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Waste to Energy: China struggles, Europe remains stable

The global WtE market is currently characterised by different developments. While market activities and projects are increasing in many Asian countries, its largest market, China, is showing strong signs of market saturation. In the traditional European markets, maintenance and modernisation are the most important drivers for market growth.

ecoprolog has published the 17th edition of its annual study on the global plant and operator market for thermal waste treatment.

In early 2024, more than 2,800 thermal treatment plants with a total capacity of around 576 million annual tonnes of waste were operational worldwide. ecoprolog estimates that more than 3,100 plants with a capacity of over 700 million tonnes will be in operation by 2033.

The Chinese market is experiencing a strong downturn. The number of newly awarded projects has already decreased significantly in recent years. In 2024, only 40 new plants with a total capacity of around 11 million tonnes per year went into operation, compared to 90 plants in the previous year, which had been a weaker year already. In 2021, a record number of 190 new plants with a capacity of around 64 million annual tonnes were commissioned. In particular, market saturation can be observed in the densely populated eastern parts of the country. Regional overcapacities have emerged already, and, in some cases, plants are even being shut down due to insufficient waste volumes.

Other Asian markets such as Thailand, Indonesia, India, and Malaysia are developing dynamically, with around 9 additional projects identified in India alone in 2024. The demand for WtE technology is also increasing in the economically stronger countries of the Middle East. There are already 5 known projects in Saudi Arabia and Qatar alone.

The European market for thermal waste treatment is stable. In traditional markets such as France, Germany, and the Scandinavian countries, maintenance and modernisation projects are the most important drivers for market growth. Additionally, new plants are being commissioned in countries such as Poland and the Czech Republic. In these two countries alone, 10 projects are currently being constructed or have been approved. In the UK, however, which had been the boom market of the last decade, market saturation is progressing. In 2024, only 4 projects have received planning permission or an environmental permit.

The new market report “Waste to Energy 2024/2025” is now available at [ecoprolog.com](https://www.ecoprolog.com).

About the Market Study “Waste to Energy”

ecoprolog’s “Waste to Energy” study is the industry’s leading standard work. It includes a forecast of the global market development by country until 2033 and contains data on more than 3,650 waste treatment plants and projects. Moreover, it analyses market factors, trends, and support schemes for the 50 most important national markets and worldwide. Further information on the new edition “Waste to Energy 2024/2025” is available at [ecoprolog.com](https://www.ecoprolog.com).

About ecoprolog

ecoprolog is a consultancy specialising in the fields of environmental and energy technology. In these markets, ecoprolog has been working as a market consultant for 20 years and developed into an established industry insider. Typical activities of ecoprolog include market and competition analyses, commercial due diligence, economic feasibility studies, and material flow analyses.

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