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Drastic changes on market for mechanical biological waste treatment

Until 2025, approximately new 120 plants for the mechanical biological treatment of waste (MBT plants) will be constructed in Europe, which is a slower increase than in the past. At the same time, the modernisation business is growing – due to new regulations for RDF and separate waste collection. These and other results are the content of a new ecoprolog study on the European MBT market.

The business with mechanical biological waste treatment plants (MBT plants) continues to be a strong market. In the past 5 years, an average of about 25 new MBT plants were constructed annually in Europe. In this way, an average of about 2.2 million annual tons were commissioned each year. Europe now has a total of about 570 active MBT plants with a treatment capacity of 55 million tons.

ecoprolog expects another 120 facilities with an estimated capacity of almost 10 million annual tons to be commissioned between 2017 and 2025. The pace of the increase therefore slows down, however, market activities continue to be very dynamic. One main reason for this is that many EU countries have already completed to develop most of their residual waste treatment infrastructure.

However, this development varies significantly by country. Most of the new plants will be built in the EU member states in Eastern and Central Europe. Many of them are still busy with developing basic infrastructure for residual waste disposal. “In these states, MBT technology is often considered as the better option and favoured over the thermal treatment of untreated waste”, says Janne Heumer, project manager of the study. “In rural areas especially, waste pretreatment in MBT plants often makes more sense in logistical terms and is furthermore easier for political actors to implement.”

Other countries already have sufficient capacities for residual waste disposal. States such as France and UK will realise some of their already planned projects, but focus their future measures on increasing recycling and the organic treatment of biowaste. Both require an advanced separate waste collection scheme, which reduces residual waste amounts.

“We even expect the number of MBT plants to decline in some countries”, says Heumer. This holds especially true for Germany, where, amongst other factors, the obligatory separate biowaste collection (introduced in 2015) endangers the basis of existence of some facilities.

In many countries, the modernisation of existing plants will replace the new construction business. One reason for this is the production of RDF, which is increasingly pushed to reduce the landfilling fraction of the MBT plants. France already passed a new legislation for this in 2015 and other states such as Spain and Portugal are also discussing such measures. These discussions are intensified by the planned EU Circular Economy Package, and especially by its output criterion, which could result in the landfilling fraction from MBT plants being considered as disposal. And disposal should be reduced.

However, the end of an MBT plant does not necessarily mean that all activities stop at the respective site, even not in countries such as Germany. Some MBT sites simply separate their

processes, into a mechanical processing of residual waste and a biological treatment of the now separately collected biowaste. Such actions also result in new investments.

The study “The Market for Mechanical Biological Waste Treatment in Europe” is now available at www.ecoprolog.com

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