdom — recycling targets, EPR
North America	Value leader	United States, Canada — recycling-capacity build-out
Asia Pacific	Scale engine	China, Japan, India — waste-infrastructure, volume
Middle East	High-growth	Saudi Arabia, UAE — circular-economy investment
Latin America	Emerging	Brazil, Mexico — waste-management expansion
Africa	Emerging	South Africa, Nigeria — recycling, resource recovery

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Material-security + commodity-recovery convergence</li> <li>• Metal-recovery-rate &amp; purity value</li> <li>• Policy support (recycling targets, critical-raw-materials)</li> <li>• Commodity-price upside &amp; offtake economics</li> <li>• Eddy-current, induction &amp; X-ray technology gains</li> </ul>	<ul style="list-style-type: none"> <li>• Capital cost &amp; financing intensity</li> <li>• Wear-part, energy &amp; service-cost inflation</li> <li>• Feedstock-variability &amp; contamination risk</li> <li>• Commodity-price volatility &amp; market exposure</li> <li>• Permitting, siting &amp; operational-readiness gaps</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Separator Type</b>	Eddy-current · magnetic (overband/drum) · induction sorting · X-ray (XRT/XRF) · sensor-based
<b>By Technology</b>	Magnetic · eddy-current · sensor / X-ray
<b>By Application</b>	Scrap metal recycling · MRF & waste recovery · mining & WEEE
<b>By End User</b>	Recyclers & MRF operators · waste processors · municipalities · OEMs · circular-economy ventures
<b>By Business Model</b>	Capital purchase · turnkey EPC · processing-as-a-service · lease / BOO
<b>By Scale</b>	Single-line · facility · multi-site

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

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- › Chapter 2. Industry Discovery Summary — Metal Recovery Separators
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

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## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
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- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
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- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global recycling-equipment majors, specialist metal recovery separators makers, and emerging innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, bankable recycling infrastructure.

### Representative players profiled in the full report:

Steinert GmbH · Tomra Systems ASA · Eriez Manufacturing Co. · Bunting Magnetics Co. · SGM Magnetics S.p.A. · and 20+ further profiled players across equipment OEMs, technology licensors and emerging innovators.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global metal recovery separators market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do recovery rates and offtake quality change project economics versus legacy processing?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, circular-economy and resource-security and disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and throughput views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, recycling and waste-management operators, equipment OEMs and EPC contractors, municipalities and waste authorities, brand owners and producer-responsibility organisations, regulators and lenders, and corporate strategy and ESG teams.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.