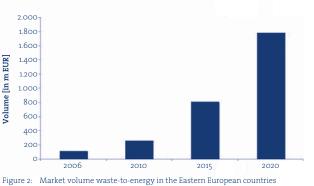
Environment and Waste Management Market Potential Study

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.



plant projects)



(Reference scenario)



- \rightarrow Analysis of the legal circumstances and the countries in detail
- \rightarrow Analysis of waste streams (accumulation and disposal routes) and plant capacities per country
- \rightarrow Development of quantities, prices and the market volume

 \rightarrow Competition analysis of the different market sectors → Profiles of the market actors

- → Trends, opportunities and risks
- \rightarrow Description and evaluation of
- strategies for the market actors

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.

value through information.

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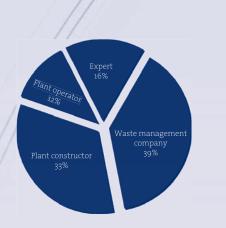
Aims and benefits of the study On the basis of current developments and

discussions, the study demonstrates and analyses the future development of the waste-to-nergy 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-AnalysisTM, 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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42.5 43 5 5.1 5.1 5.1.1 5.1.2 5.1.3 5.1.4 5.1.1 5.1.2 5.1.4 5.1.1 5.1.2 5.1.1 5.1.2 5.1.2 5.1.2 5.1.2 5.1.2 5.1.2 5.1.2 5.1.2 5.1.2 5.1.4 5.1.2 5.1.4 5.1.2 5.1.5 5.1.1 5.1.2 5.1.5 5.1.5 5.1.5 5.2 5.2 5.2 5.2 5.2 5.2 5.2 5.2 5.2 5	Other waste streams Status quo and development of average gate fees in the countries Technologies Mechanical biological treatment and refuse derived fuel treatment facilities Sorting Manual sorting Magnetic separation Eddy current separation Electrical sorting Gravity separation Optical sorting Flotation Classifying Screening (sieving) Winnowing Communition Drying Mechanical dehydration Thermal drying Compression Baler Briquetting Pelleting Conveyancing Storing Facilities for energy recovery Black coal and lignite power stations Stationary and circulatory fluidized bed incineration Dust combustion Dry combustion Wet bottom firing Pyrolysis and deaeration Overview Cement plants	180 183 187 187 188 189 190 191 192 193 194 195 196 207 206 207 210 211 212 213 213 218 224 225 227 228 230
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