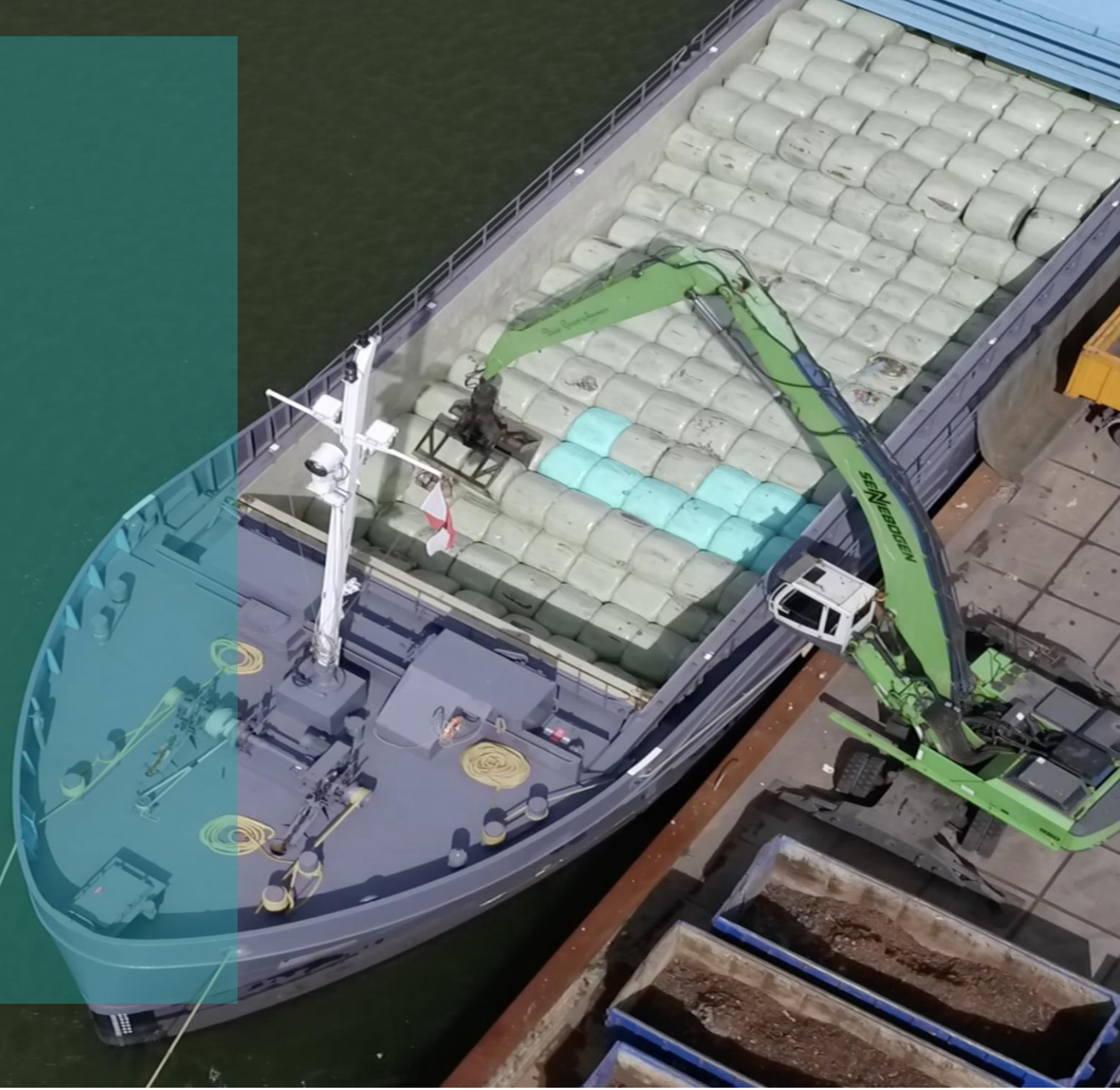


RDF Market Outlook

*RDF Conference
November 2017*

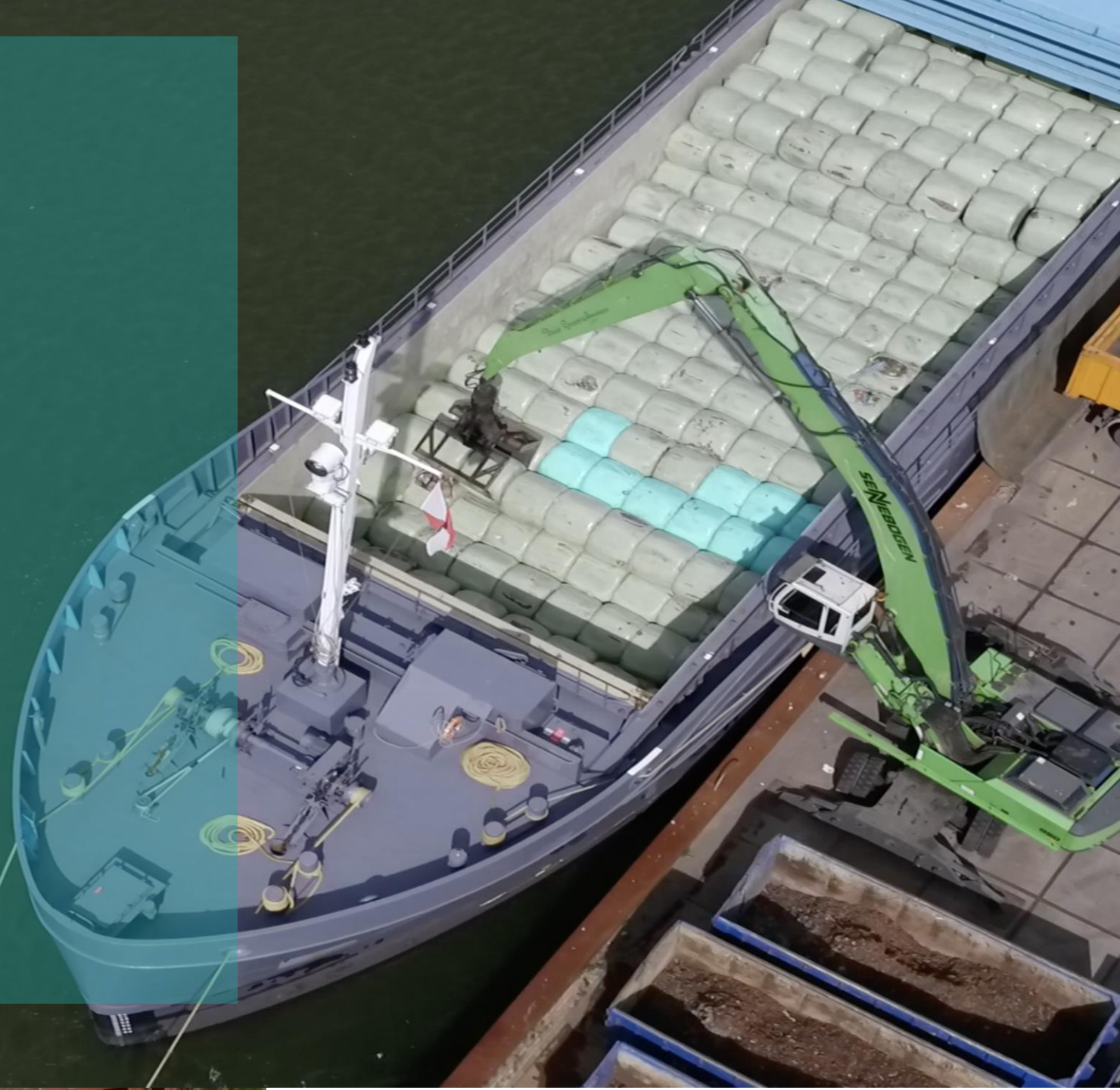
*Harriet Parke,
RDF Industry Group
Secretariat*



Agenda

- Introduction
- Market Development
- Market Outlook
- Summary

Introduction



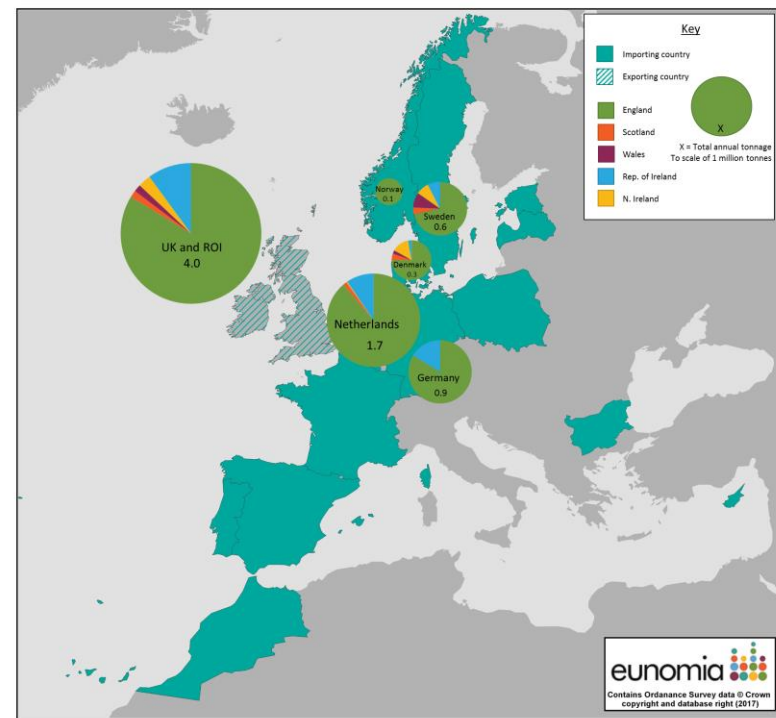
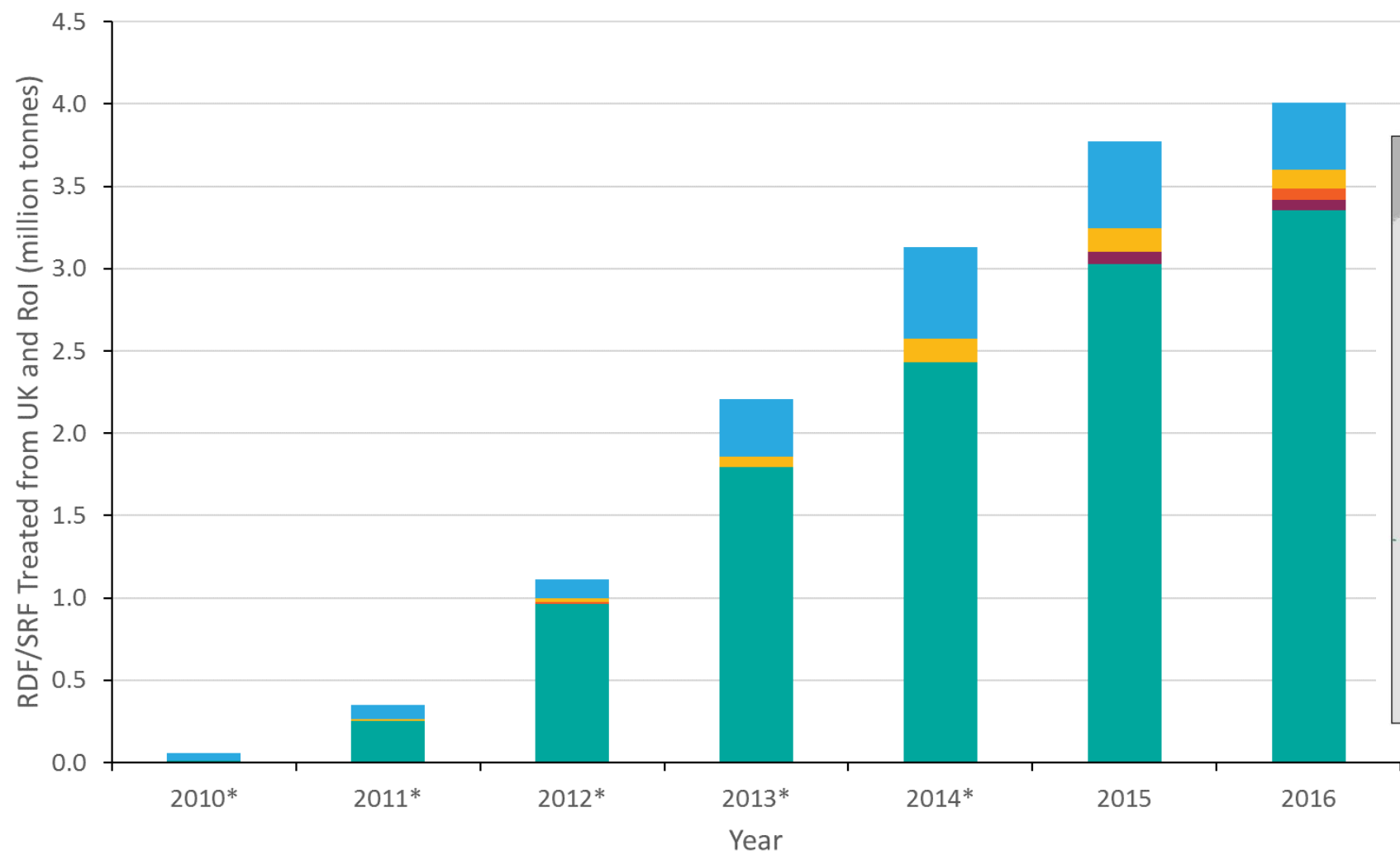
RDF Industry Group

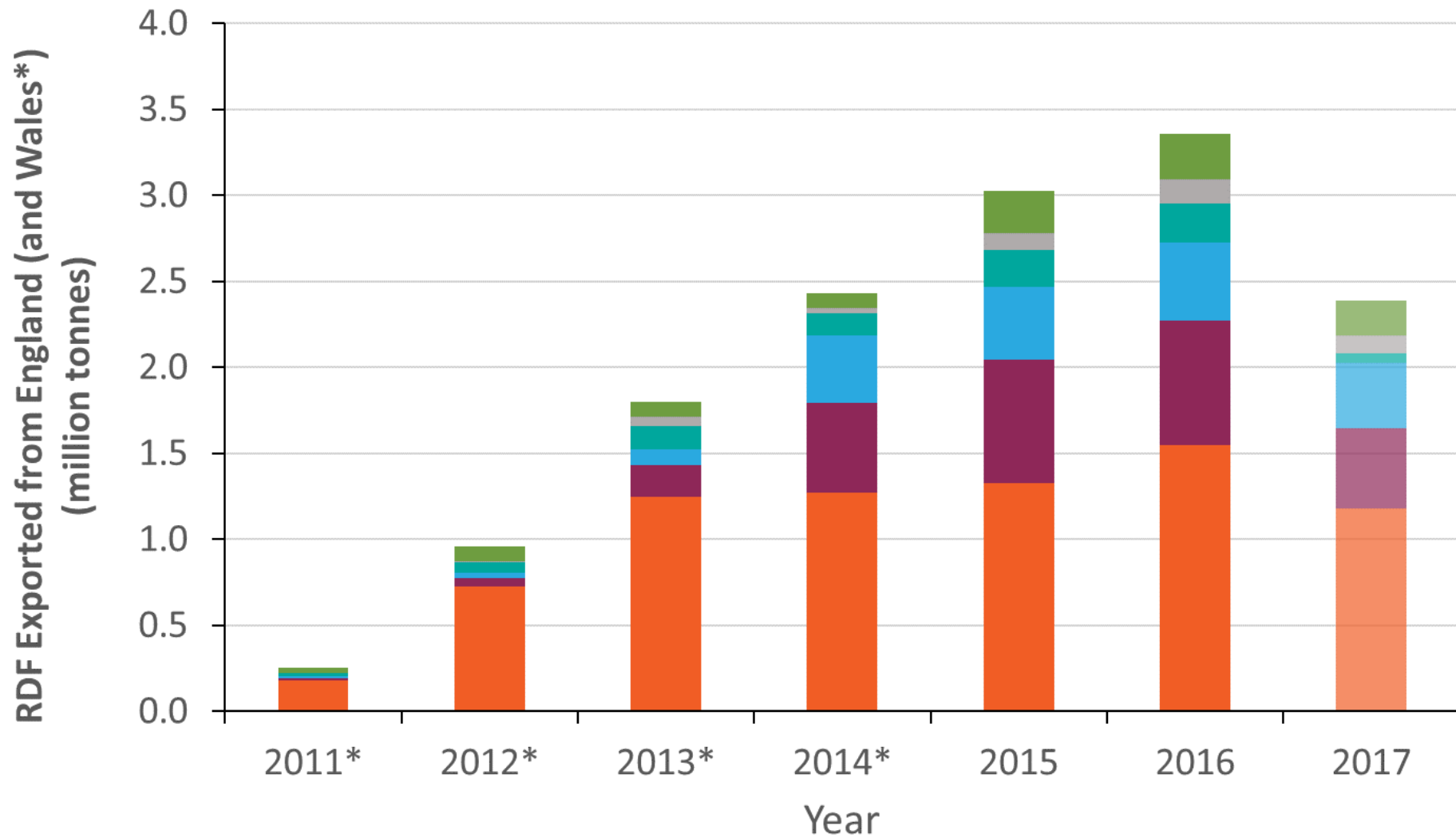


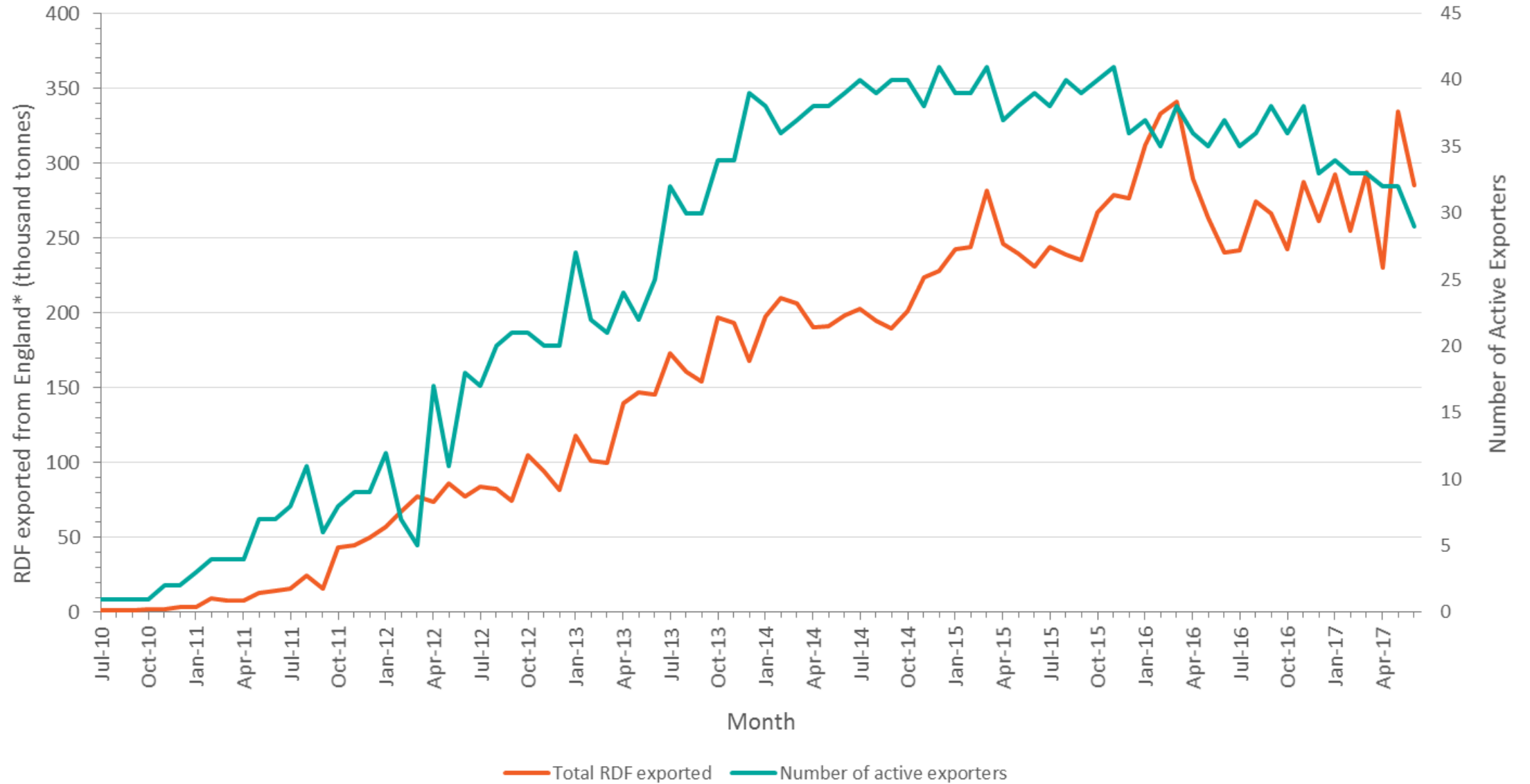


Market Development t









*2010-2014 includes exports from Wales

Maturing Market

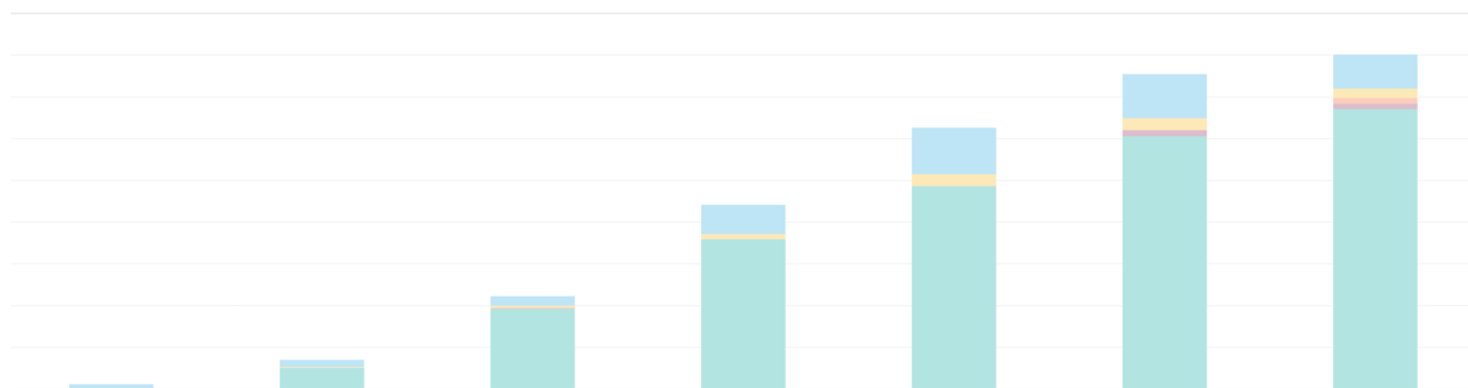
Market
Expansion

Market
Maturing

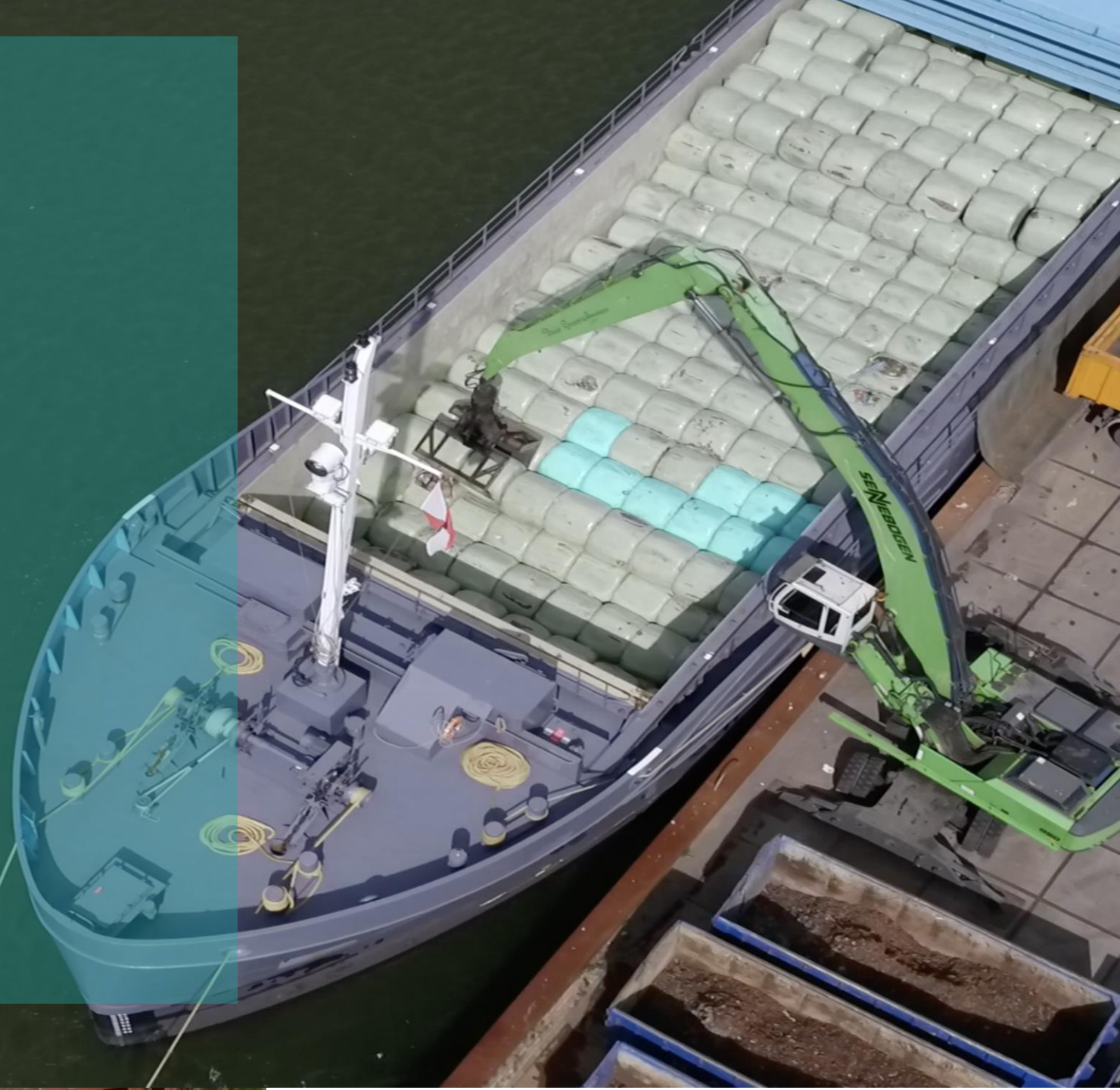
Market Outlook

2010

2017



Market Outlook



Market Drivers



Tariff and Non-tariff Boundaries

- EU TFS rules implement OECD rules
- Key nations importing UK RDF are OECD signatories
- Revert to WTO rules with regards to imposing tariffs on export
- Status of RDF uncertain under WTO rules
 - 'goods' vs 'service'
- Could look to Norway to Sweden example



Exchange Rate

- Sterling weakened by ~20% against Euro
- Cost increases of at least £5 per tonne
 - Contracts with gate fees in euros hit hardest
- Potential for further increases
 - Unless favourable trade deal is reached
- May see European operators reduce gate fees to remain competitive and absorb currency changes

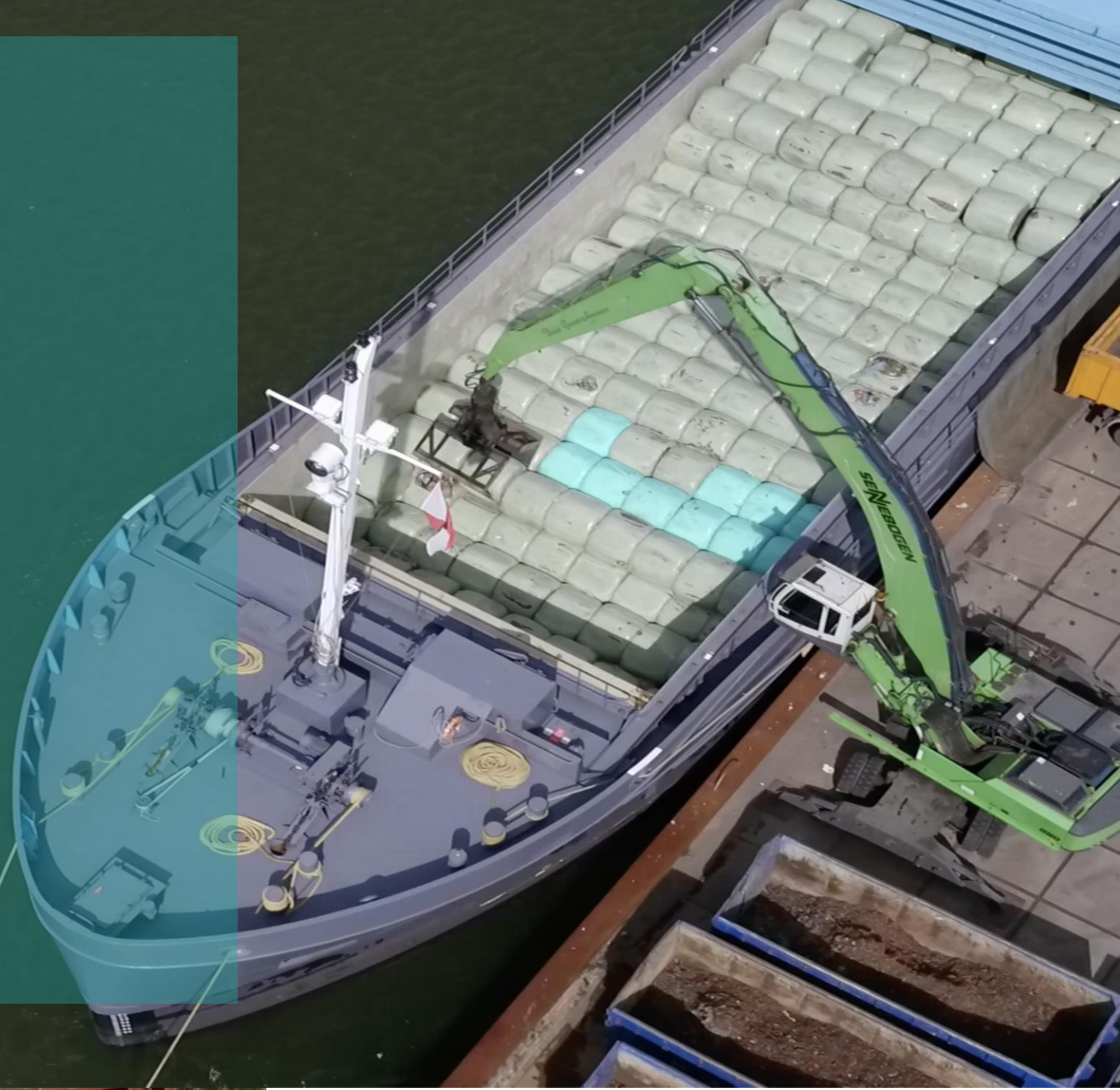


Logistics

- Concern about customs rules and port delays
 - Issues with RDF storage at the port



Summary



In Summary...

- Rapid growth in exports since 2010
- 2017 on course for similar tonnages to 2016
- Market maturing and number of exporters consolidating
- Some uncertainty post-Brexit but framework for tariff and non-tariff boundaries remains
- Concern over possible port delays



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