The Market for Biowaste AD Plants in Europe

Plant Technology – Project Planning – Market - Trends

Cologne, November 2014
Fermenting biowaste is a current focus of many disposal companies and energy producers in Europe. The implementation of the EU waste legislations and the increasing support for using residual materials to produce biogas both favour and determine the construction of biowaste AD plants.

This is why the installed capacities in biogas plants fermenting municipal and industrial biowaste will increase from 900 MW_{el} in 2014 to around 1,750 MW_{el} in 2023 – meaning the capacities will almost double in the next ten years. We furthermore expect the number of plants in Europe to grow from 800 to over 1,450.

ecoprog has analysed the market for biowaste AD plants in Europe in detail and we are happy to offer you a detailed study on this topic. In our work, we have also involved energy agencies, public authorities and waste associations as well as operators and plant manufacturers.

The up-to-date analysis of figures, facts, estimations and trends in the European market for the construction and operation of biowaste AD plants is of interest for operators, disposal companies, suppliers, associations, research institutes and consultants.

The study “The Market for Biowaste AD Plants in Europe” includes:

- The analysis and description of the most important operators and manufacturers of biowaste AD plants with a comparison of the different plant technologies.
- An evaluation of the costs and revenues structures of a biowaste AD plant, based on exemplary plants.
- A presentation of an exemplary project planning for a biowaste AD plant, from the idea for the plant to its commissioning.
- A detailed analysis of all important political, economic, managerial and technical trends for constructing and operating biowaste AD plants.
- A concrete assessment of the current and future market volumes for biowaste AD plants by country, up to and including 2023, based on a transparent and understandable methodology.
- The description of more than 700 active biowaste AD plants, including technical data and contact addresses. These plants represent around 90 per cent of the European capacities.
- A project list with over 150 new construction projects, 40 of which are actually under construction and more than 110 of which are being planned or discussed.

The study is available in **English and German from 2,900,- € plus VAT.**

Contact:

**Marcel Siebertz**
ecoprog GmbH
Tel. +49 221 788 03 88 - 14
Fax +49 221 788 03 88 - 10
m.siebertz@ecoprog.com
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5 Project planning for a biowaste AD plant

(…)

Generally, three phases can be distinguished from having the idea for until commissioning a biowaste AD plant: design and planning, approvals as well as construction and commissioning. The approval phase needs the most time; however, some applications can be handed in during the other phases as well.

Figure 26: Rough time and cost planning for a biowaste AD plant

(...)

5.1 Idea for the project

Different factors can work as incentives for wanting to construct a biowaste AD plant:

- Legal specifications say that biowaste has to be collected separately and treated.
- Industrial enterprises want to avoid alternative disposal costs.
- Money can be made by producing biogas or rather more money can be made than by using alternative treatment methods such as a composting plant.
- A biowaste AD plant receives public (co-)funding as it serves as a “green” showcase project for a city or a municipality.
- (…)

The Market for Biowaste AD Plants in Europe
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8.1 Belgium

<table>
<thead>
<tr>
<th>Number of biowaste AD plants</th>
<th>44</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity [thousand t/a]*</td>
<td>2,793</td>
</tr>
<tr>
<td>Population [million inhabitants]</td>
<td>10.7</td>
</tr>
<tr>
<td>Deadlines of Landfill Directive</td>
<td>2006/09/16</td>
</tr>
<tr>
<td>Electrical Capacity [MW_el]*</td>
<td>101</td>
</tr>
<tr>
<td>Reduction of BDW landfilling by 3rd deadline**</td>
<td>0%</td>
</tr>
<tr>
<td>Forecast capacity 2023 [MW_el]*</td>
<td>150</td>
</tr>
<tr>
<td>Max. compensation for biogas from biowaste [€ct/kW_el]</td>
<td>18</td>
</tr>
</tbody>
</table>

*Partly estimations by ecoprog, based on collected data and market factors
**BDW = biodegradable waste

Management summary

Belgium’s waste treatment system is very sophisticated and will probably fulfil all criteria of both the EU Landfill and the EU Waste Framework Directive. Despite these achievements, the government still aims at further developing the energetic recovery of biowaste in biogas plants, for which an above-average subsidisation is granted through a certificate system. The number of plants and the installed capacity will increase by almost 50 per cent by 2023.

Waste: background / market factors / legal framework

Belgium already fulfils all specifications of the EU Landfill Directive. Large amounts of biowaste determined for landfilling can therefore not be expected to be available for biogas plants.

Figure 28: Amounts and treatment of municipal solid waste in Belgium

Development from 2003 until 2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Landfilling</th>
<th>Thermal utilisation, Incineration</th>
<th>Material utilisation</th>
<th>Composting, Anaerobic digestion (Biogas)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>0.3 Mio t</td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2004</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2005</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2009</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2011</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>2012</td>
<td></td>
<td>1%</td>
<td>36%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: Eurostat, Data for 2012

Belgium also fulfils most specifications of the EU Waste Framework Directive. When compared to other countries, material recovery of secondary raw material such as paper, glass, plastics and metal has been high in Belgium for many years. It increased once again considerably between 2002 and 2011, from 30 to 35 per cent. In the past two to three years as well, (...)

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Energy: background / market factors / legal framework

Around 50 per cent of Bulgaria’s electricity generation is produced by using domestic brown coal. The country’s only nuclear power plant in Kosloduj generates around a third of Bulgaria’s overall electricity production. Renewable energies only play a minor role. Hydropower is the only source that contributes a noteworthy electricity generation share so far. Wind power is currently being developed.

Figure 311: Electricity generation by energy source in Bulgaria

Bulgaria already introduced a law supporting renewable energies in 2007, which provides for a feed-in tariff. It amounts to 80 per cent of the average electricity market price of the previous year plus a bonus that is determined by the regulatory authority and does not depend on the applied technology. The Bulgarian regulatory authority recalculates this bonus, and thus the feed-in tariff, every year. The currently valid amount of the feed-in tariff for the different technologies was published in mid-2011. The new tariffs are significantly higher than in the past and almost doubled for some size classes and feedstocks respectively.

Figure 32: Biogas feed-in tariff in Bulgaria 2013/2014

<table>
<thead>
<tr>
<th>Plant size (kW)</th>
<th>Compensation of household waste (€ct/kWh)</th>
<th>Compensation for plant and animal material (€ct/kWh)</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to 150 kW</td>
<td>13.49</td>
<td>11.52</td>
</tr>
<tr>
<td>150 – 500 kW</td>
<td>12.94</td>
<td>10.94</td>
</tr>
<tr>
<td>501 – 1,500 kW</td>
<td>12.47</td>
<td>10.55</td>
</tr>
<tr>
<td>501 – 1,500 kW + CHP</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1,501 – 5,000 kW</td>
<td>12.47</td>
<td>10.55</td>
</tr>
</tbody>
</table>

Source: German-Bulgarian Chamber of Industry and Commerce

(…)
Plants

Today, there are around 90 biogas plants that mostly ferment biowaste in the UK. They have an overall installed capacity of circa 130 MW_{el}.

About a third of these 90 plants use biowaste from separate MSW collections. The others mainly process feedstocks from the food and beverages industry. (…)

Market development

Prospects on the market for biowaste AD plants in the UK are very favourable. We expect another 100 plants with an installed capacity of 130 MW_{el} to be commissioned by 2023.

Figure 112: Market development biowaste AD plants in the United Kingdom

By 2017, an average of 20 MW will go online annually. The extent of new constructions will then decline slightly in the course of the introduction of the premium model. We expect the extent of new constructions to decline further after 2020. The reasons for this are twofold: (…)

Figure 113: Project outlook UK

<table>
<thead>
<tr>
<th>Plant</th>
<th>Capacity [kW_{el}]</th>
<th>Capacity [t/a]</th>
<th>Status</th>
<th>Start</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bromley</td>
<td>2,000</td>
<td>46,000</td>
<td>under construction</td>
<td>2015</td>
</tr>
<tr>
<td>Meriden</td>
<td>n/a</td>
<td>50,000</td>
<td>approved</td>
<td>2015</td>
</tr>
<tr>
<td>Surrey</td>
<td>1,778</td>
<td>40,000</td>
<td>planned</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(...)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(...)</td>
</tr>
</tbody>
</table>
Biowaste AD Plants in Germany

(...) 

**Bad Wünnenberg**
Status: active
Electric Installed capacity (kWel): 2,548
Feedstock: biowaste
Input capacity (t/a): 20,000

**Operator**
HT Bioenergie GmbH & Co. KG
Tewesweg 3a
33181 Bad Wünnenberg
Tel: +49 2953 962362

Remarks: In March 2014 the city council approved the planned expansion.

**Baden-Baden**
Status: active
Start of operation: 1993
Feedstock: biowaste, sewage sludge
Feedstock capacity (t/a): 85,000
Manufacturer: BTA International GmbH

**Operator**
Stadt Baden-Baden
Briegelackerstr. 8
76534 Baden-Baden

**Bardowick**
Status: active
Start of operation: 2007
Electric Installed capacity (kWel): 2,100
Biomethane production per hour [Nm³/h]: 350
Feedstock: organic waste
Input capacity (t/a): 36,500

**Operator**
Mabagas Bardowick GmbH & Co. KG
Adendorfer Weg
21357 Bardowick
Tel: +49 4131 6041172
Fax: +49 4131 6041170
info@mabagas-bardowick.de
www.mabagas.com

Remarks: In June 2012, Mabagas took over the existing biogas waste plant of BioEn Nord GmbH & Co. KG in Bardowick. Since 2013 the biogas is converted into biomethane.

**Barth**
Status: active
Start of operation: 1998
Electric Installed capacity (kWel): 866
Feedstock: slurry, organic waste
Input capacity (t/a): 73,000

**Operator**
Biogas Barth GmbH
Planitz 6
18356 Barth
Tel: +49 38231 81445

Remarks: Biowaste 12,783 t/a; food waste 2,293 t/a; waste from foodstuff production 179 t/a; animal by-products 3,193 t/a; slurry 45,995 t/a; other organic food 1,904 t/a (numbers from 2009).

**Bassum**
Status: active
Start of operation: 2009
Electric Installed capacity (kWel): 625
Feedstock: biowaste
Input capacity (t/a): 18,000
Manufacturer: BEKON Energy Technologies GmbH & Co. KG

**Operator**
AWG Abfallwirtschaftsgesellschaft mbH Bassum
Klövenhausen 20
27211 Bassum
Tel: +49 4241 801 0
Fax: +49 4241 801 100
info@awg-bassum.de
www.awg-bassum.de

Remarks: The plant is connected to a composting plant with a capacity of 50,000 t/a. The heat is used for the Bassum hospital via a 3.2 km district heating pipe.

**Bebra**
Status: active
Start of operation: 2008
Electric Installed capacity (kWel): 1,000
Feedstock: catering waste, leftovers, food waste
Input capacity (t/a): 18,250
Manufacturer: Schwarting Biosystem GmbH

**Operator**
Raiffeisen-Warenzentrale Kurfessen-Thüringen GmbH
Robert-Bunsen-Straße 23
36179 Bebra
Tel: +49 66 2292 0652
Fax: +49 66 2292 0671
thorsten.ernst@raiffeisen-kassel.de
geno.raiffeisen.com/rwz-agrar-bebra

**Berlin**
Status: active
Start of operation: 2013
Electric Installed capacity (kWel): 5,500
Biomethane production per hour [Nm³/h]: 1,000

(...)
Biowaste AD Plants in Italy

(...)

**Lana**
Status: active
Electric Installed capacity (kWel): 870
Feedstock: organic fraction from MSW
Feedstock capacity (t/a): 15,000

**Legnago**
Status: active
Start of operation: 2007
Electric Installed capacity (kWel): 2,000
Feedstock: biowaste

**Operator**
Fertitalia
Via Frattini 48
37045 Legnago
Tel: +39 442 78389
Fax: +39 442 628882
info@fertitalia.it
www.fertitalia.com

**Lozzo Atestino I**
Status: active
Start of operation: 2010
Electric Installed capacity (kWel): 1,500
Feedstock: household waste
Input capacity (t/a): 76,000

**Lozzo Atestino II**
Status: under construction
Start of operation: 2014
Electric Installed capacity (kWel): 999
Feedstock: biowaste
Input capacity (t/a): 43,800

**Montello I**
Status: active
Start of operation: 1997
Electric Installed capacity (kWel): 7917
Feedstock: biowaste, household waste
Input capacity (t/a): 180,000

**Operator**
Montello SPA
Via Fabio Filzi 5
24060 Montello
Tel: +39 035 689111
info@montello-spa.it
joomla.montello-spa.it

**Montello II**
Status: active
Start of operation: 2010
Electric Installed capacity (kWel): 999
Feedstock: household waste

**Manufacturer**: BTS Italia srl

**Neapel**
Status: active
Start of operation: 2011
Electric Installed capacity (kWel): 1,000
Feedstock: biowaste
Input capacity (t/a): 30,000
Manufacturer: BEKON Energy Technologies GmbH & Co. KG

**Operator**
C.E.A. CONSORZIO ENERGIE ALTERNATIVE
S.c.ar.l.Via SP498 KM 17,700 - località Sanganiello
80026 Caivano
Tel: +39 081 195 18778
Fax: +39 081 195 00013
info@cea.na.it
cea.na.it

**Novi Ligure**
Status: active
Start of operation: 2012
Feedstock: organic waste
Input capacity (t/a): 16,700
Manufacturer: Axpo Kompogas AG

**Ospedaletto Lodigiano**
Status: active
Start of operation: 2011
Electric Installed capacity (kWel): 1,095
Feedstock: slaughterhouse waste

**Operator**
Inalca S.P.A.
Via Spilamberto, 30/C
41014 Castelvetro - Modena
Tel: +39 059 755111
Fax: +39 059 755517/9
info@inalca.it
http://www.inalca.it

**Pinerolo**
Status: active
Start of operation: 2011
Electric Installed capacity (kWel): 3,050
Feedstock: organic fraction from MSW
Input capacity (t/a): 50,000

(...)

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## Register of plants

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<th>Plant</th>
<th>Code</th>
<th>Plant</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aarberg</td>
<td>306</td>
<td>Bad Kleinkirchheim I</td>
<td>267</td>
</tr>
<tr>
<td>Aarhus</td>
<td>130</td>
<td>Bad Königshofen III</td>
<td>138</td>
</tr>
<tr>
<td>Abrunheira</td>
<td>284</td>
<td>Bad Kösritz</td>
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