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## **Europe's sewage sludge disposal market in transition**

**The market for sewage sludge disposal in Europe is shifting. Landfilling is being phased out, agricultural use is still dominant, and mono-incineration is on the rise. There are now more than 200 mono-incineration plants and projects across Europe. These are findings of ecoprolog's new Market Study Sewage Sludge Disposal in Europe.**

The European sewage sludge disposal market has shifted considerably throughout the past decades. In the past, large volumes of sludge were landfilled or dumped into water bodies. Today, 50% of European sludges are used in agriculture and 25% are treated thermally. 10% are currently still landfilled, but this practice is being phased out, and sludges are net diverted to thermal treatment.

Using sludges in agriculture has been criticised due to the presence of various pollutants such as heavy metals, organic pollutants, pathogens, and microplastics. Many European countries, such as Italy, Sweden or the Netherlands, have therefore introduced more and more stringent legislation around sludge use in agriculture. Others have even banned the practice altogether. This leaves incineration as the only alternative.

Thermal treatment of sludges largely eliminates pollutants and has therefore gained in popularity. Mono-incineration in particular is on the rise, currently making up almost 50% of thermally treated sludge, as it allows for the recovery of increasingly valuable phosphorous. Phosphorous is lost during sludge co-incineration in WtE, cement, and coal plants. Co-incineration in coal plants will inevitably be phased out along with the coal exit. In many cases, this leaves no alternative but mono-incineration.

Along with this trend, Europe has experienced and will continue to experience a growing sludge mono-incineration market. In early 2024, there were 112 sewage sludge mono-incineration plants operational across Europe, and more than 90 projects were in different stages of planning. According to ecoprolog's prognosis, the market will grow from 2 million to 3.5 million tpy capacity in 2035.

So far, the market has been dominated by municipal actors seeking to dispose of their own sludges. Recently, more and more private companies have been entering the market in order to profit from the rising demand.

The market report provides detailed information regarding plant and project size, background, timeframe, and operating companies. It maps the past, present, and future of sludge disposal in 30 European countries. It discusses relevant technologies in wastewater treatment, sludge treatment, and sludge disposal. And it analyses key factors that drive the

sludge disposal market in Europe, while critically assessing data and transparently stating assumptions. The Market Study Sewage Sludge Disposal in Europe is now available at: [www.ecoprolog.com](http://www.ecoprolog.com).

### **About ecoprolog**

ecoprolog is a consultancy specialising in the fields of environmental and energy technology. It has developed into a renowned expert on these markets. ecoprolog's typical activities include market and competition analyses, commercial due diligence, economic feasibility studies, and material flow analyses.

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