Global E-Scrap Refining: Capacity Expansion, Recovery Economics and the 2027 Outlook — Q3 2026

Published: 15 November 2026 | Author: David Daoud

Smelters and refiners are adding electronic-scrap recovery capacity while concentrate smelting earns record-low treatment charges: the 2026 benchmark is zero, and spot charges reached −$297 a ton at September 30. The inaugural CS Metals Recovery Intelligence assessment reviews the latest disclosures of 11 producers (Aurubis, Boliden, DOWA, Freeport-McMoRan, Glencore, JX Advanced Metals, Korea Zinc, Materion, Mitsubishi Materials, Sumitomo Metal Mining and Umicore) and finds capacity expanding mostly on paper, flat measured intake and no evidence of better terms for sellers.

The report covers how the electronic-scrap refining chain works, competitive positioning, capacity and investment, recovery economics, four regional markets, company intelligence with 39 hardware circularity findings, and the 2027 outlook with scenarios and quarterly indicators. Companies, facilities and indicators can also be explored in the CS Metals Recovery Intelligence dashboard.

COMPLIANCE STANDARDS · PULSE

Continue reading with Pulse

This analysis is available to CS Clients and Pulse subscribers.

Already a subscriber? Log in

Subscribe to Compliance Standards' Sector Pulse Research

Contact us at 754.229.0095 or inquiries@Compliance-Standards.com

Our Offices: Boston, MA | 2361 Walnut Court, Pembroke Pines, FL 33026