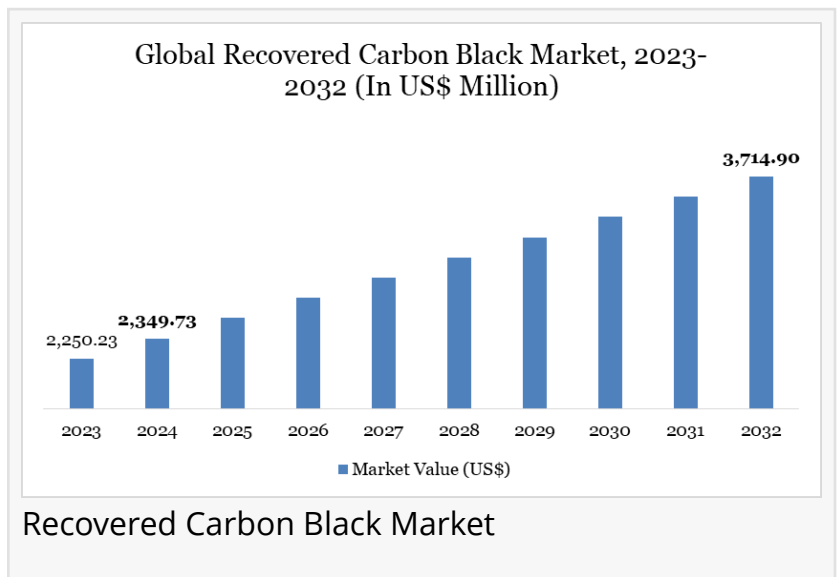


Recovered Carbon Black Market Outlook 2025-2032: Global Size, Share, Growth Opportunities, and Industry Trends

TX, UNITED STATES, August 13, 2025 /EINPresswire.com/ -- The global [recovered carbon black market](#) was valued at US\$ 2,033.22 million in 2024 and is projected to reach approximately US\$ 3,270 million by 2032, growing at a CAGR of around 6.1% during 2025–2032. This growth reflects the market's increasing importance as industries intensify their focus on sustainability, circular economy practices, and cost optimization.



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The material's adoption is being driven by the growing commitment of leading manufacturers to incorporate recycled content into their products. For example, Michelin has set an ambitious goal to use 40% recycled and sustainable materials in all new tires by 2030, progressing towards a 100% target by 2050. While integrating rCB into commercial production has traditionally been a lengthy and technically challenging process, these environmental commitments are accelerating development timelines.

The market is also benefiting from stringent government regulations on waste tire disposal, rising demand from automotive and industrial sectors, and heightened environmental awareness. A key milestone in industry standardization came with the establishment of ASTM Committee D36 on Recovered Carbon Black in 2017, chaired by Pieter Ter Haar. This committee plays a pivotal role in setting voluntary consensus standards for rCB produced via pyrolysis, ensuring uniform quality, safety, and performance benchmarks.

Rising End-of-Life Tire Volumes and Quality Challenges Shaping the Recovered Carbon Black Market

The growing volume of End-of-Life Tires (ELTs) is a key driver of the recovered carbon black (rCB) market, presenting both an environmental challenge and an industrial opportunity. Globally, the tire industry manufactures around 2.5 billion tires annually, with approximately 1.6 billion reaching end-of-life each year, creating a substantial waste burden.

In the United States alone, an estimated 285–290 million scrap tires are generated annually. Many of these end up in landfills or are stockpiled improperly, posing significant environmental and public health hazards such as fire risks and groundwater contamination. To address this, several U.S. states have implemented landfill bans and recycling incentives, spurring adoption of pyrolysis-based recovery systems.

In Europe, the EU End-of-Life Vehicles Directive mandates that 95% of vehicle materials, including tires, must be reused or recovered. This has accelerated the growth of advanced rCB producers such as Scandinavian Enviro Systems and Black Bear Carbon B.V. In China, the world's largest tire market, mounting environmental pressures have prompted government-backed initiatives supporting green recycling technologies, further boosting domestic rCB production capacity.

The abundance of ELTs, combined with stringent regulatory mandates and corporate sustainability targets, is fueling global rCB demand. This ensures a steady feedstock supply for producers, while contributing to waste management solutions and global decarbonization goals.

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Inconsistent Quality Challenges, Tire Industry Adoption, and Asia-Pacific Leadership in the Recovered Carbon Black Market

One of the most significant restraints in the recovered carbon black (rCB) market is the inconsistent quality and performance of the material compared to virgin carbon black. This variability creates challenges in product formulation, repeatability, and quality control, particularly in industries with stringent performance requirements. For instance, global tire manufacturers such as Goodyear and Bridgestone have been cautious in scaling rCB adoption due to concerns over batch-to-batch variability, which can directly impact tire durability and safety.

The absence of standardized post-treatment and purification processes including de-ashing and surface activation further restricts the use of rCB in high-performance applications, leading to hesitancy from end-users despite its clear environmental and cost benefits. Overcoming this performance gap through advanced processing technology, standardization, and industry collaboration is essential for unlocking rCB's full commercial potential.

Tire Industry Drives Recovered Carbon Black (rCB) Adoption Amid Sustainability Push

The tire industry remains the largest and most consistent end-use segment for both virgin and recovered carbon black. Carbon black typically accounts for 20–30% of a tire's weight, serving as a vital reinforcing filler that enhances durability, UV resistance, and overall performance. With growing pressure to reduce environmental impact and embrace circular materials, rCB is emerging as a viable alternative to virgin carbon black.

Leading tire manufacturers are taking concrete steps toward integration, Michelin, in partnership with Scandinavian Enviro Systems, is working to scale rCB use in pursuit of its target of 40% sustainable materials by 2030 and 100% by 2050. Likewise, Continental AG has partnered with Bolder Industries to incorporate rCB into select tire lines, signaling confidence in its performance and commercial viability.

The market's momentum is further reinforced by government-backed initiatives. Regions such as Europe, India, and North America have enacted policies that promote end-of-life tire (ELT) recycling and discourage landfilling, indirectly boosting rCB supply for tire manufacturing. The automotive industry's shift toward electric vehicles (EVs) and green mobility is also driving demand for sustainable materials in tire production, positioning rCB as an increasingly relevant solution.

Asia-Pacific Leads rCB Market Growth with Strong Production, Regulations, and Feedstock Availability

Geographically, the Asia-Pacific region dominates the rCB market, propelled by its massive tire production capacity, rapid automotive sector growth, and increasing emphasis on sustainable manufacturing. Countries such as China, India, Japan, and South Korea rank among the world's largest tire producers and consumers, generating a substantial volume of ELTs that provide a stable raw material source for rCB production. According to the National Bureau of Statistics, China produced 105.56 million rubber tires in December 2024, a 9.5% year-on-year increase. For the full year, output reached 1.186 billion units, up 9.2% compared to 2023, reflecting expanded production capacity and improved manufacturing efficiency.

Governments across the region are actively supporting rCB adoption through circular economy policies and waste tire recycling regulations. In India, the Central Pollution Control Board (CPCB) implemented Extended Producer Responsibility (EPR) rules in 2022, mandating proper tire recycling and encouraging rCB usage.

Japan also maintains a highly organized tire collection and recycling framework, directing ELTs toward energy recovery and material reuse, including rCB production. With its vast manufacturing base, strong regulatory push, and abundant feedstock availability, Asia-Pacific is set to remain the global hub for rCB production and consumption in the years ahead.

Major Players Shaping the Global Recovered Carbon Black Market

The recovered carbon black market is driven by the presence of several key players, including Scandinavian Enviro Systems AB, Black Bear Carbon B.V., Klean Industries, Finster Black Pvt Ltd, ECO Infinic Co., Ltd, Birla Carbon, Pyrum Innovations, Green Distillation Technologies, Neuman & Esser Group (NEA). These companies are at the forefront of advancing sustainable solutions, driving innovation, and meeting the growing global demand for high-quality recovered carbon black.

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Conclusion

The recovered carbon black market is on a clear growth trajectory, driven by sustainability mandates, regulatory enforcement, and the tire industry's gradual but steady adoption. However, bridging the quality and performance gap between recovered and virgin carbon black remains crucial for broader commercialization. As technology advances, standardization efforts mature, and industry collaborations deepen, rCB is poised to transition from a niche sustainable material to a mainstream industrial feedstock, especially in the automotive and tire manufacturing sectors, where demand is both high and enduring.

Why Choose This Global Recovered Carbon Black (rCB) Market Report?

- Latest Data & Forecasts: Comprehensive, up-to-date market insights and projections through 2032.
- Regulatory Intelligence: Actionable analysis of key policies and standards (ASTM Committee D36, EU End-of-Life Vehicles Directive, EPR mandates in India, circular economy initiatives).
- Competitive Benchmarking: Assess strategies of leading players such as Michelin, Continental AG, Scandinavian Enviro Systems, Black Bear Carbon B.V., and Bolder Industries.
- Emerging Market Coverage: Special focus on high-growth regions including Asia-Pacific (China, India, Japan, South Korea) and other developing markets.
- Actionable Strategies: Identify growth opportunities, address quality challenges, and optimize supply chain for maximum ROI.
- Pricing Analysis: Detailed assessment of historical and current rCB pricing trends by grade, application, and region, along with cost drivers and margin analysis to support strategic procurement and pricing decisions.
- Expert Analysis: Insights from industry specialists with proven expertise in sustainable materials, tire recycling, and circular economy trends.

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