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Thermal waste treatment in Italy: project boom, exports to decline in the medium term

Italy is the largest exporter of waste for thermal waste treatment (TWT) in Europe; at the same time, the country is the largest emerging market for the construction of new TWT plants. As Italy's TWT infrastructure expands, the pressure to export waste will decrease. ecoprog presents its analysis on how this development will unfold in the new market study *Thermal Waste Treatment in Italy 2045*.

Italy generates around 30 million tonnes of municipal solid waste per year. Over the past decade, the country has made progress in separate collection and recycling and has reduced the share of municipal waste sent to landfill from 26% in 2015 to 15% in 2024. Numerous landfills have been closed, partly as a result of the implementation of the EU Landfill Directive adopted in 1999. Some landfills were closed due to EU enforcement: in total, Italy has paid around 600 million euros in fines to the EU for non-compliant landfills and a lack of disposal capacity, and some of these payments are still ongoing.

However, the expansion of thermal waste treatment (TWT) has not kept pace with the decline in landfilling. To this day, the volume of waste treated in Italian TWT plants is still smaller than the combined volume landfilled and exported for thermal treatment abroad. Italy's 36 TWT plants have a combined capacity of around 6.9 million tonnes per year. So far, Northern Italy dominates: Lombardy, Emilia-Romagna and Piedmont account for almost two thirds of capacity, while regions such as Sicily, Marche and Umbria have no TWT plant at all.

As a result, Italy has become an important supplier of waste for the European TWT market. TWT exports rose from around 0.5 million tonnes in 2018 to 1.8 million tonnes in 2023. About 60% of this volume went to TWT plants in countries such as Germany, Austria and the Netherlands, while about one third was used as refuse-derived fuel in the cement industry, for example in Greece and Cyprus.

In response to the domestic disposal crisis, the planning of new TWT plants in Italy has boomed in recent months. ecoprog has identified more than 20 TWT projects with a combined capacity of around 5 million tonnes per year. Unlike in the past, a growing number of TWT projects is also being included in regional plans – a key milestone for their realisation. Among others, a plant with a capacity of 600,000 tonnes per year is currently under construction near Rome, while projects in Palermo and Catania in Sicily, with a similar combined capacity, are currently being tendered.

In the medium term, the commissioning of new TWT plants will decrease the pressure to export waste from Italy. Further developments, such as the planned inclusion of TWT in the EU Emissions Trading System from the early 2030s, will also make exports more costly – while, at the same time, landfill capacities in Italy will continue to be reduced.

The study *Thermal Waste Treatment in Italy 2045* analyses the Italian TWT market in detail. It covers waste volumes, infrastructure, competition and prices, profiles all 20 Italian regions and projects the market development and the export pressure until 2045 in three different scenarios. Further information is available at www.ecoprog.com.

ecoprog is a consulting firm specialising in environmental and energy technology. The company has been active in these markets for more than 20 years as a market consultant and is an established industry insider. Typical areas of activity include market and competitive analyses, commercial due diligence, feasibility studies and material flow analyses.

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