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Waste-to-Energy Industry Barometer 2026: Favorable Conditions, Rising Costs

The business climate in the waste-to-energy sector is expected to continue to be rated significantly higher in 2026 than that of the economy as a whole. Rising prices are a particular cause for concern. The annual industry barometer published by ecoprog, with support from CEWEP, documents the current situation and the industry's expectations.

Sentiment in the WtE industry remains high despite ongoing economic challenges in Europe. In this year's survey of the WtE industry, the WtE industry's business climate index rose slightly to 99.8 points. This marks the third consecutive increase; according to the Ifo Institute's methodology, sentiment in the WtE sector thus remains in the "boom" range. However, the sector is still somewhat removed from the even more positive assessments seen from 2017 through 2021.

The operators' findings also support ecoprog's market assessment. Despite waste volumes that remain below average in some cases due to weak economic conditions, the waste treatment situation for non-recyclable waste in Europe remains tense. There are two main reasons for this:

- On the one hand, the demand for waste fuels has declined in many European countries in tandem with the volume of waste. This is particularly true for the cement industry, which—alongside WtE facilities—is the largest user of waste for thermal recovery in Europe. However, since cement production in many countries remains well below the high levels seen in the years leading up to 2020, the cement industry's demand for waste fuels is also subdued.
- Across Europe, there is insufficient capacity for thermal waste treatment. Waste is flowing—primarily from the United Kingdom and Italy, but also from smaller markets such as Poland, Slovenia, and Croatia—to countries like Sweden, the Netherlands, Germany, and Denmark for pretreatment or direct thermal recovery. The reason for this is a decline in landfill capacity (Italy) as well as landfill bans or high landfill taxes (United Kingdom). In neighboring countries such as Austria, waste—for example, from Italy—is, in some cases, even displacing a portion of domestic waste from commercial sources due to high price levels.

In the WtE industry, however, sentiment has deteriorated slightly compared to the previous year, from 101 to 100 points. Nevertheless, the current business situation and business expectations remain well above those of the overall economy. By way of comparison: Using the same methodology, the ifo Business Climate Index stood at 90 points in October 2026.

One of the most critical issues in this year's survey is price trends. Last year, 46% of companies in the industry already expected rising prices; this year, that figure rose to nearly two-thirds. This naturally reflects the events of the past few months, particularly in the wake of rising oil prices. In addition, what is likely the WtE sector's greatest dilemma in Europe is becoming apparent: the construction of additional capacity is becoming increasingly urgent as a result of pressure on landfilling; at the same time, this expansion is becoming increasingly expensive due to external conditions.

Rising costs are also the operators' biggest concern—though not technical costs, but rather CO2 costs. This has naturally been the case especially since the European Commission's July 2026 proposal to gradually and fully integrate WtE into the European CO2 trading system (EU ETS) by 2034—while landfill remains excluded, despite high methane emissions.

The Waste-to-Energy Industry Barometer has been conducted annually since 2012 by the Cologne-based consulting firm ecoprog. CEWEP (Confederation of European Waste-to-Energy Plants), the European umbrella organization for operators of thermal waste-to-energy plants, supports the survey. For each valid response, ecoprog donates 10 euros to SOS Kinderdorf e. V.

The Waste-to-Energy 2026 Industry Barometer is available as a free download on the CEWEP website in German and English.