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The Market for Municipal Waste Management in Poland

Locations, plants, backgrounds and market assessment

Cologne, April 2019

ecoprog GmbH

The Market for Municipal Waste Management in Poland

The Polish waste market is on the move. The increase of the marshal fee, which came into effect in early 2018, has caused a distortion on the Polish disposal market. Until 2020, the fee will amount to 270 PLN per ton (ca. 63 EUR per ton) both for mixed MSW and sorting residues. This price hike mainly puts pressure on the about 170 Polish pretreatment plants for MSW. For some of them, the increased landfill tax on sorting residues will quadruple their costs within 3 years. Today, these plants treat about 90% of the mixed MSW. In early 2019 already, disposal fees for pretreated MSW reached or even exceeded 100 EUR per ton at many locations.

The Polish municipalities are currently planning to considerably expand the material recovery as well as the biological and thermal treatment of waste. In this way, Poland wants to implement the goals of the EU waste legislation and develop alternatives to landfilling. According to the plans of the Polish Voivodeships, more than 13.8 billion PLN (3.2 billion EUR) should be invested in waste infrastructure projects in the years to come.

In light of this development, ecoprog GmbH has evaluated the Polish MSW disposal market in detail. This up-to-date analysis of figures, facts, estimations and trends in the Polish disposal segment, which is based on our market knowledge and detailed inquiries, is of interest for disposal companies, manufacturers, suppliers, operators, associations, research institutes and consulters.

The study “The Market for Municipal Waste Management in Poland” includes:

- A detailed analysis of the structure, legal framework, level of development and investment needs of the Polish waste management system.
- Particularised information on over 2,100 plants and treatment units for MSW disposal. This includes MBT plants, WtE plants, organic treatment plants, sorting plants for separately collected MSW, recycling plants and RDF production plants. The data also comprises information on locations, operators, capacities and throughput.
- Information on more than 270 planned treatment units and over 360 envisaged modernisation projects at existing waste infrastructure plants. This data also comprises information on planned capacities, locations, operators and the estimated investment sums.
- A detailed analysis of this data at voivodeship level, e.g. in the form of more than 80 tables describing the planned investments by segment and 80 regional maps depicting plant locations.

The study is available in English and German language, starting from 3,400.- EUR plus VAT.
Please see the end of this extract to find detailed price and contact information.

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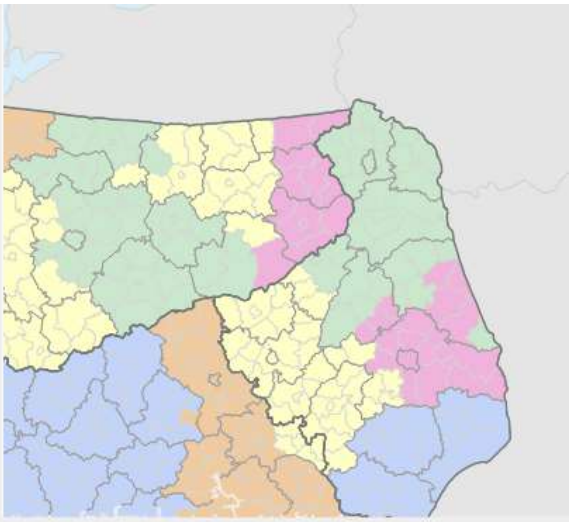
disposal areas. The main reason for determining disposal areas is that the individual municipalities do neither have enough inhabitants nor funds to operate infrastructure themselves.

A disposal area is a region of several neighbouring municipalities, which have a total population of at least 150,000. An individual municipality may also be its own disposal area, but only if it has more than 500,000 inhabitants. However, the latter only applies to 5 municipalities in Poland. A disposal area may furthermore include municipalities from different Voivodeships, if their respective waste plans allow for this.

Figure 11: Disposal areas in Poland



More details are shown in the report

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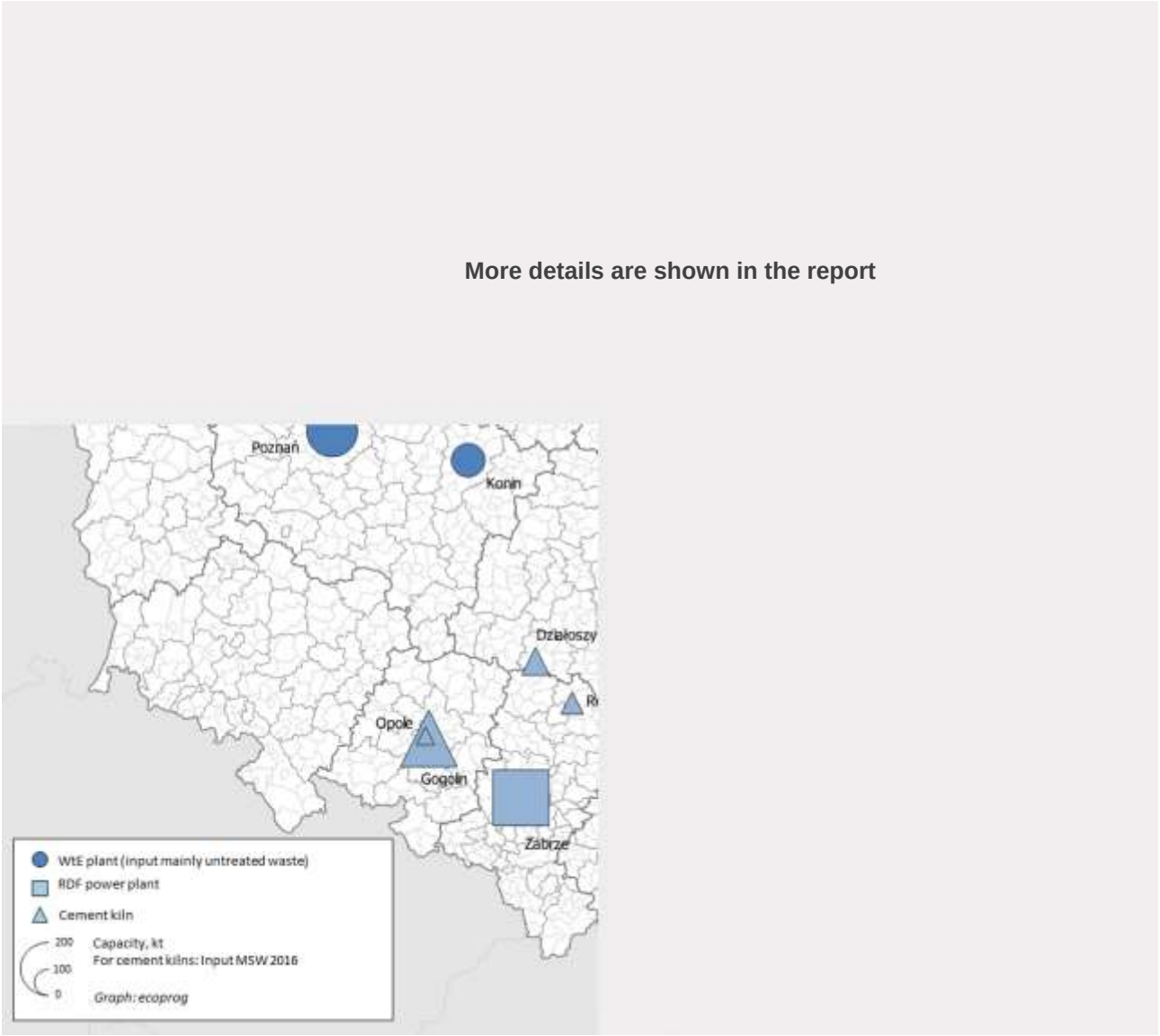
About 430 kt of this was MSW. However, some waste incineration plants only went operational in or after 2016; therefore, the statistical data from 2016 only reflects a part of the actual input.

Figure 27: Operational thermal treatment plants



When compared to other countries, thermal waste treatment has a weak position. There are several reasons for this. One main cause were the costs and fees in the Polish waste management system. Until 2017, the MBT plants usually charged between 230 and 280 PLN/t (ca. 60 EUR/t) for MSW disposal. Against this backdrop, the development of traditional waste incineration plant

(…)

7.1 Dolnośląskie

General data (2016)		New plants planned by 2022	
Inhabitants [million]	2.9	Thermal recovery	6
Share of Polish GDP	8.4%	Sorting	15
Disposal areas	6	Recycling	9
MSW (mixed collection) [1,000 t]	826	Composting	2
MSW (separate collection) [1,000 t]	223	MBT plant retrofits	17
Separate collection share	21%	**Investment volume [PLN million]**	3,300

Structure

Dolnośląskie Voivodeship is located in the southwest of Poland, bordering Germany as well as the Czech Republic. With a population of almost 3 million, the Voivodeship is the fifth largest of the country.

Dolnośląskie has almost 120 municipalities. The 4 largest of them – Wrocław, Wałbrzych, Legnica and Jelenia Góra – are all urban municipalities not belonging to a county. The remaining municipalities are organised in 26 counties.

Wrocław, the Voivodeship's capital, has more than 600,000 inhabitants and is the by far largest city in Dolnośląskie. The second largest city, Wałbrzych, has about 115,000 inhabitants and the fourth largest city, Jelenia Góra, has 80,000.

A gross value added of PLN 53,613 (EUR 12,505) per head makes Dolnośląskie the second strongest economic region in Poland. This is also due to the Voivodeship's location at two international borders, resulting in high foreign investments. The industrial sector contributes 32% to the added value, which is more than the national average. The most important sectors are the automotive, electrical, plastics and chemical industries. The services sector is also growing dynamically, especially in the metropolitan area of Wrocław.

Within the past 10 years, the population increased by 0.7%, which is slightly less than the national average.

Disposal areas

Dolnośląskie Voivodeship is subdivided into 6 disposal areas.

The largest by far disposal area, the Centre North, includes the capital Wrocław and covers about 1 million inhabitants.

However, some of the disposal areas overlap with other Voivodeships: 12 of Dolnośląskie's municipalities belong to disposal areas that are mainly located in Wielkopolskie or Opolskie. Also, Dolnośląskie's disposal area East includes 3 municipalities of neighbouring Voivodeship Opolskie.

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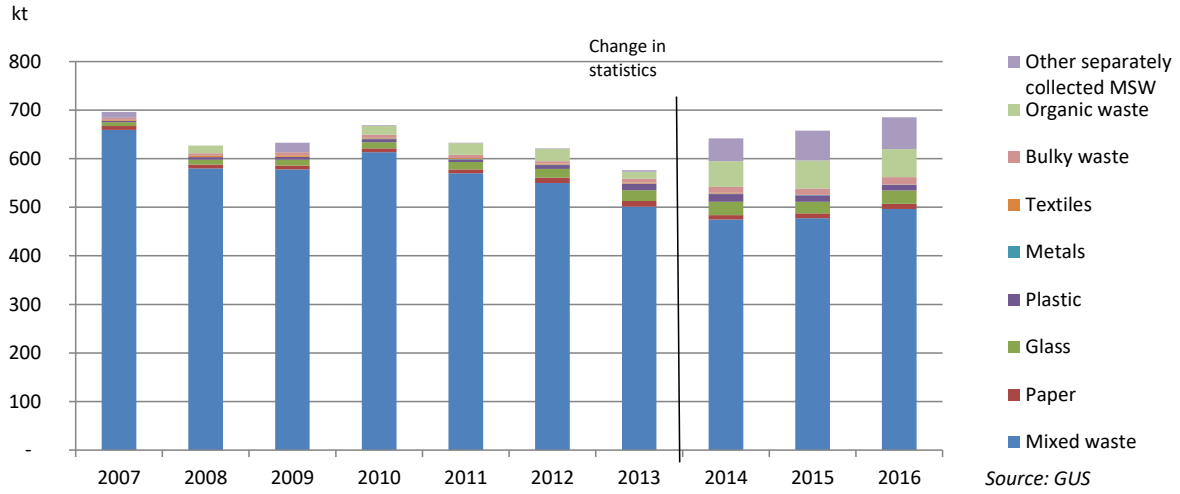
Waste amounts and waste treatment

With 685 kt of MSW produced in 2016, Łódzkie ranks seventh in Poland. 189 kt of this amount was collected separately. This represents a separate collection share of 28%, which is the second highest in the country (with Śląskie ranking first).

Ever since the method of data collection was amended in 2014, Łódzkie has been showing a moderate quantitative growth of 2 to 4% (contrary to some of the other Voivodeships). In terms of separately collected waste, the largest fraction is other separately collected waste (65 kt), followed by organic waste (38 kt), glass (27 kt) as well as paper and plastics (11 kt each).

Figure 66: Waste amounts by type of collection, Łódzkie



According to the statistics, 24% of the MSW underwent material recovery in 2016, whereas 22% went to organic treatment. This equals a recycling share of 46%. However, this share has to be considered as a theoretical one, as it is the result of the way the MBT plant input is classified in Poland (and this is the case in all the Voivodeships).

The situation is similar when it comes to the 10% share of thermal recovery. According to the annual report of the Marshall's Office in Łódzkie Voivodeship, there is only one cement plant (by company WARTA S.A. in Działoszyn), which co-incinerated waste from sorted waste in 2016, namely about 34 kt (of EWC code 191204). In principle, these may be residues from the sorting of MSW in MBT plants. Apart from this plant, the heating power plant in Zgierz, run by PGE, one of the largest energy suppliers in Poland, is also allowed to co-incinerate RDF. De facto, however, no RDF was incinerated in 2015 and 2016, according to the report of the Marshall's Office.

(…)

(…)

MBT plants/sorting plants for mixed MSW

According to the Voivodeship's waste management plan, mixed MSW is treated in 8 RIPOK status MBT plants. Each disposal area has 1 MBT plant. The mechanical treatment capacity amounts to almost 400 kt, whereas the biological treatment capacity reaches 146 kt. The largest facilities are located in Lublin, Włodawa and Zamość.

Further MBT plants without RIPOK status are for instance located in Biłgoraj, Lubartów and Łęczna; they have capacities of about 20 kt each. According to the waste plan, these facilities

(…)

Figure 81: Investments in MBT plants 2016-2022, Lubelskie

ID	Municipality	Expansion / New	Operator	Investment(PLN)
LE-MM-1	Bełżyce	Expansion	ZZOK w Bełżycach sp. z o.o	2.250.000
LE-MM-5	Biała Podlaska	Expansion	„WOD-KAN" Sp. z o.o	9.111.900
(…)	*More data will be provided in the report*			

Sorting plants for separately collected waste

According to the plant data of the Marshall's Office's waste report, 23 sorting lines with a capacity of 330 kt were operational in 2016. Many of these plants are installed at the MBT plant sites, e.g. in Mircze, Lublin and Biłgoraj.

The Voivodeship's waste plan envisages a new plant to be constructed in Radzyń between 2016 and 2022, entailing in investment of PLN 15 million. According to the plant data, however, there is already a plant at this site. Even though the stated capacity does not match the information in the planning documents, it cannot be excluded that facility is the planned plant.

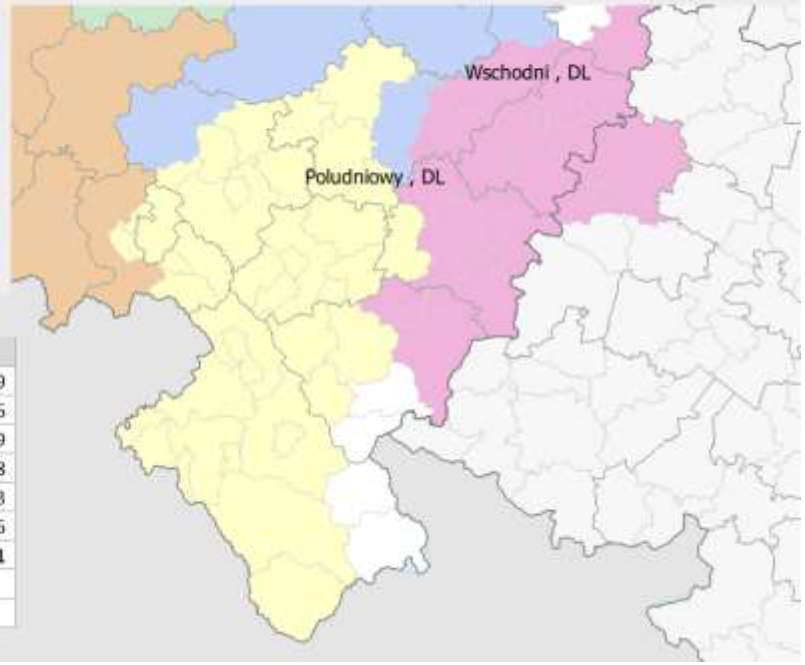
Additionally, there are plans for 8 expansion and modernisation projects, but, again, it cannot be excluded that some of those have already been implemented.

Figure 82: Investments in sorting plants 2016-2022, Lubelskie

ID	Municipality	Expansion / New	Operator	Investment(PLN)
LE-SS-8	Biłgoraj	Expansion	PGK Sp. z o. o w Biłgoraju	unknown
(…)	*More data will be provided in the report*			

Figure 50: Disposal areas in Dolnośląskie Voivodeship

More details are shown in the report



	Inh. own VV	Inh. other VV	Sum
Polnocny , DL	414.759	-	414.759
Polnoco-centralny , DL	963.036	-	963.036
Poludniowy , DL	609.859	-	609.859
Srodkowosudecki , DL	340.878	-	340.878
Wschodni , DL	192.116	53.177	245.293
Zachodni , DL	241.796	-	241.796
Sum	**2.762.444**	**53.177**	**2.815.621**
Disposal regions other VV	139.921		
Sum	**2.902.365**		

Legend for subsequent cards

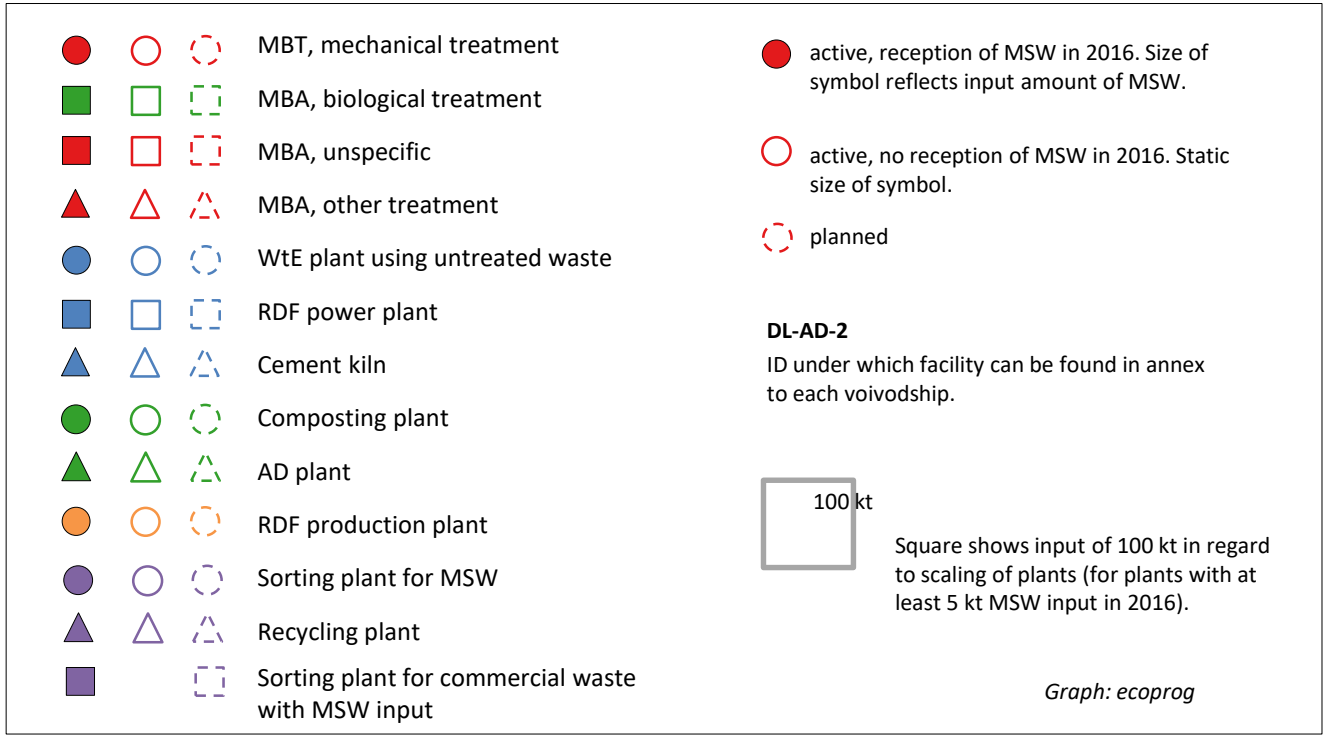
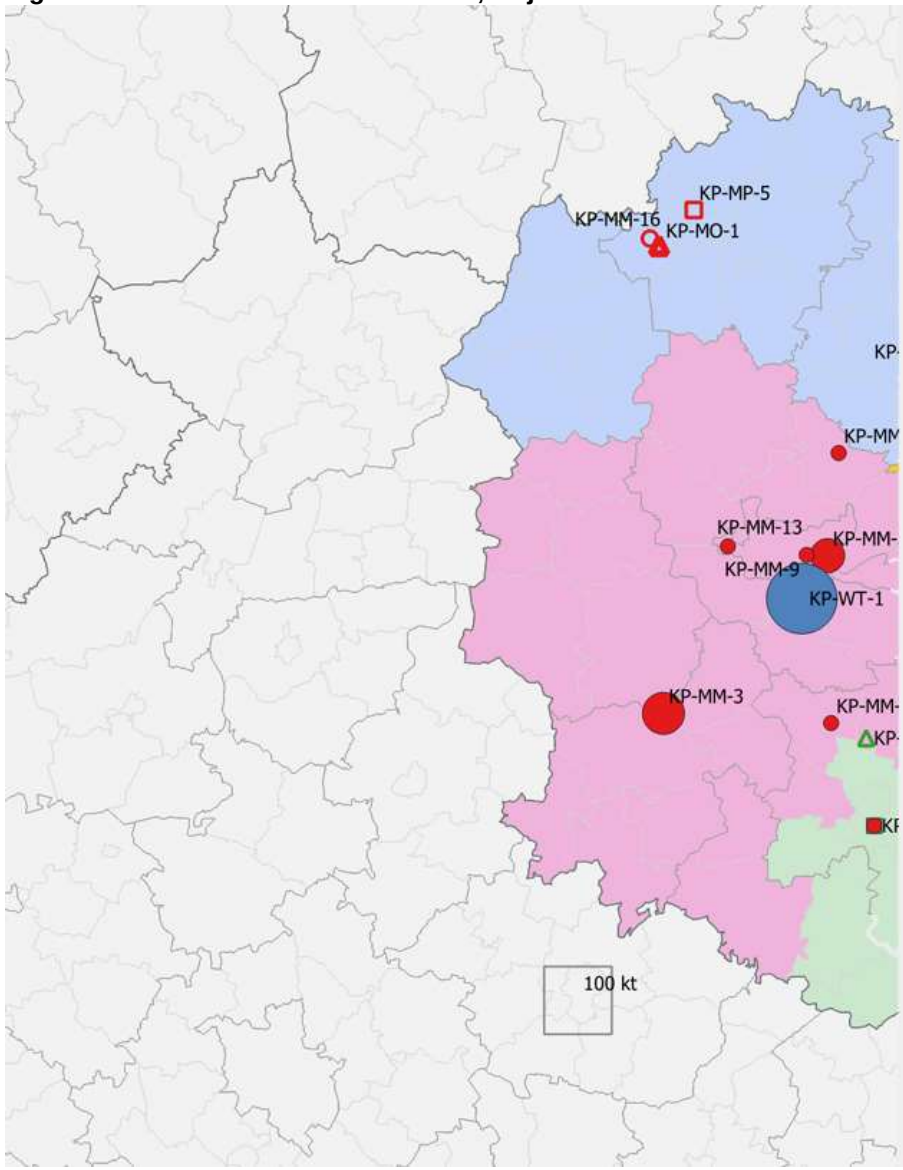
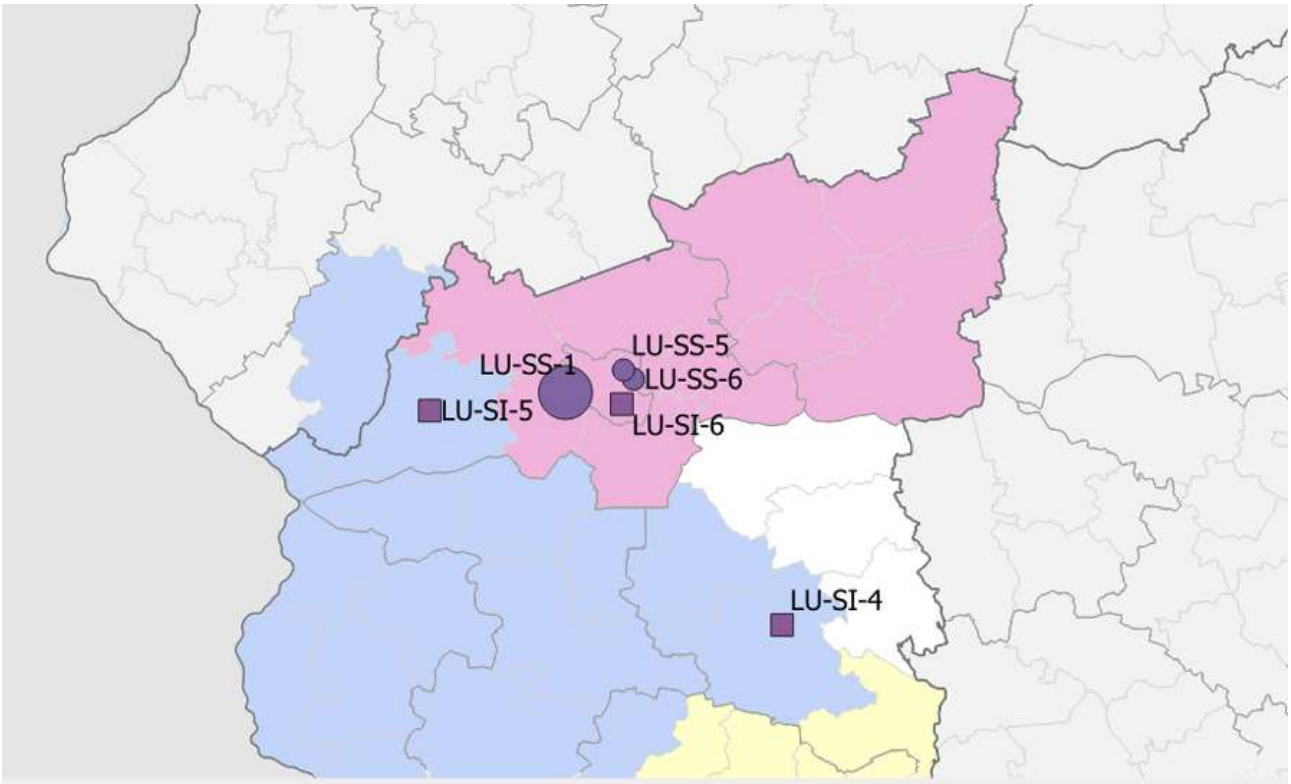


Figure 63: Plants in the RIPOK sector, Kujawsko-Pomorskie



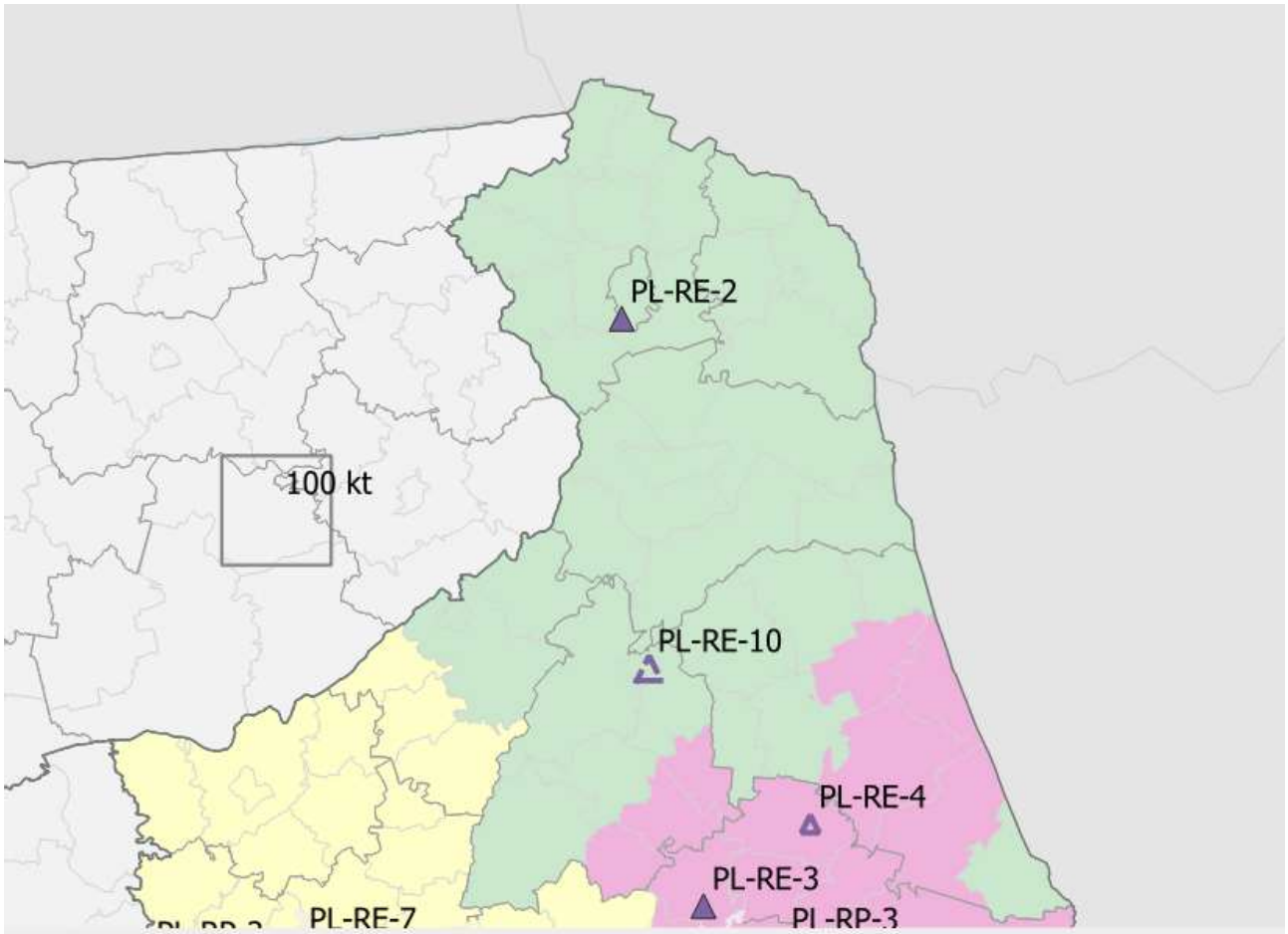
More details are shown in the report

Figure 101: Sorting plants for separately collected recyclables, Lubuskie



More details are shown in the report

Figure 162: Plants for the treatment of output materials, Podlaskie



More details are shown in the report

Plants and projects

Sort: alphabetically by location of the municipality.
A register using the plant ID can be found in the register, in a PDF document you can also use the text search.

Barciany

ZAKŁAD GOSPODARKI KOMUNALNEJ W BARCIANACH Sp. z. o.o.

WM-CO-2

Composting plant

Status: planned
RIPOK-Status: no

Capacity [t/a]: 200
Throughput 2016 [t]: 0
Planned investment [PLN]: 1.000.000
Planned start of investment: 2020

Barczewo

OLSZTYŃSKI ZAKŁAD KOMUNALNY Sp. z. o.o.

WM-CO-5

Composting plant

Status: planned
RIPOK-Status: yes

Capacity [t/a]: 10.000
Throughput 2016 [t]: 0
Planned investment [PLN]: 7.000.000
Planned start of investment: 2018

Bartoszyce

ZAKŁAD GOSPODARKI ODPADAMI Sp. z. o.o.
ul. Zbożowa 8, 11-200 Bartoszyce

WM-CO-23

Composting plant

Status: active
RIPOK-Status: no

Capacity [t/a]: 0
Throughput 2016 [t]: 48
of which MSW [t]: 48

WM-MP-5

MBT plant

Status: active
RIPOK-Status: no

Capacity [t/a]: 0
Throughput 2016 [t]: 580
of which MSW [t]: 266

Bartoszyce

"POLFER" Sp. z. o.o.
Bezledy, 11-200 Bartoszyce

WM-CO-15

Composting plant

Status: active
RIPOK-Status: yes

Capacity [t/a]: 17.000
Throughput 2016 [t]: 4.173
of which MSW [t]: 4.065
Planned investment [PLN]: 500.000
Planned start of investment: 2018

Bartoszyce

ZAKŁAD GOSPODARKI ODPADAMI Sp. z. o.o. W BARTOSZYCACH
ul. Zbożowa 8, 11-200 Bartoszyce

WM-SS-8

Sorting plant for separately collected MSW

Status: active
RIPOK-Status: no
Capacity [t/a]: 40.000
Planned investment [PLN]: 8.000.000
Planned start of investment: 2018

Bisztynek

"MIĘDZYGMINNY ZAKŁAD KOMPLEKSOWEGO PRZEROBU ODPADÓW KOMUNALNYCH SĘKITY Sp. z. o.o."
Bisztynek kolonia, 11-230 Bisztynek

WM-SS-6

Sorting plant for separately collected MSW

Status: active
RIPOK-Status: no

Capacity [t/a]: 25.000
Throughput 2016 [t]: 5.872
of which MSW [t]: 5.656

WM-CO-11

Composting plant

Status: active
RIPOK-Status: yes

Capacity [t/a]: 2.000
Throughput 2016 [t]: 3.332
of which MSW [t]: 111

(…)

(…)

ZP-CO-13

Composting plant

Status: planned
RIPOK-Status: no

Capacity [t/a]: 2.000
Throughput 2016 [t]: 0
Planned investment [PLN]: 2.500.000
Planned start of investment: 2025

Kamień Pomorski

EKO BUSINESS Sp. z. o.o.

ZP-SS-15

Sorting plant for separately collected MSW

Status: planned
RIPOK-Status: no

Capacity [t/a]: 50
Throughput 2016 [t]: 0
Planned investment [PLN]: 2.000.000
Planned start of investment: 2018

Kołbaskowo

STENA RECYCLING Sp. z. o.o.
ul. Aleja Kasztanowa 21, Przecław, 72-005 Kołbaskowo

ZP-RE-11

Recycling plant

Status: active
RIPOK-Status: no

Capacity [t/a]: 25.000
Throughput 2016 [t]: 1.362
of which MSW [t]: 0

Koszalin

PRZEDSIĘBIORSTWO SUROWCÓW WTÓRNYCH "KĘDRA" AGNIESZKA SERAFINKO
ul. Połczyńska 58, 75-816 Koszalin

ZP-SS-8

Sorting plant for separately collected MSW

Status: active
RIPOK-Status: no

Capacity [t/a]: 2.000
Throughput 2016 [t]: 61
of which MSW [t]: 0

Mierzyn

ZPHG JUMAR
ul. Długa 20 72-006 Mierzyn

ZP-SS-17

Sorting plant for separately collected MSW

Status: active
RIPOK-Status: no

Capacity [t/a]: 40.000
Throughput 2016 [t]: 0
Planned investment [PLN]: 1.000.000
Planned start of investment: 2018

Mirosławiec

ATF Sp. z. o.o. Sp. K.
Chojnica, 78-650 Mirosławiec

ZP-MM-16

MBT plant, mechanical treatment

Status: active
RIPOK-Status: yes

Capacity [t/a]: 65.000
Throughput 2016 [t]: 24.850
of which MSW [t]: 0

ZP-RE-3

Recycling plant

Status: active
RIPOK-Status: no

Capacity [t/a]: 16.500
Throughput 2016 [t]: 9.450
of which MSW [t]: 0

ZP-SS-18

Sorting plant for separately collected MSW

Status: active
RIPOK-Status: no

Capacity [t/a]: 10.000
Throughput 2016 [t]: 0
Planned start of investment: 2017

ZP-CO-2

Composting plant

Status: active
RIPOK-Status: no

Capacity [t/a]: 1.400
Throughput 2016 [t]: 777
of which MSW [t]: 0

Mokrawica

PRZEDSIĘBIORSTWO GOSPODARKI KOMUNALNEJ Sp. z. o.o.

ZP-CO-11

Composting plant

(…)

Register

ID numbers according to visualisation in maps, in alphabetical order.

DL-AD-1	126	DL-MB-3	113	DL-RE-20	107	DL-SI-8	108
DL-AD-2	110	DL-MB-4	119	DL-RE-21	126	DL-SS-10	114
DL-AD-3	125	DL-MB-5	120	DL-RE-22	108	DL-SS-11	115
DL-AD-4	114	DL-MB-6	120	DL-RE-23	111	DL-SS-12	119
DL-CO-1	118	DL-MB-7	107	DL-RE-24	120	DL-SS-15	112
DL-CO-10	126	DL-MB-8	107	DL-RE-25	114	DL-SS-21	117
DL-CO-11	114	DL-MB-9	113	DL-RE-26	121	DL-SS-22	125
DL-CO-12	114	DL-MM-1	119	DL-RE-27	111	DL-SS-23	113
DL-CO-13	116	DL-MM-10	126	DL-RE-28	114	DL-SS-25	108
DL-CO-14	118	DL-MM-11	123	DL-RE-29	114	DL-SS-4	123
DL-CO-15	122	DL-MM-12	119	DL-RE-3	106	DL-SS-40	118
DL-CO-16	113	DL-MM-13	119	DL-RE-30	121	DL-SS-41	124
DL-CO-17	114	DL-MM-14	120	DL-RE-31	112	DL-SS-44	112
DL-CO-18	117	DL-MM-15	113	DL-RE-32	112	DL-SS-45	120
DL-CO-19	122	DL-MM-16	111	DL-RE-33	112	DL-SS-46	107
DL-CO-2	123	DL-MM-17	117	DL-RE-34	116	DL-SS-47	107
DL-CO-20	107	DL-MM-18	108	DL-RE-35	109	DL-SS-48	111
DL-CO-21	124	DL-MM-19	125	DL-RE-36	106	DL-SS-5	114
DL-CO-24	113	DL-MM-2	118	DL-RE-37	107	DL-SS-52	117
DL-CO-25	109	DL-MM-20	110	DL-RE-38	108	DL-SS-56	125
DL-CO-26	125	DL-MM-21	115	DL-RE-39	115	DL-SS-57	119
DL-CO-27	119	DL-MM-22	111	DL-RE-4	115	DL-SS-6	118
DL-CO-28	120	DL-MM-3	125	DL-RE-40	121	DL-SS-61	115
DL-CO-29	125	DL-MM-4	106	DL-RE-41	121	DL-SS-62	118
DL-CO-3	120	DL-MM-5	113	DL-RE-42	121	DL-SS-63	107
DL-CO-30	120	DL-MM-6	112	DL-RE-43	124	DL-SS-64	107
DL-CO-31	124	DL-MM-7	113	DL-RE-44	124	DL-SS-65	119
DL-CO-4	111	DL-MM-8	107	DL-RE-45	106	DL-SS-66	119
DL-CO-5	126	DL-MM-9	111	DL-RE-46	107	DL-SS-67	126
DL-CO-6	115	DL-MP-1	123	DL-RE-47	124	DL-SS-68	109
DL-CO-7	112	DL-MP-2	122	DL-RE-48	108	DL-SS-69	115
DL-CO-8	109	DL-RC-1	110	DL-RE-49	115	DL-SS-70	122
DL-CO-9	106	DL-RC-2	113	DL-RE-5	109	DL-SS-71	122
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