

Continued Investments in Hazardous Waste Incineration

Despite the current crisis in the chemical industry, the demand for hazardous waste disposal remains high. The volume of hazardous waste has increased by more than 30% over the past 10 years. Projects with a total capacity of around 400.000 tonnes per year are currently under construction or in planning. This is the result of a recent market study by ecoprog.

According to EU waste statistics, over the past 10 years, the volume of hazardous waste has risen by more than 30% to nearly 120 million tonnes. These increasing volumes present major challenges for the waste management industry in Europe. Over the same period, landfill disposal of hazardous waste increased by 70% - even though reducing landfill volumes is a key objective of European waste policy.

As a result, thermal treatment is playing an increasingly important role in hazardous waste management in Europe. Currently, there are more than 90 hazardous waste incineration plants in Europe with a combined capacity of over four million tonnes per year. In addition, there are more than 100 further facilities in the industry and in medical waste disposal that also almost exclusively incinerate or thermally treat hazardous waste. Hazardous waste is also co-incinerated in other types of facilities such as cement kilns, municipal waste incinerators, and waste wood power plants.

However, thermal treatment capacities for hazardous waste are distributed very unevenly. While countries such as Germany and France have very high capacities, other EU countries have no hazardous waste incineration plants in operation at all. As a result, more than 1.6 million tonnes of hazardous waste were exported abroad for disposal within Europe in 2022.

To reduce dependence on waste exports, some countries are planning to expand hazardous waste incineration capacity. At the same time, many established markets face a need for modernization. Europe's existing hazardous waste incineration plant fleet is old; in eleven countries, the average age exceeds 30 years. Currently, projects for the construction or modernization of hazardous waste incineration plants totaling 400.000 tonnes per year are known in Europe.

It remains unclear how the current crisis in the chemical industry and other sectors, such as the automotive supplier industry, will affect the market in the long term. While short term volume pressure has eased, long-term disposal demand remains.

The ecoprog market study „The Market for Hazardous Waste Incineration Plants in Europe“ analyzes technical fundamentals, market drivers, existing facilities, projects, and competition in the thermal treatment of hazardous waste in Europe. The study is available at: www.ecoprog.com

ecoprog is a consulting company specializing in environmental and energy engineering. In these markets, ecoprog operates as a market consultant and is an established industry insider. Typical activities include market and competitive analyses, commercial due diligence, feasibility studies, and material flow analyses.