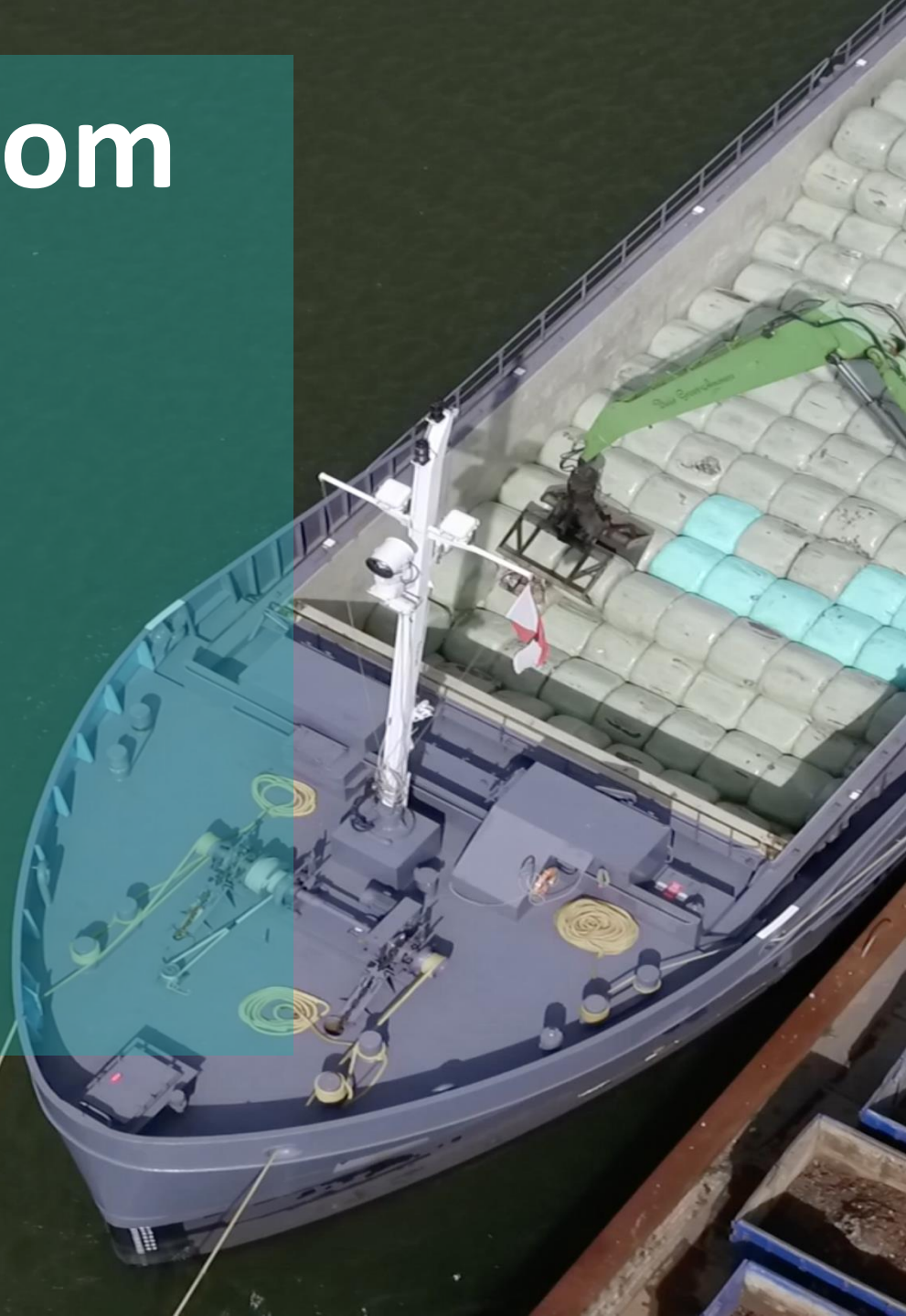


RDF Import from the UK

*IFAT
May 2018*

*Harriet Parke,
RDF Industry Group
Secretariat*



Agenda

- Introduction
 - Code of Practice
- Market development UK - Europe
- Wider European Market
- Market Outlook
- Summary

Introduction



RDF Industry Group



3.6

million tonnes

31

members



>65%

**of RDF imported
from UK market**



Code of Practice



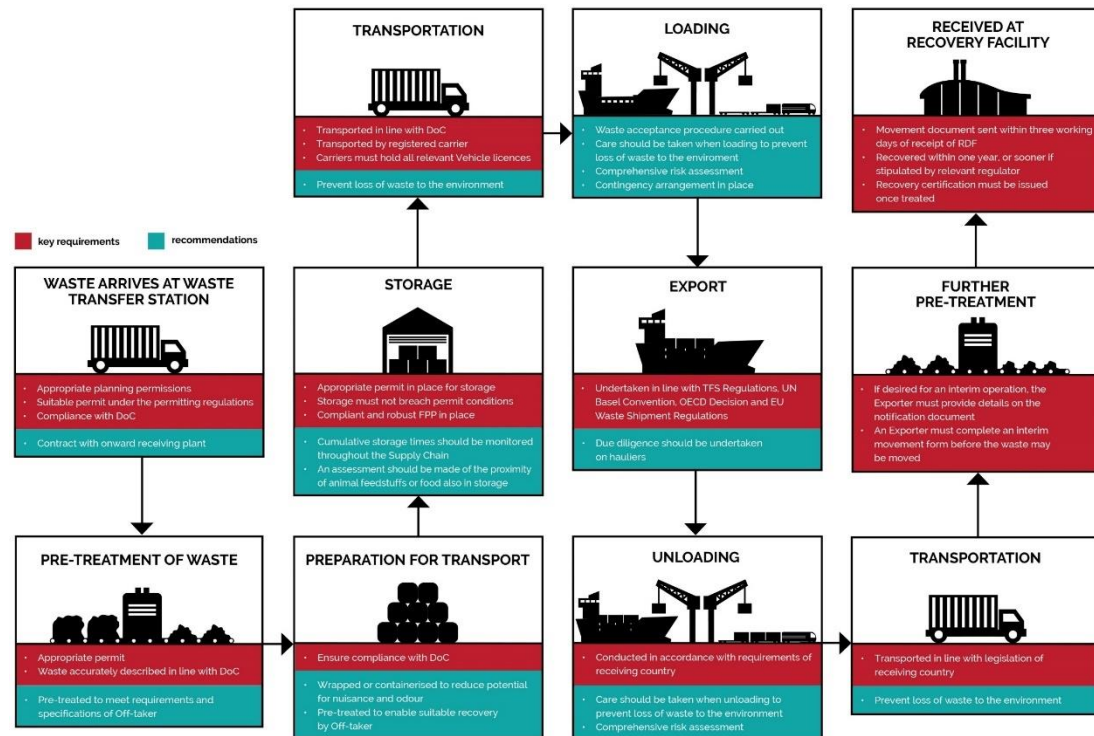
Code of Practice

REFUSE DERIVED FUEL CODE OF PRACTICE FOR THE UK

VERSION 1

OCTOBER 2017

Image courtesy of Ashens

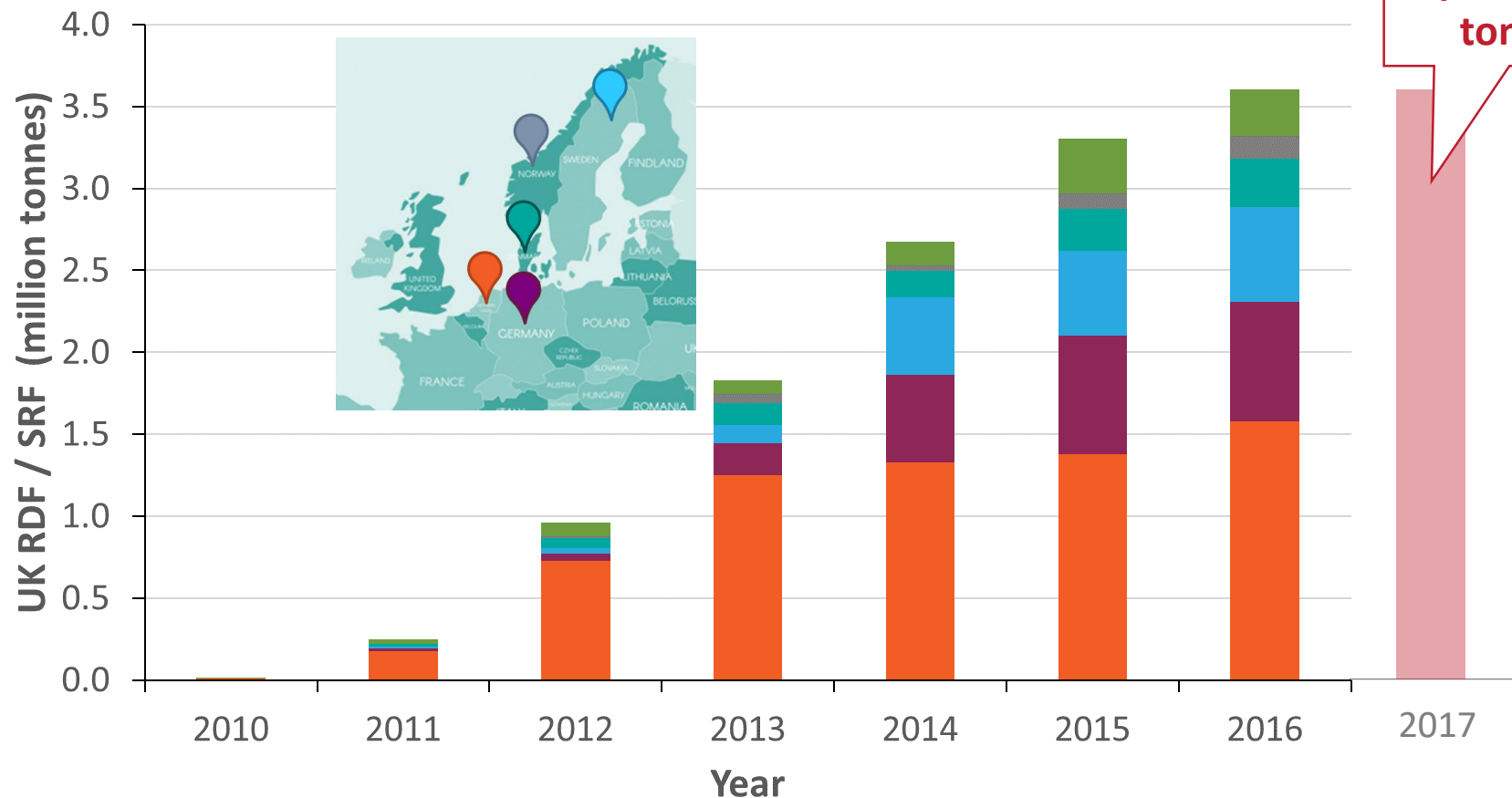


Market Development



Key Off-takers 2010-2016

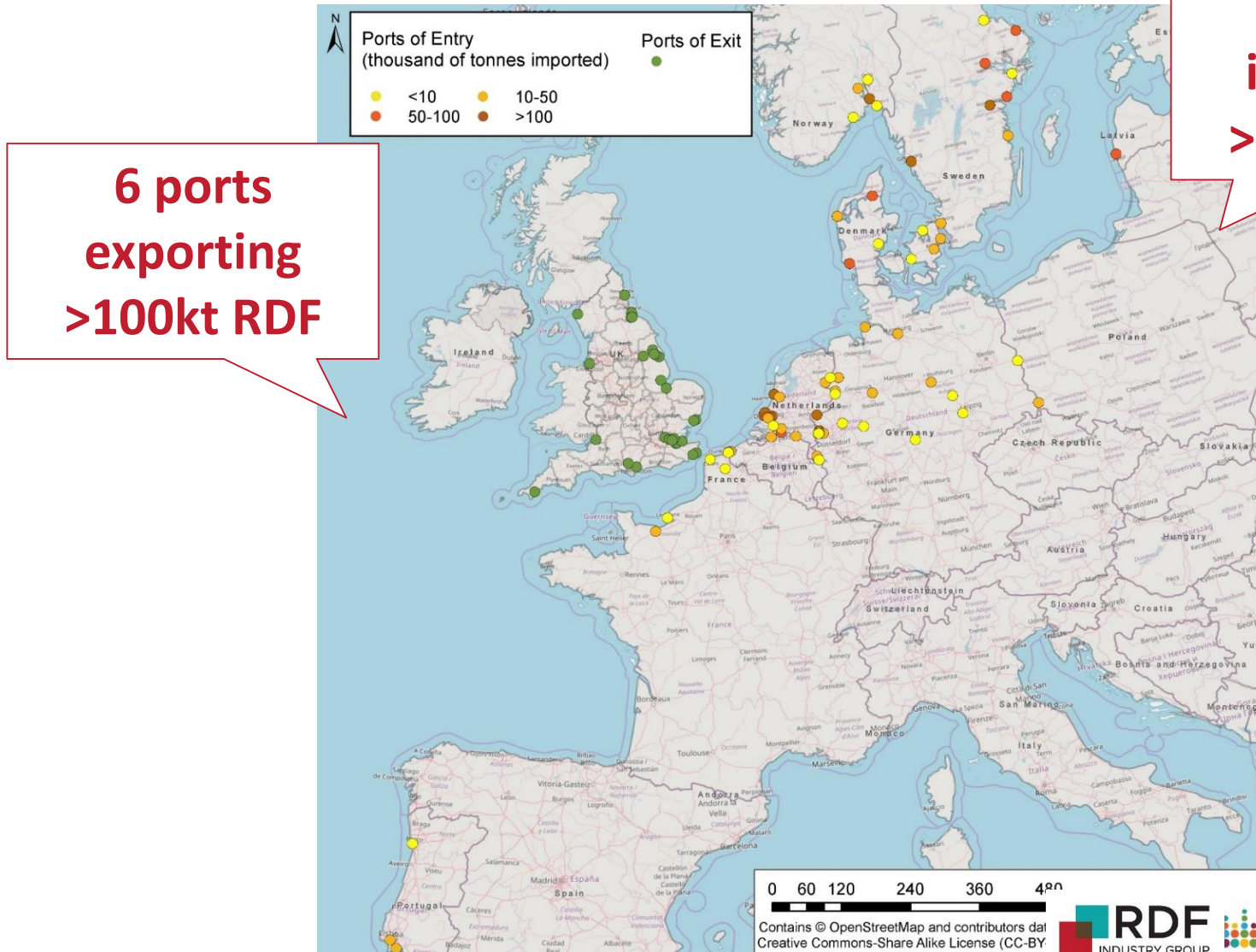
UK RDF / SRF imported by Country (mt)



■ Netherlands ■ Germany ■ Sweden ■ Denmark ■ Norway ■ Other

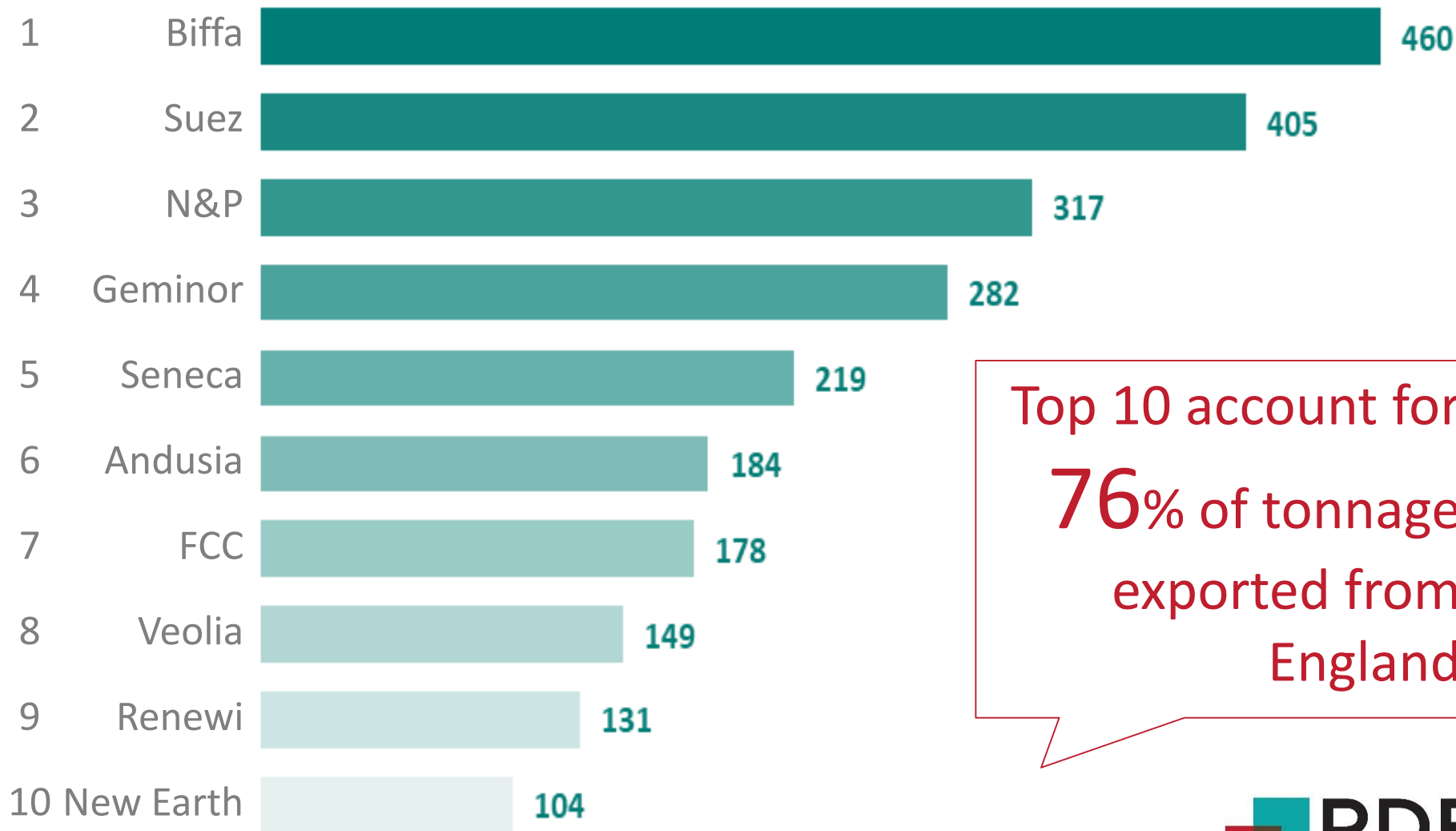
Ports of Exit and Entry

Ports of Entry, RDF imported from England, 2016



Key RDF Exporters in 2017

Top 10 exporters from England (kt)

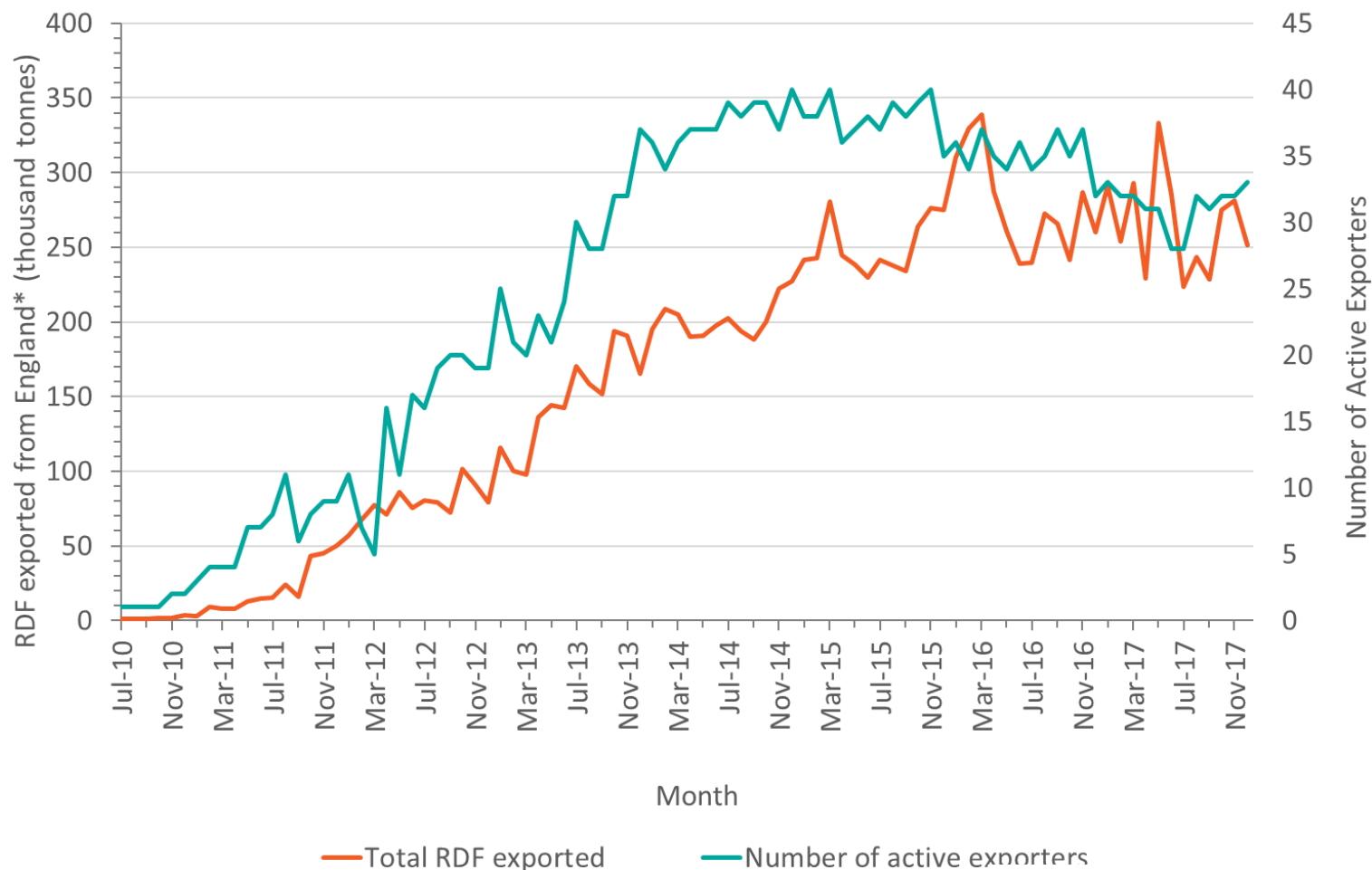


Top 10 account for
76% of tonnage
exported from
England

Source: Environment Agency, 2017 provisional figures

Market Consolidation 2010-2017

RDF Exported from England (kt) vs. Number of Notifiers



*2010-2014 includes exports from Wales

Market Outlook



Market Drivers



Future Policy Drivers



Legislation

- 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’

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
- European operators might 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



To Summarise...

- RDF Industry Group represents those involved in UK to Europe RDF logistics chain
- Code of Practice
- Rapid growth in exports since 2010, now maturing market is plateauing and consolidating
- RDF movements across Europe affected by supply and demand dynamics. CE package will impact these.
- Some uncertainty post-Brexit but framework for tariff and non-tariff boundaries remains
- Concern over possible port delays



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