

Waste Derived Fuels

New and Emerging Markets

RDF Conference
November 2021

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Secretariat

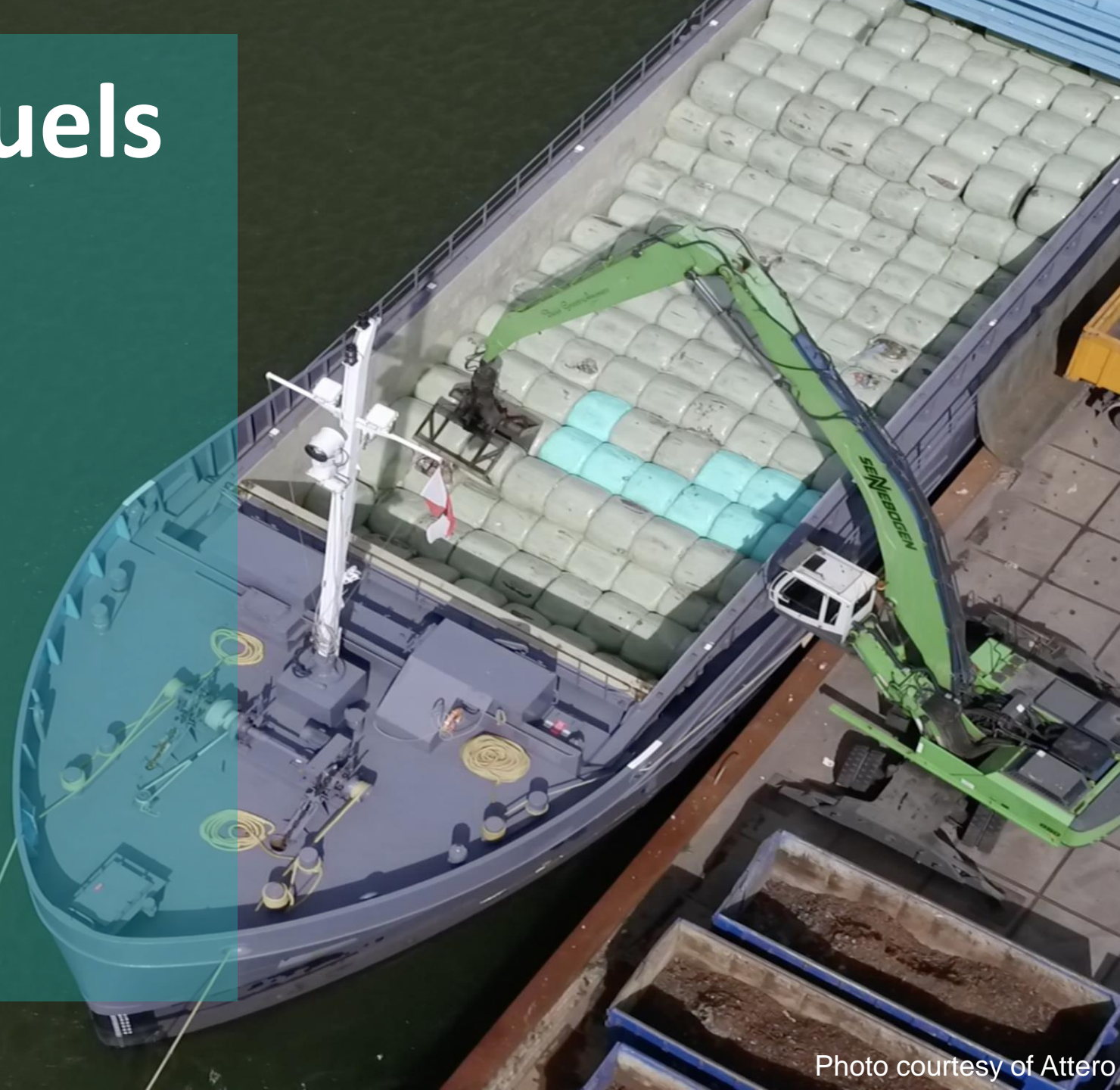


Photo courtesy of Attero

Agenda

- *Introduction to RDF Industry Group*
- *Introduction to New & Emerging Markets*
- *Selected Countries*
- *Summary*

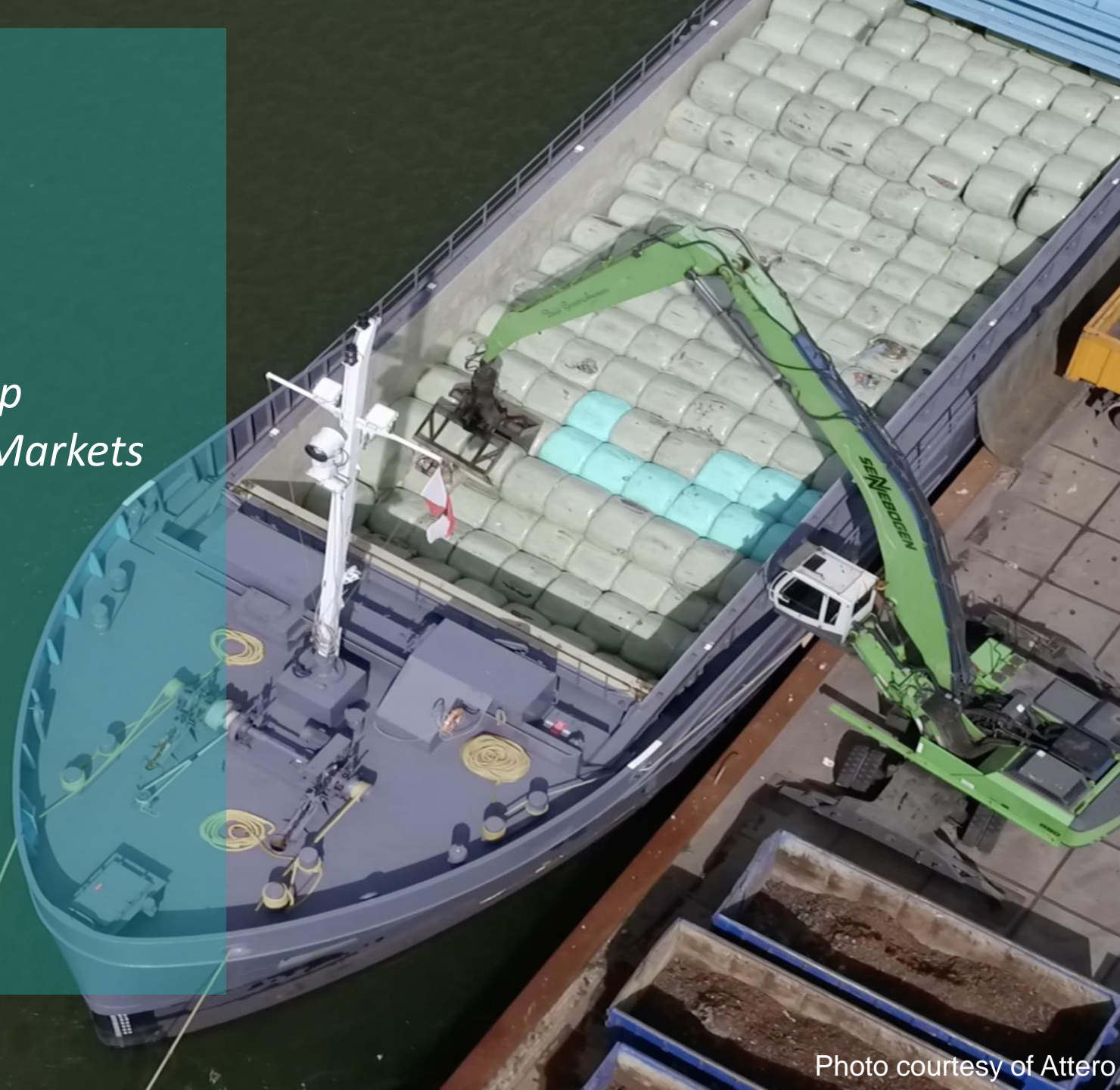
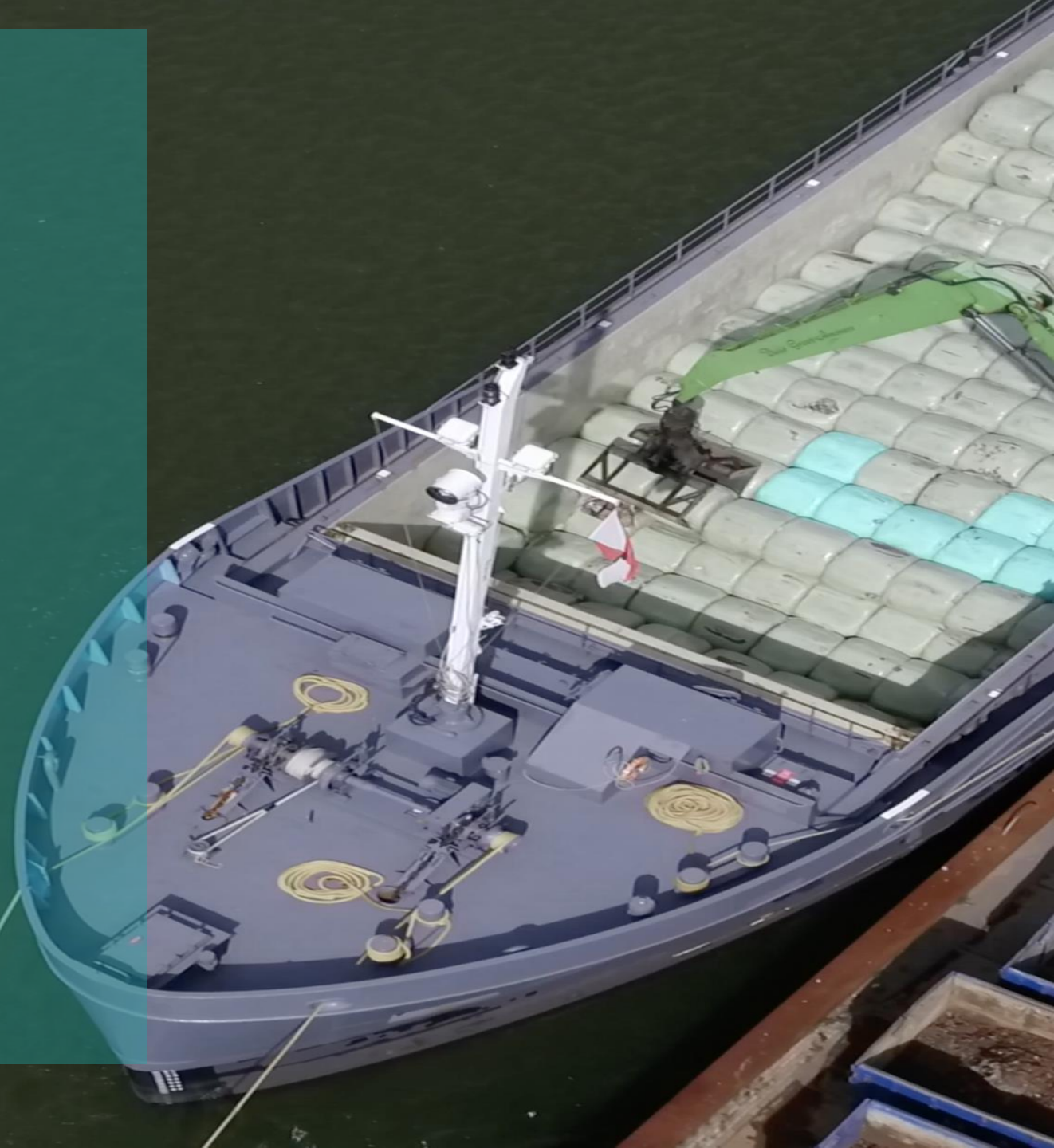


Photo courtesy of Attero

Introduction to the Group



Represents organisations:

- across the waste derived fuels (WDF) supply chain
- covering intra-European WDF flows

Aims to:

- work collectively to provide a platform to address issues faced by the sector and to explore new opportunities
- promote efficient utilisation of capacity across Europe

WASTE ARRIVES AT WASTE
TRANSFER STATION



PRE-TREATMENT OF WASTE



PREPARATION FOR TRANSPORT



STORAGE



TRANSPORTATION



LOADING



EXPORT



UNLOADING



TRANSPORTATION



FURTHER
PRE-TREATMENT



RECOVERY FACILITY



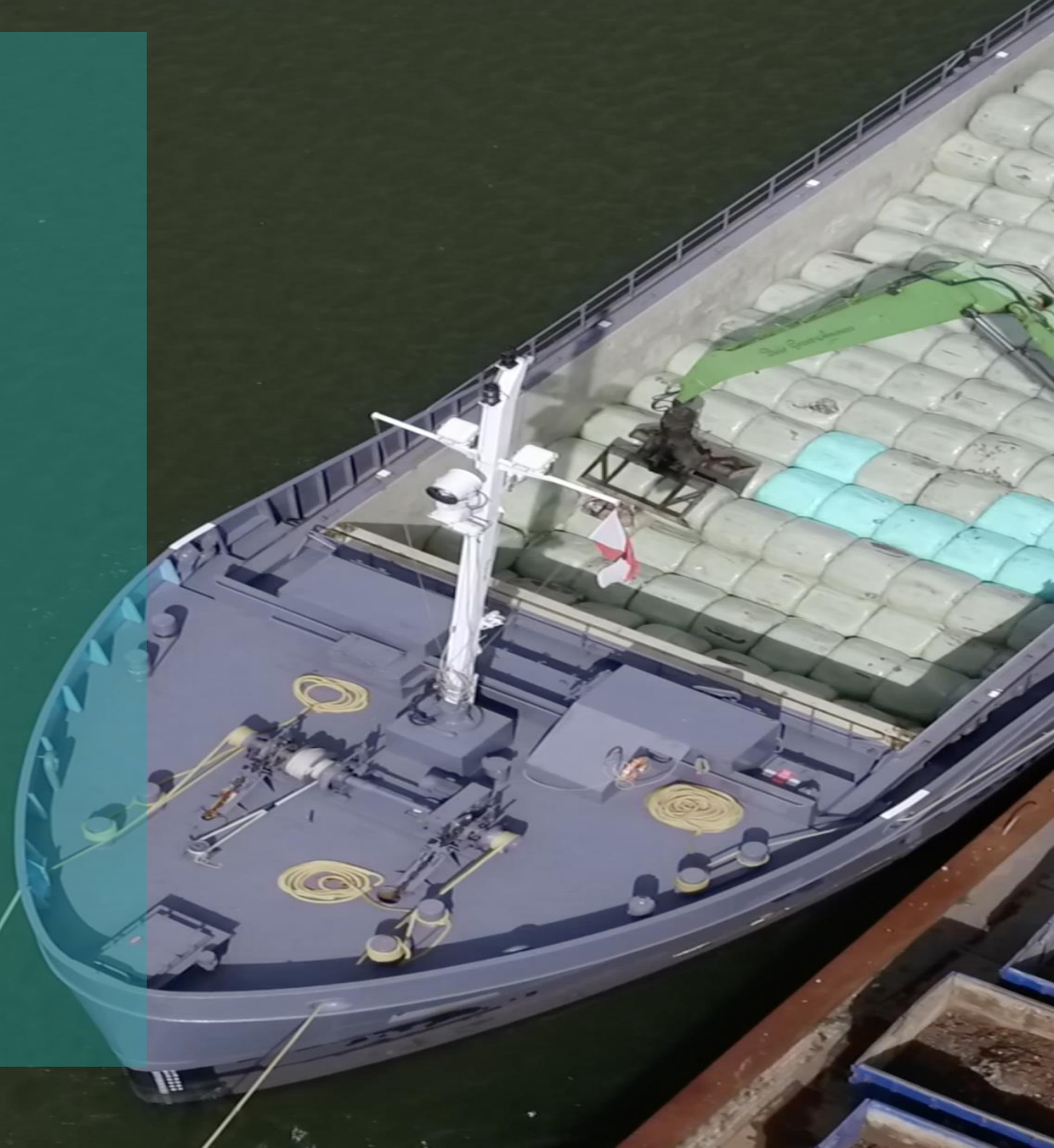


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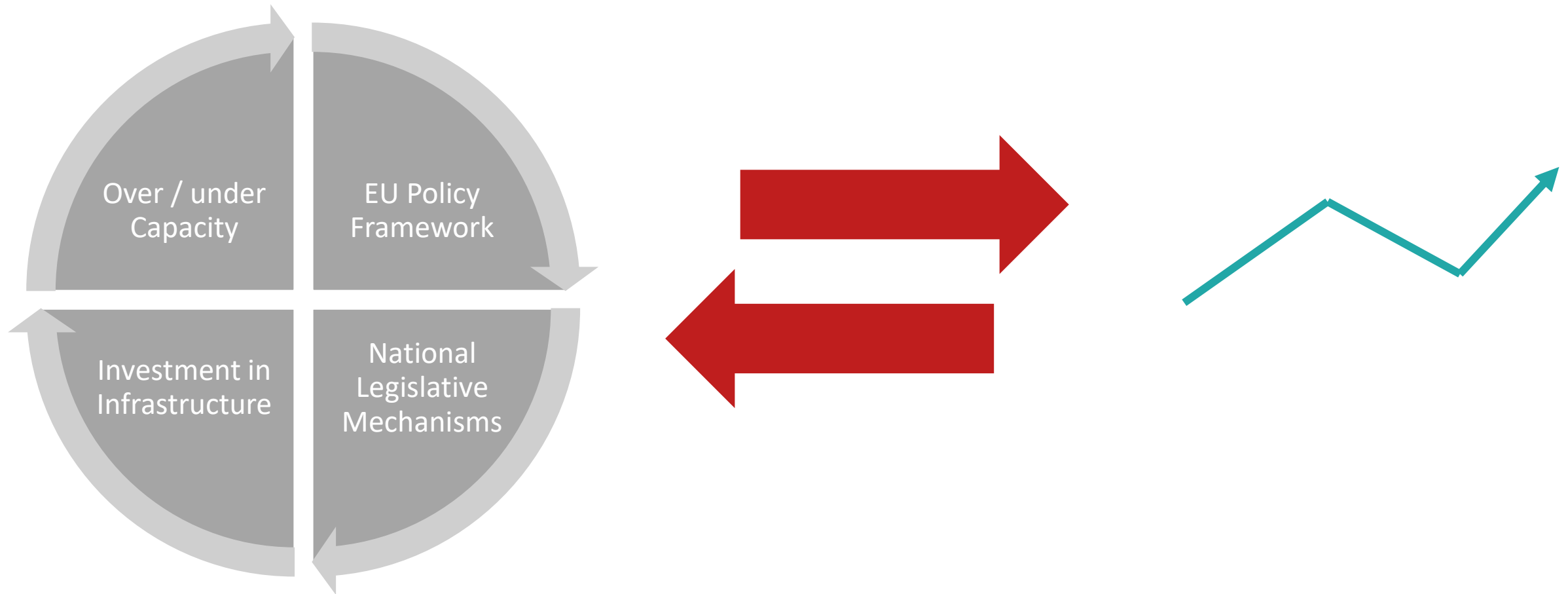


New and Emerging Markets

Why are they important?

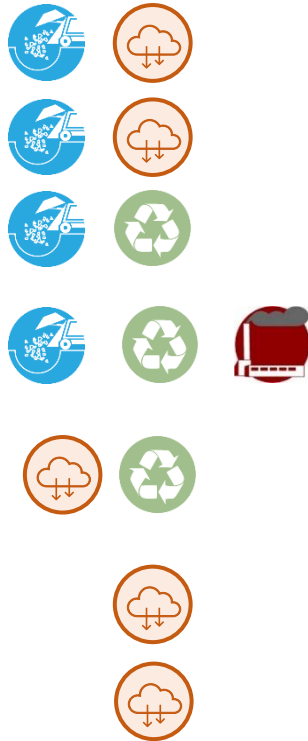


Dynamic Market



Policy Drivers

- UN Global Methane Assessment
- EU Methane Strategy
- EU Landfill Directive
- Circular Economy Action Plan and Proposed Amendment 104
- EU Green Deal and 'Fit for 55' Legislative Package
- EU Emissions Trading System
- EU Effort Sharing Regulation



Landfill diversion



Waste hierarchy/circular economy

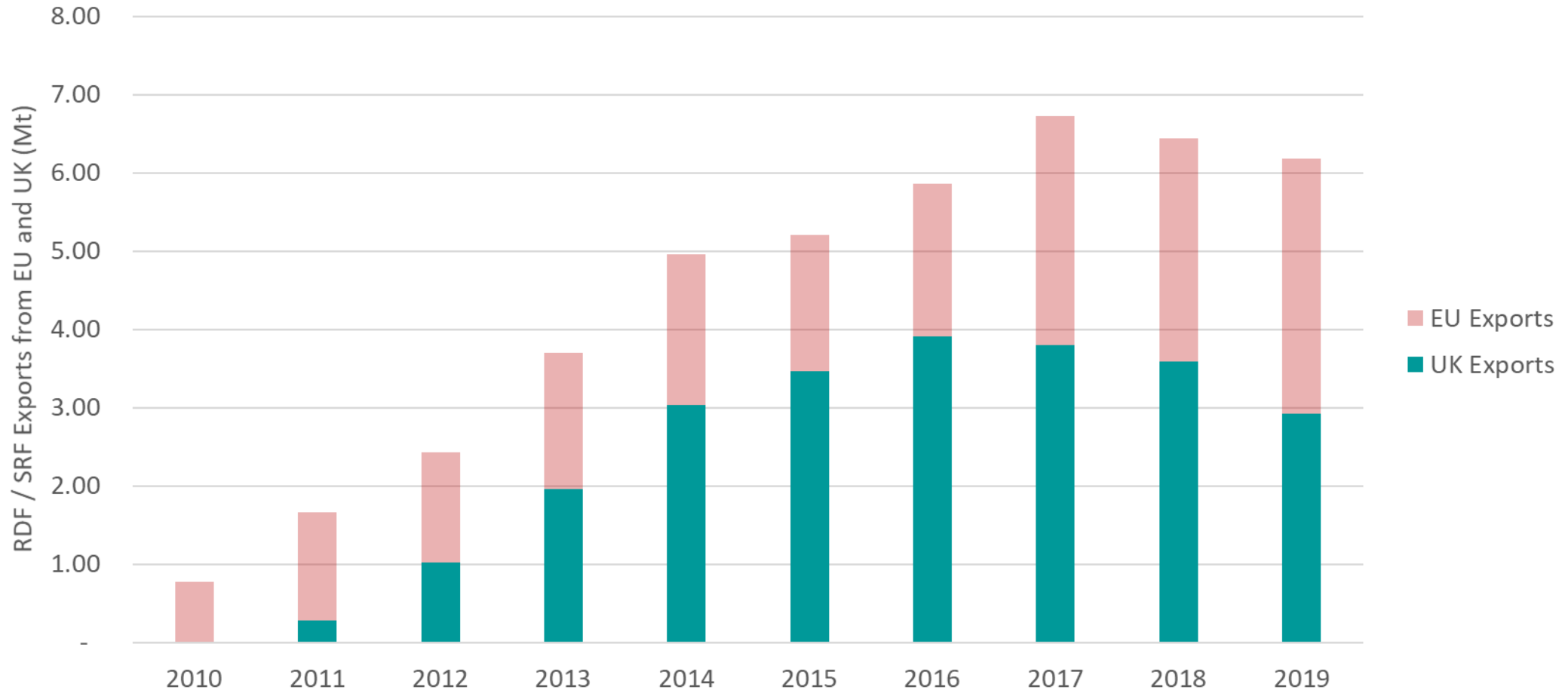


Efficient utilisation of recovery capacity



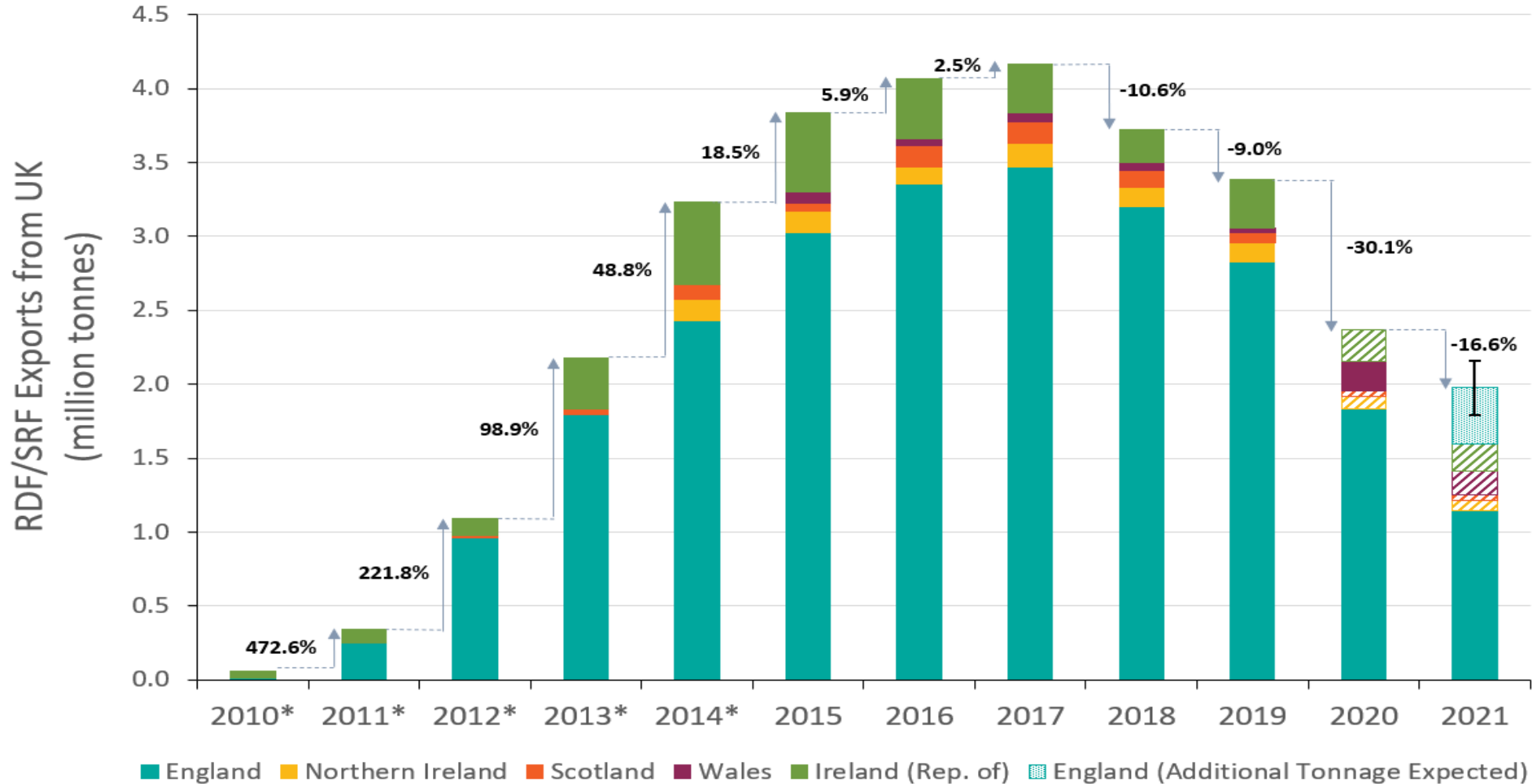
GHG emissions reduction

Role of UK Market



Source: Eurostat

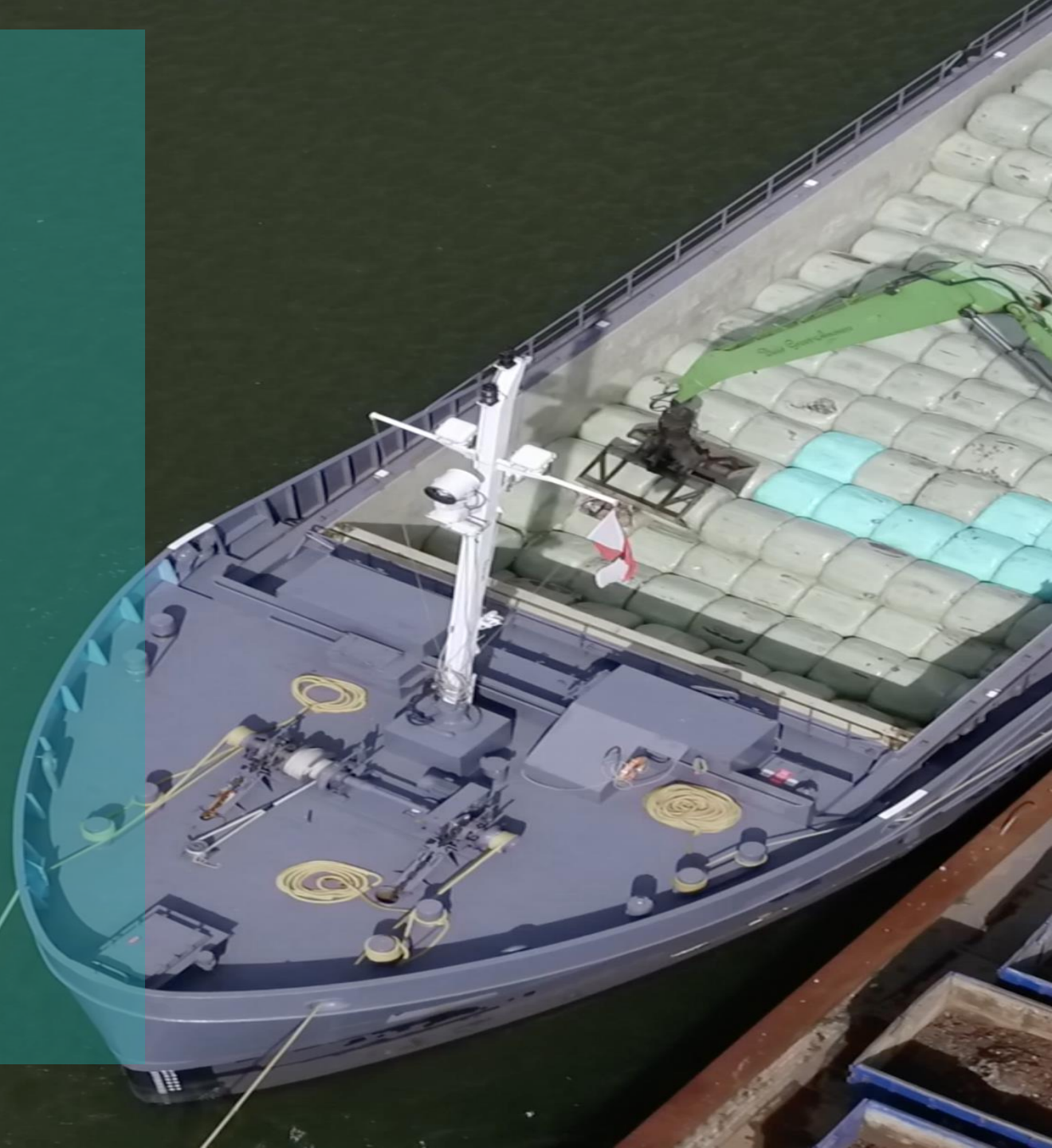
Market Dynamic



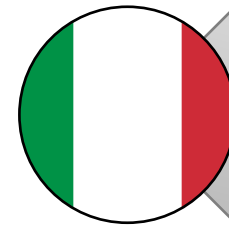
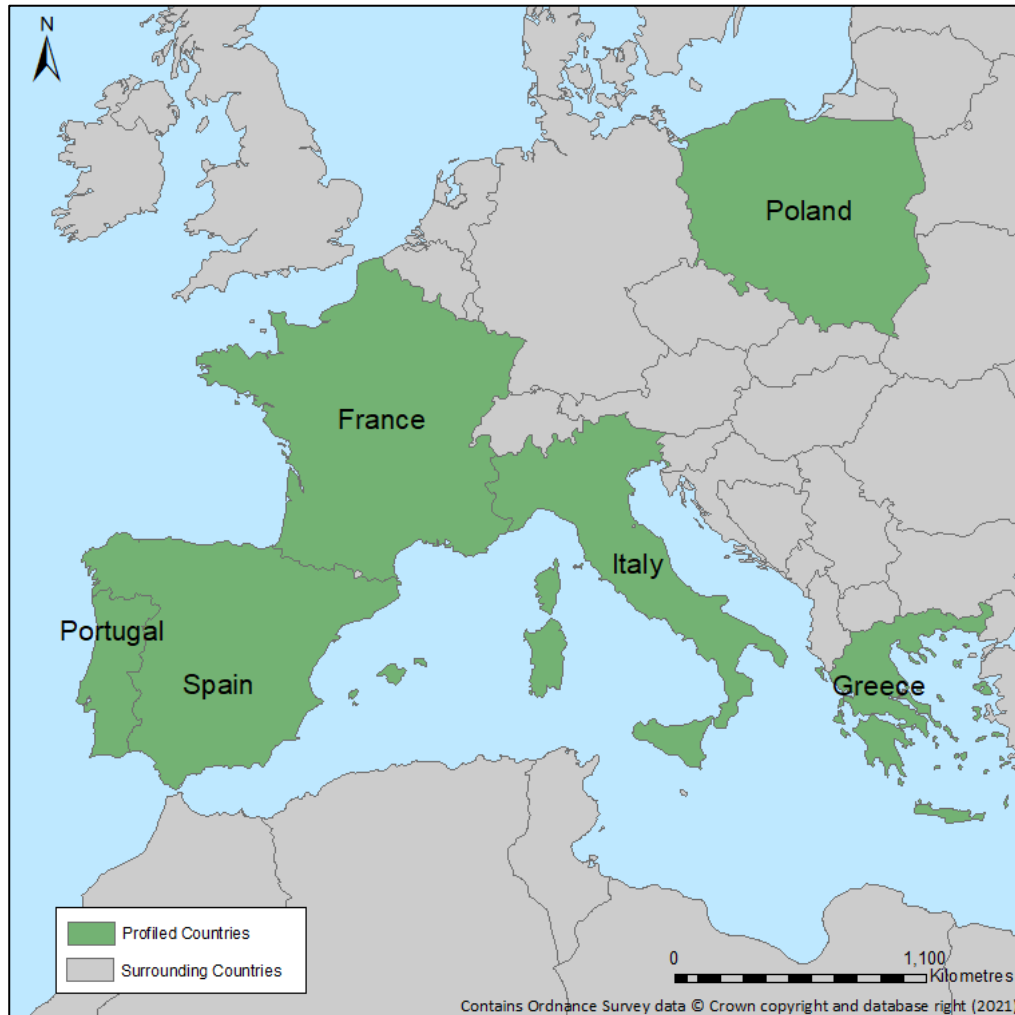
Hatched lines represent projections

Selected New & Emerging Markets

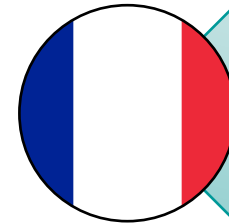
- *Italy*
- *France*
- *Greece*



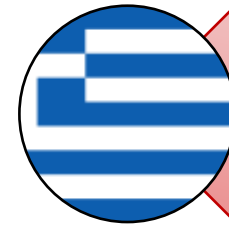
Selected Markets



Italy



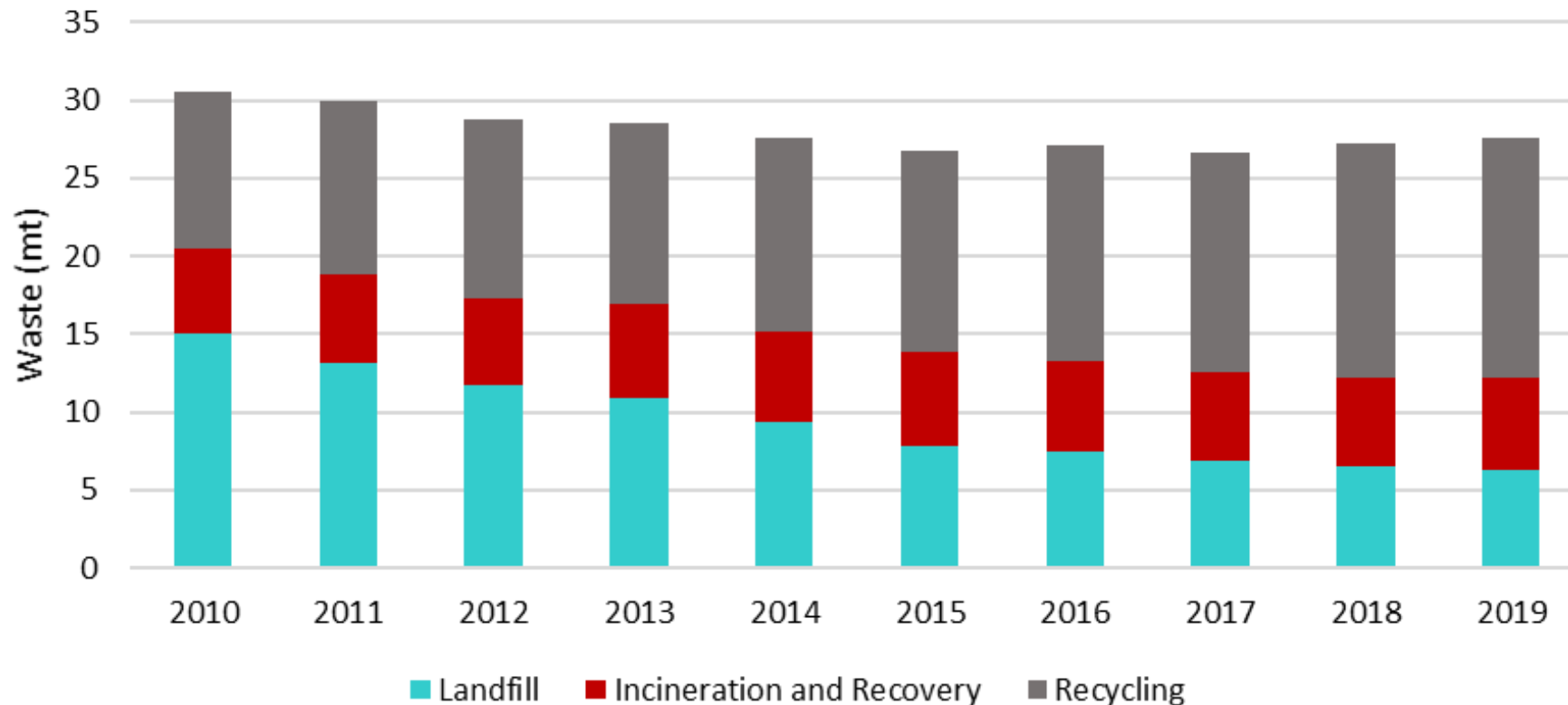
France



Greece

ITALY

Waste Generation and Management



48 EfW facilities, c. 7Mt

Tax Drivers



€5.20 - €25.80 / tonne

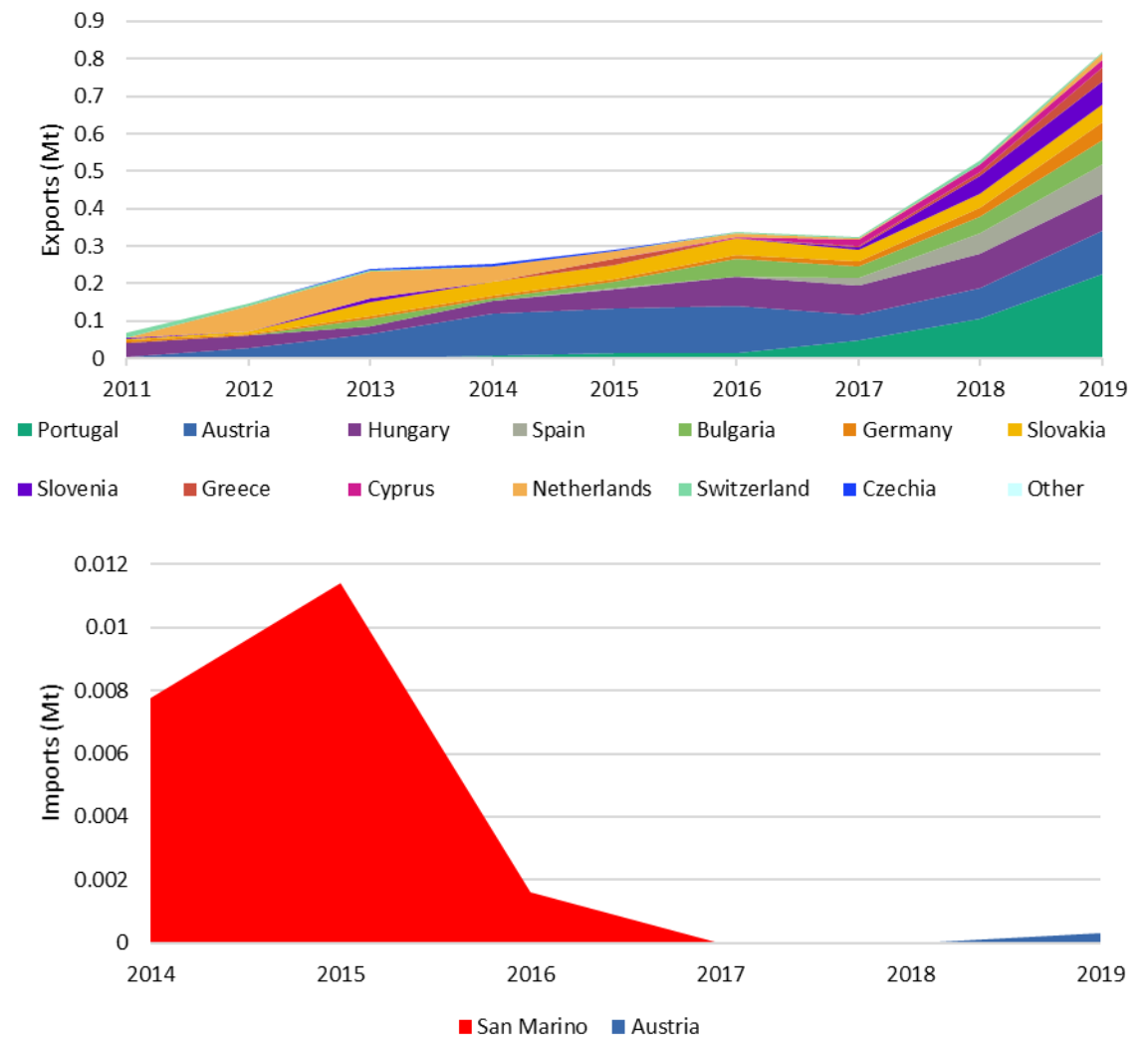
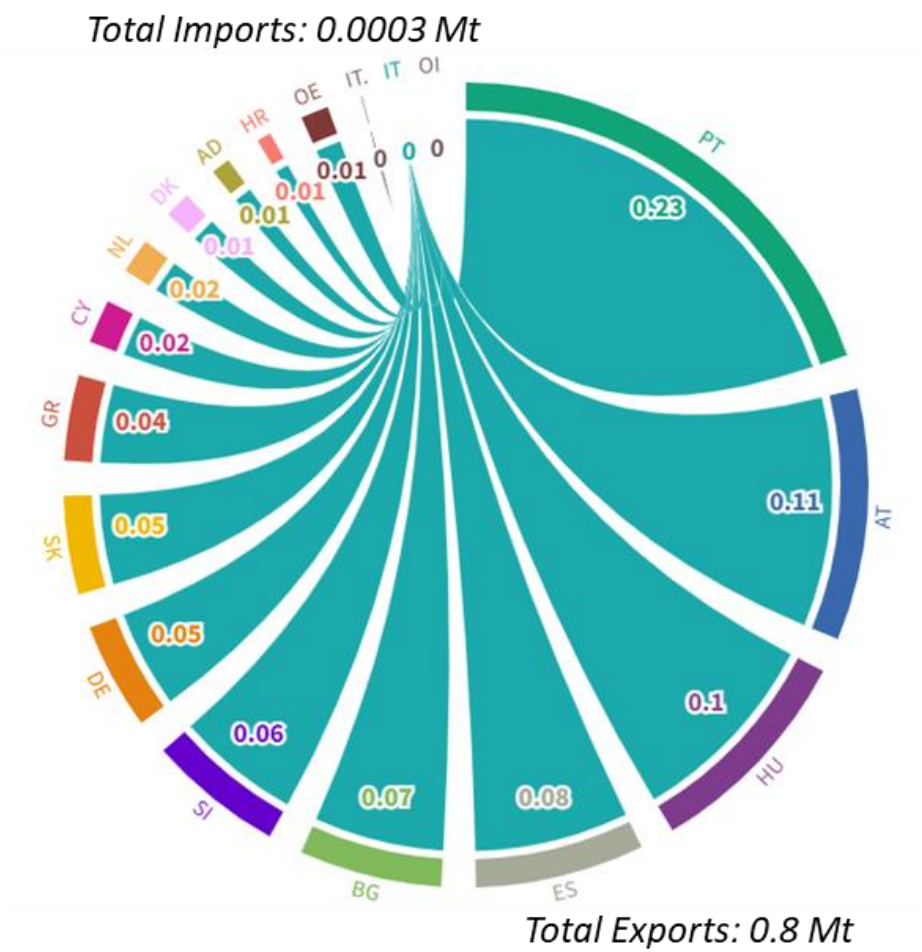


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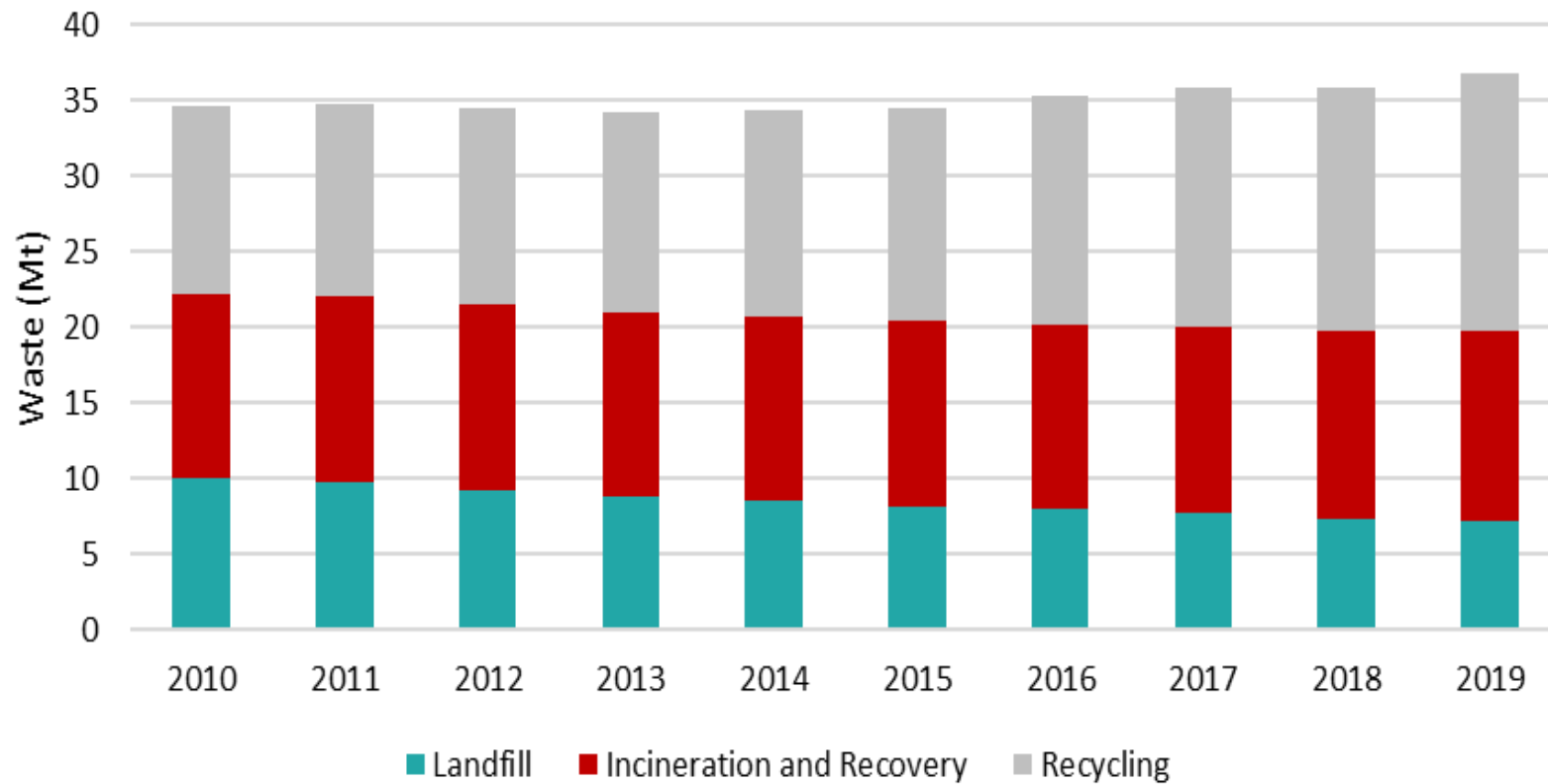
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Import and Export Trends



FRANCE

Waste Generation and Management



Source: Eurostat



118 EfW facilities, c. 15Mt

Tax Drivers



€30 - €152 / tonne



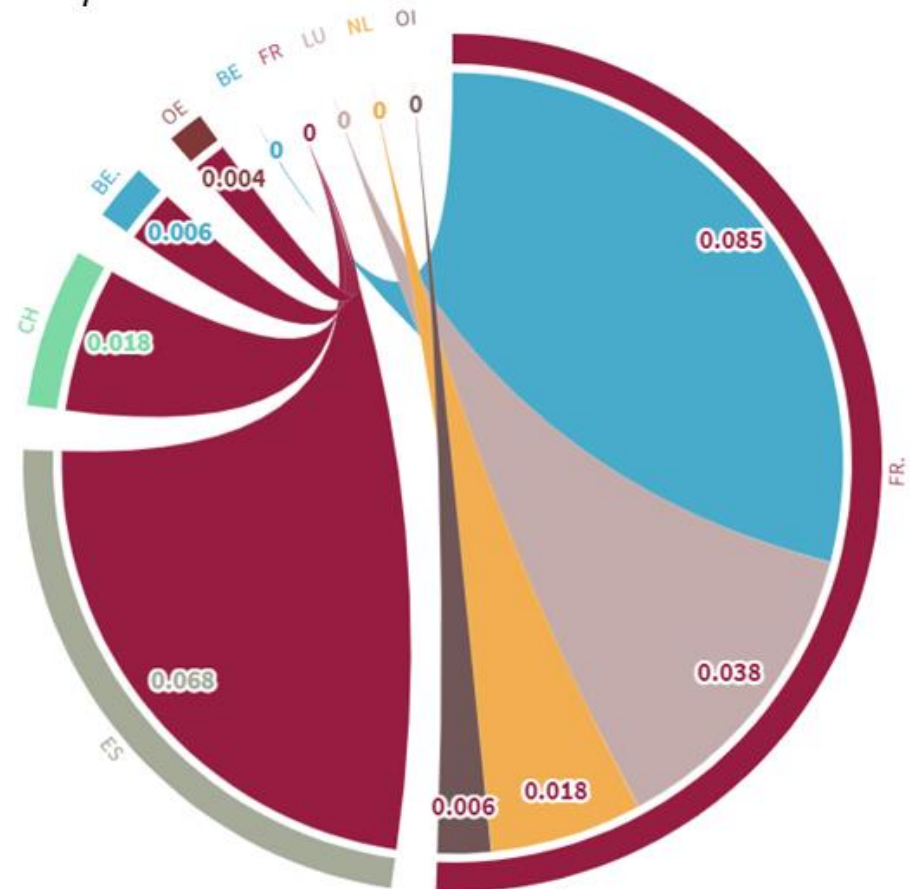
€3 - €12 / tonne



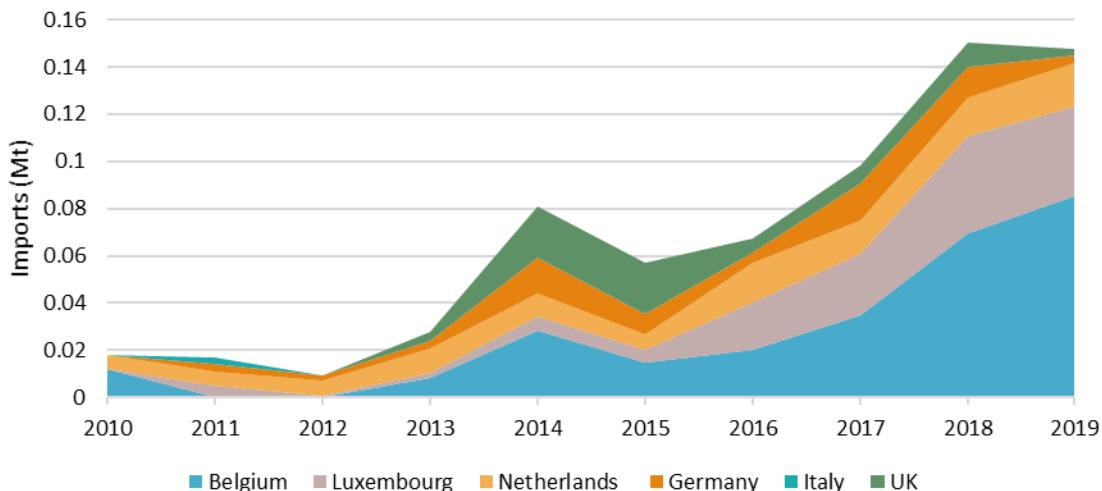
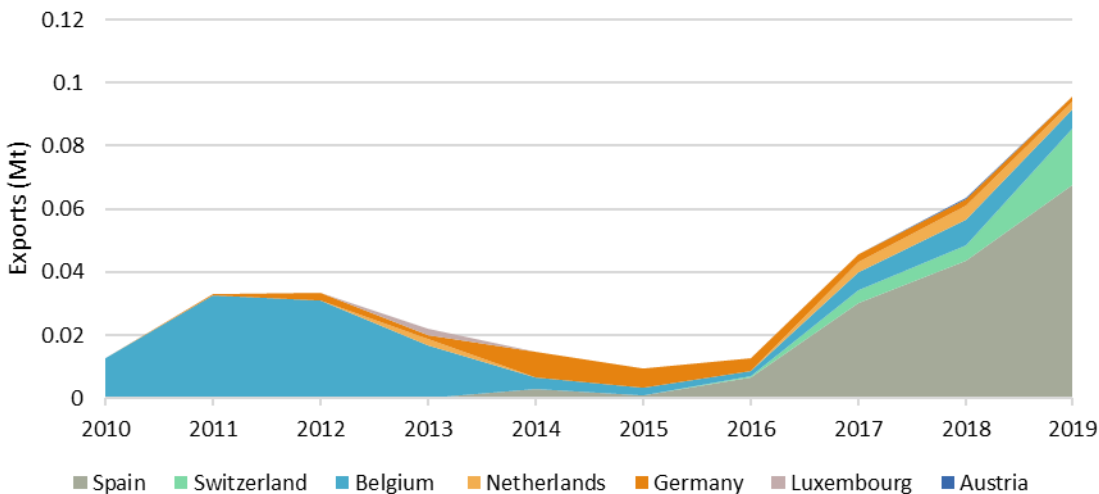
€44.81 / tonne of CO₂e.

Import and Export Trends

Total Exports: 0.09 Mt



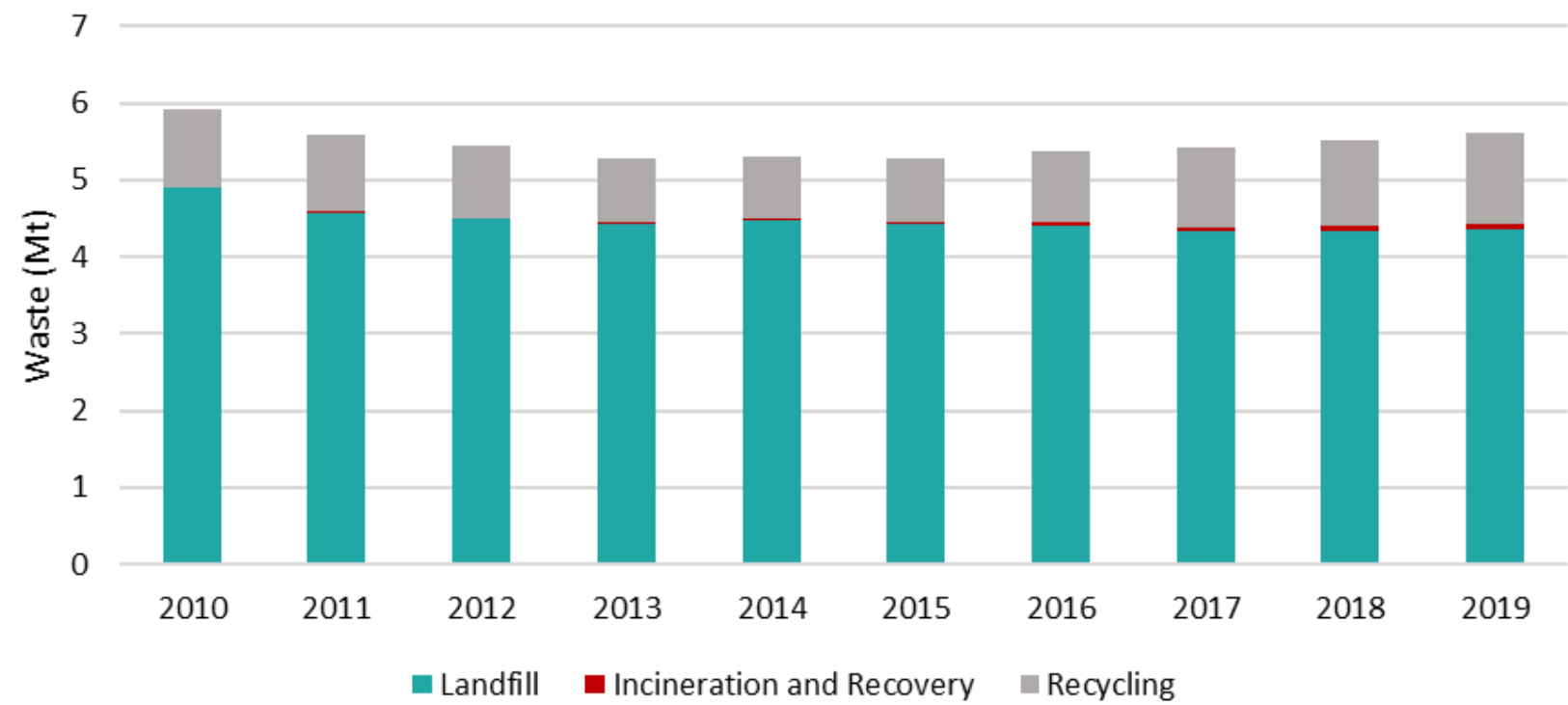
Total Imports: 0.15 Mt





GREECE

Waste Generation and Management



none

Tax Drivers



none

€20/ tonne (proposed
from 2022)

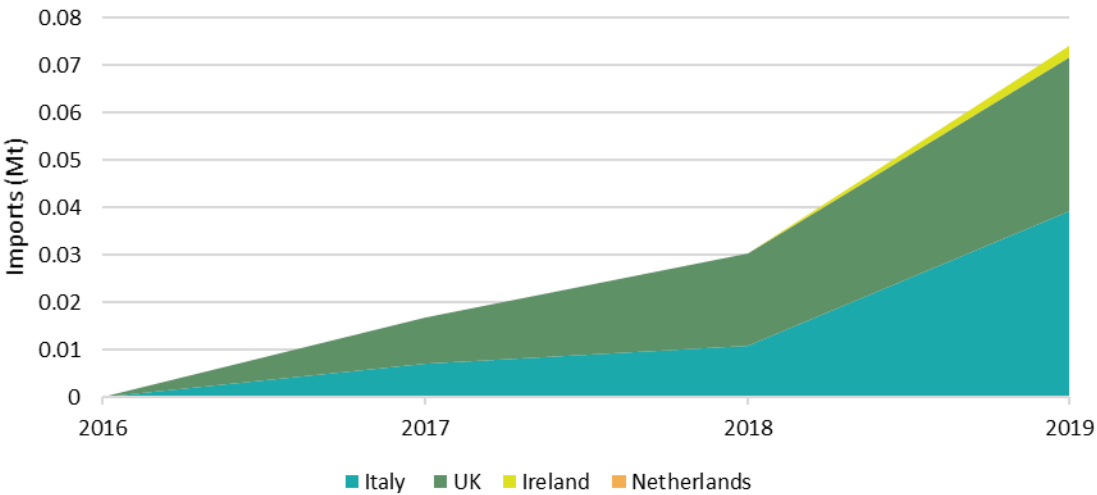
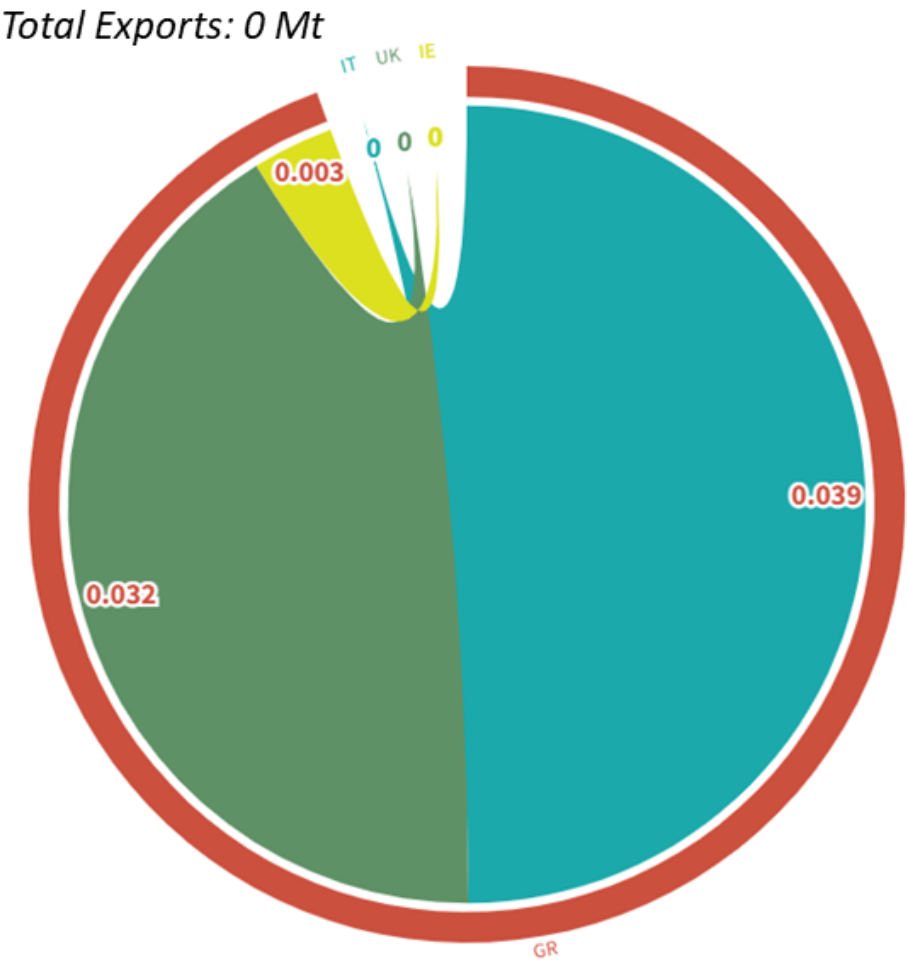


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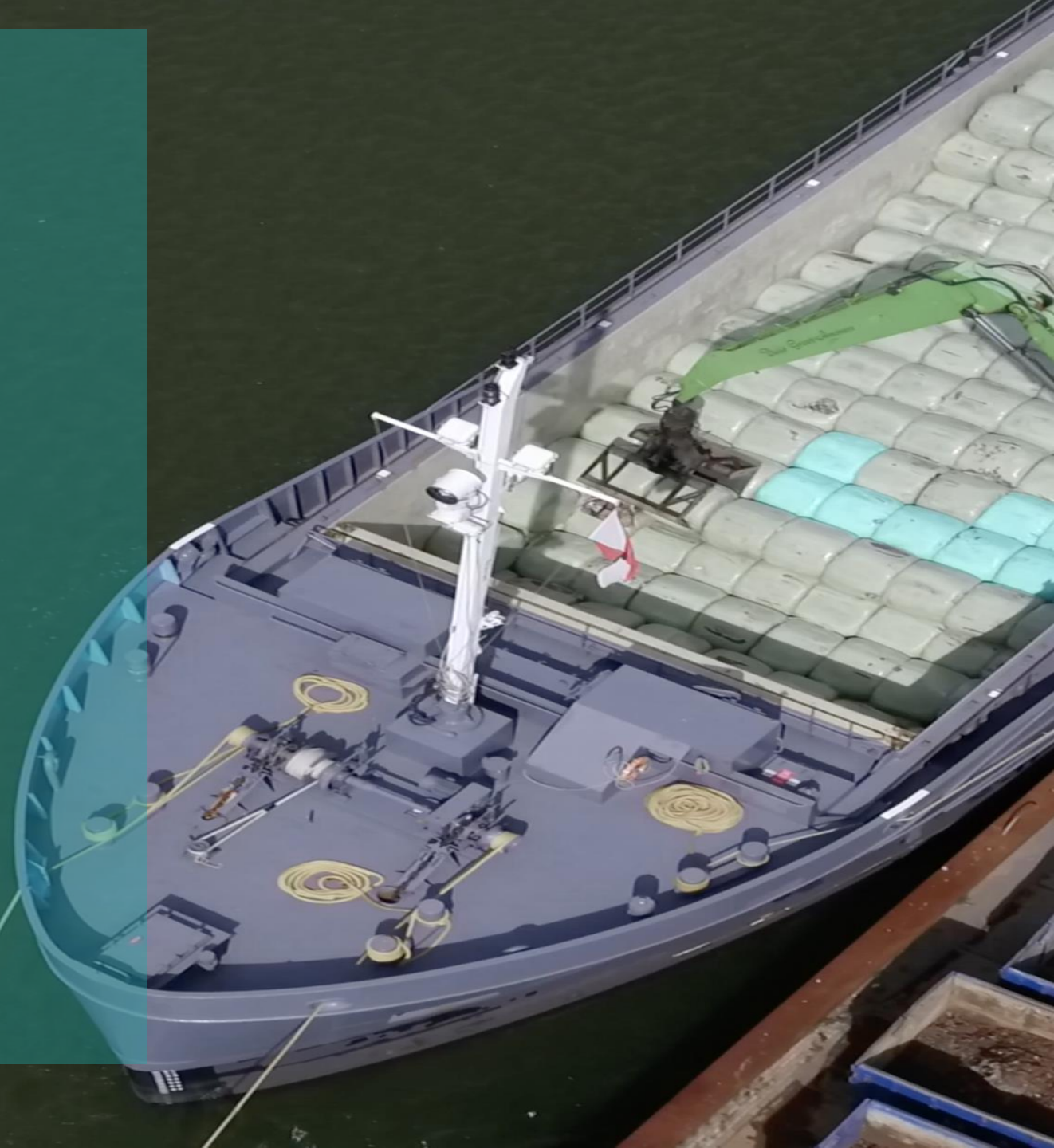


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Import and Export Trends



Summary



Summary

- Overarching push-pull factors driven largely by policy and national application
- Decline in dominant UK export market
- Operators in traditional off-take nations looking to explore new and emerging markets
- Report explores five different markets, three highlighted here

Summary



Italy

- Large market
- Requirement to reduce landfill
- Challenges to new infrastructure development
- Landfill tax - variable
- Increasing exports
- Immediate opportunities



France

- Large market
- Landfill declining but incineration remaining stable
- Requirement to reduce landfill and taxes (although variable)
- Exports and imports demonstrated connectivity
- Potential opportunities



Greece

- Smaller market, but significant landfill
- No current landfill tax
- Proposed tax but some challenges
- No domestic infrastructure
- Development of domestic infrastructure will take time
- Potential opportunities in medium term

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