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## **Biogas from biowaste booms in Europe**

**Within the next 10 years, around 650 new biowaste AD plants with a capacity of circa 850 MW<sub>el</sub> will be commissioned in Europe. A new ecoprolog study analyses the European market for biowaste AD plants as well as the different phases of realising such projects.**

Between 2014 and 2023, the number of biogas plants fermenting municipal and industrial biowaste in Europe will increase by about 650 to over 1,450. Within the same period, the installed capacity will almost double – by 850 MW<sub>el</sub> to around 1,750 MW<sub>el</sub>.

This growth is mainly caused by the specifications of the European energy and waste legislations. By implementing them through national laws, these specifications significantly determine both the structure of revenues and the biowaste amounts to be used in biowaste AD plants. The targets of the EU Landfill Directive, the EU Waste Framework Directive and the EU Renewable Energy Directive have to be fulfilled by 2020 at the latest. Subsequent specifications are yet uncertain. From a present-day perspective, the years with the strongest growth of newly constructed biowaste AD plants will therefore be the ones up to 2020.

Most biowaste AD plants will be constructed in Great Britain, France, Germany and Italy, the four European states with the largest populations. Despite all the differences in consumers' behaviour, settlement and industrial structure, it is especially the number of inhabitants that determines the biowaste amounts. With the right legislative frameworks for waste and the generation of renewable energies, the markets for the fermentation of biowaste in these countries will be able to grow quickly.

Within the next 10 years, the United Kingdom will experience the strongest growth of biowaste AD plants. An increasing landfill tax puts pressure on the waste management system to find alternative utilisation methods for biowaste. Additionally, there are very high compensations for biogas from biowaste. The situation in France is very similar, even though the country does not only support the construction of biowaste AD plants but also the development of mechanical biological treatment plants (MBT plants) with integrated biowaste AD plants.

The situation in Germany is currently characterised by a stricter waste legislation and a realignment of the energy legislation. The separate collection of biowaste has been obligatory throughout Germany since January 2015, which is a unique regulation in Europe and will stimulate the construction of new biowaste AD plants. On the other hand, biogas subsidisation was restricted in late 2014. However, positive stimuli prevail in the German waste management system and the country will therefore remain one of the growth markets for biowaste AD plants.

When analysing Spain, it becomes obvious that a successful biowaste AD plant market needs more than a large population. In terms of number of inhabitants, Spain has enough biowaste for fermentation. Still, the Spanish market for biowaste AD plants stagnates, which is mainly due to the very complex and comparatively low biogas compensation as well as the weak support of the waste management system.

Landfilling still is the dominant way of disposing of waste in the Eastern European countries, which is why most of them have a lot of catching up to do when it comes to their waste management systems. If these countries want to comply with the specifications of the EU directives, they will have to drastically change this situation in the years to come. By doing this,

large biowaste amounts will be made available for alternative utilisation methods, e.g. for treatment in biowaste AD plants.

Our detailed investigation and current analysis of the European market for biowaste AD plants is of interest for plant manufacturers, suppliers, operators, disposal bodies, associations, research institutes and consultants. As many of them lack experience with the technology of biowaste AD plants and with developing such projects, ecoprolog's study also deals with project planning. We have analysed all three important project phases in detail, from having the idea for to completing such plants, meaning the phases of design and planning, approvals as well as construction and commissioning. We have furthermore analysed and described the most important operators and plant manufacturers. The study "The Market for Biowaste AD Plants in Europe" can be ordered at: [www.ecoprolog.com](http://www.ecoprolog.com)

As a respected industry expert, ecoprolog accompanies clients in dealing with implementation-oriented management issues with political, technical or economic backgrounds in the environmental and energy technology markets. We work in the fields of strategy consulting, market and competition analyses as well as multi-client studies.