



Waste-to-energy in Eastern Europe 2020

Development of waste streams, plant capacities and prices, competition and strategies

The study is available and consists of 601 pages.

- Analysis of the legal circumstances and the countries in detail
- Analysis of waste streams (accumulation and disposal routes) and plant capacities per country
- Development of quantities, prices and the market volume
- Competition analysis of the different market sectors
- Profiles of the market actors
- Trends, opportunities and risks
- Description and evaluation of strategies for the market actors

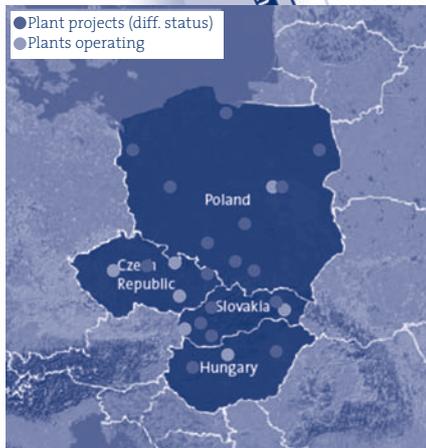


Figure 1: MSW incineration plants (operating plants and plant projects)

With their accession to the European Union, the countries of Eastern Europe committed their legislation to a substantial number of new legal conditions and adopted in particular the directives on waste management. While the directives have been adopted mostly in the national law, the waste-to-energy market in the countries suffers strongly from a lack of enforcement.

The landfilling of the municipal and commercial mixed waste fractions with a share of between 80 to 90 per cent is still the predominant waste disposal route. Besides mixed waste fractions, landfilling constitutes a common way of waste disposal for other waste fractions such as light packaging waste or production-specific waste from the paper industry.

On the other hand, there are several projects for waste-to-energy facilities in the countries to meet the future requirements (see Figure 1 with existing and planned MSW incineration plants). The problems for their realization are routed in the local public and political opposition, the lack of financial means as well as unstable investment conditions.

Based on the above-outlined status quo, the present study describes the

future development of the waste-to-energy market up until the year 2020. Next to the prognosis of accumulated waste amounts, the study elaborates on the amounts in the waste-to-energy stream, the capacities and the allocation of refuse-derived fuel (RDF). Furthermore, it aims to construct the future market volumes with a prognosis of RDF gate fees (see Figure 2).

In addition to proposing a market forecast, the study scrutinizes further aspects of the waste-to-energy market in the respective countries. The conditions in the countries are presented in detailed country profiles. The chapters on the status quo, the technologies applied and the market competition offer an exhaustive description of the actual situation. By reading the chapters on trends, opportunities and risks as well as strategies, the reader can get a feeling of the specific developments in the countries and tools to gain profit from them.

The results of the study stem from desk research and qualitative interviews with the relevant market actors and experts. Fifty-seven in-depth interviews were conducted with plant operators, constructors, waste management companies and other experts in the field.

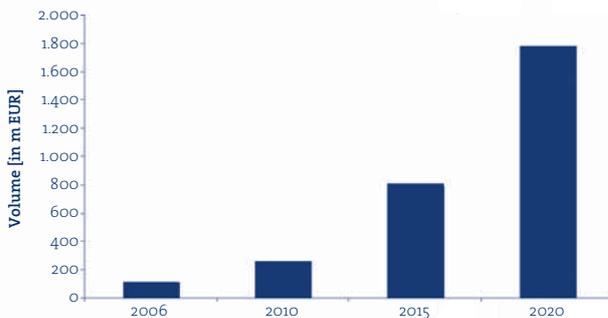


Figure 2: Market volume waste-to-energy in the Eastern European countries (Reference scenario)

value through information.

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Aims and benefits of the study

On the basis of current developments and discussions, the study demonstrates and analyses the future development of the waste-to-energy market up until 2020 in terms of different scenarios. Alongside the quantitative analysis of the market, (e.g. quantities and price developments), the market will be portrayed via a qualitative depiction of e.g. competitor intensity, opportunities and risks, etc.

Based on these data and forecasts, the study enables its readers to assess the plausibility of their own strategies and market data. Furthermore, the analysis of trends, opportunities and risks within the market contributes towards optimum market positioning in decisions pertaining to strategy and investment.

Methodology

trend:research implements a variety of field and desk research methods. Alongside extensive intranet and internet database analyses (including journals, publications, conferences, company reports, etc.), the market potential study comprises approximately 57 structured interviews with the following target groups:



The analysis of field and desk research data leads to reliable conclusions regarding markets, trends, competition and dealing with the options within the waste-to-energy market. By means of the multivariate Trend-Impact-Analysis™, data and information are quantified and structured into a knowledge database. This is then used to build scenarios and deduce accurate market predictions

For whom is the study intended?

The market potential study is aimed at all stakeholders within the international market of energy production from wastes and residues, thus providing a fundamental view of all data, discussions and market movements relevant to this market.

By means of detailed analyses of waste streams, pricing and the market itself, the study offers an overview for stakeholders in the waste management industry, operators of power plants and energy facilities and investors.

The study is also aimed at facility constructors and planners, as well as further service providers from the waste management industry. The study is of particular use and relevance to committee chairs, management boards, industrial strategy developers, marketing and sales representatives.

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 - Industrial waste disposal in Germany: Potential in energy recovery in production and hazardous waste**, 01/06, 995 p., EUR 4,800.00
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