

New flue gas cleaning system at ZMS Schwandorf, courtesy of Andritz AG.

Industry Barometer Waste-to-Energy 2026

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Statement from CEWEP

At CEWEP, we are pleased that Waste-to-Energy (WtE) plant operators in Europe continue to perform well economically. The business situation is positive and capacity utilisation is high.

Costs will rise

As in the previous year, around half of the WtE operators expect gate fees to increase in the future. As in other sectors, the sharp rise in the price of crude oil, including all the resulting indirect cost increases, is also affecting the WtE sector.

However, the cost increase is expected above all as a result of the inclusion of the WtE sector in the EU ETS, proposed by the European Commission in July 2026 and currently being discussed in the European Parliament and the Council of the EU.

Ultimately, this will mainly affect citizens and businesses in the EU. Rising costs resulting from carbon pricing will be passed on to those delivering the waste. Given the costs that have already increased, WtE operators have hardly any other choice.

On the one hand, those delivering the waste are municipalities, which will compensate for the rising WtE costs by increasing waste fees. For municipal waste, it is therefore citizens who will pay these additional costs.

On the other hand, those delivering the waste are private waste management companies, whose waste, usually pre-treated, comes from commercial sources. These commercial customers will also have to pay more for the treatment of their waste in the future, which will weigh on them in international competition.

Whether the inclusion of WtE in the EU Emissions Trading System will lead to significant CO_2 emission reductions remains to be seen, as WtE operators have only limited influence, at least as long as there is no business case for CCUS. The power to reduce fossil CO_2 emissions from residual waste actually lies with those who place fossil-based products on the market that are not recycled.

An efficient EU emissions trading system for the waste sector can only succeed if it addresses the causes of fossil emissions from residual waste. At the same time, an overall increase in greenhouse gas emissions must be prevented, in particular methane emissions from landfills, should landfilling become economically more attractive than carbon-priced WtE plants.

The upcoming EU Circular Economy Act must set the right course here and ensure that waste is not diverted to landfills.

This is no minor issue: 8 EU Member States still landfill 50% or more of their municipal waste, which in total still amounts to almost 50 million tonnes in the EU.
What is needed here is a smart and well-coordinated waste and climate policy.

Is current EU policy setting the right course? Or is it even hindering the shift away from landfilling that the EU waste hierarchy actually requires: towards recycling, but also, for non-recyclable waste, towards energy recovery?

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For example, through the EU Taxonomy Regulation ((EU) 2020/852), which does not list investments in WtE as sustainable and thus makes it difficult to secure financing for WtE projects, and through the exclusion of WtE projects from funds like, for example, for regional development.

WtE capacities in Europe: Too much? Too little? Enough?

The measures mentioned above stem from a deep-rooted fear of WtE overcapacity, which should of course be avoided. But is this fear justified? To assess this, one would need to take a factual look at the WtE capacity actually available in the EU.

However, the European Commission and Eurostat are not helping to collect reliable data. Eurostat collects data on the theoretical capacity for energy recovery (R1 plants), while EU waste targets and statements on capacity often refer to municipal waste and its treatment in dedicated waste incineration plants.

Eurostat's data collection on energy recovery capacity also includes co-incineration capacity in cement and steel plants, in waste wood incineration plants and in anaerobic digestion plants. It records the *theoretically* available capacity. The fact that industrial plants such as cement kilns accept waste depending on their business situation, i.e. they accept less waste when demand for cement is low in difficult economic times, plays no role in this type of data collection. Routine maintenance shutdowns at WtE plants are not taken into account either. Nevertheless, some conclude from these data that there is enormous WtE overcapacity in Europe. It is true that some (few) Member States have more capacity than residual municipal waste and therefore import waste. At European level, however, we are far from overcapacity, especially considering that 21% of all municipal waste generated in the EU in 2024 is still landfilled.

The EU Landfill Directive requires that landfilling of municipal waste must be limited to 10% by 2035. Even assuming that a (hopefully large) share of the municipal waste currently landfilled will be recycled in the future, which CEWEP explicitly supports, investments in WtE plants for the non-recyclable waste will be needed in some Member States to achieve this target.

Furthermore, it must also be taken into account that Europe's WtE fleet is ageing. According to this year's industry barometer, almost 60% of plant operators want or need to renew or modernise their plants in the coming years. Most operators expect the capacity of their plants not to change significantly though.

CEWEP offers the European Commission and Eurostat its support for appropriate data collection, which would enable a sound assessment of the WtE capacity needed and is essential for appropriate EU policy.

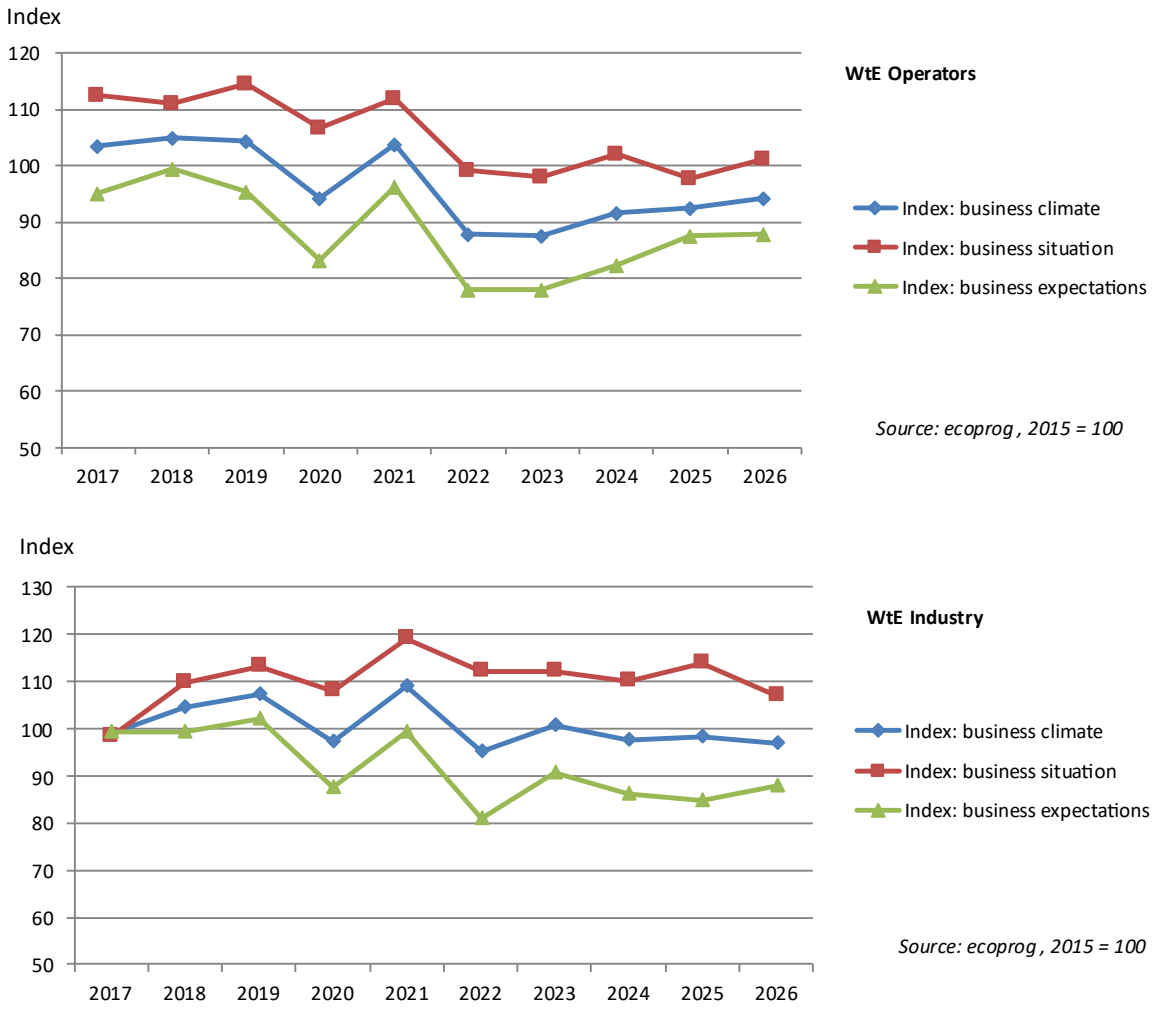
CEWEP (Confederation of European Waste-to-Energy Plants) supported ecoprog's Waste-to-Energy Industry Barometer survey again in 2026 and, as in previous years, encouraged its members to participate.

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WtE Industry Barometer: Positive Sentiment, Rising Costs

Sentiment in the WtE industry remains high despite ongoing economic challenges in Europe. In this year's survey of the WtE industry, the WtE business climate index rose slightly to 99.8 points (2025: 99.3 points). This marks the third consecutive increase; according to the Ifo Institute's methodology, sentiment in the WtE sector thus remains in "boom" territory. However, the sector is still somewhat removed from the even more positive assessments seen from 2017 through 2021.

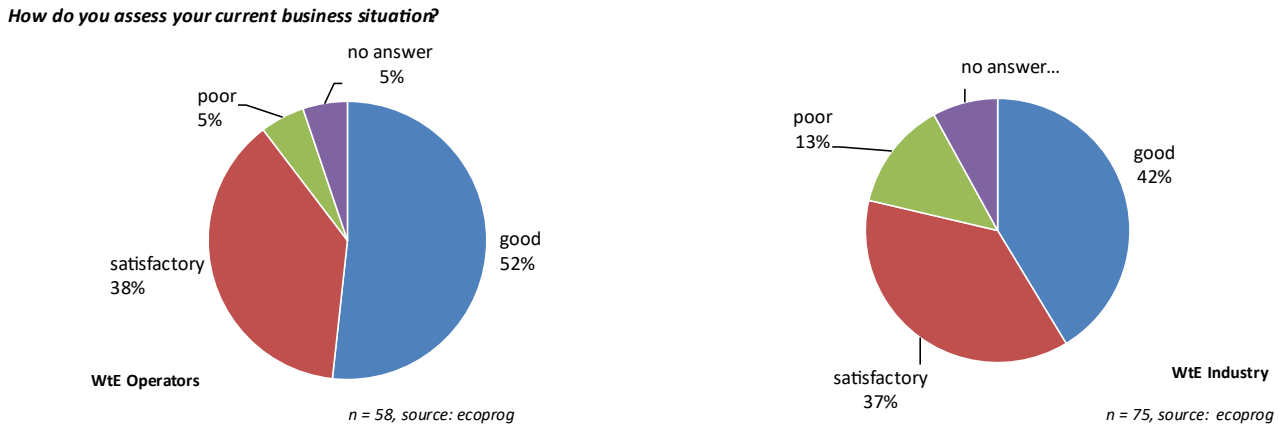
Fig. 1: Trends in the Business Climate Among WtE Operators and in the WtE Industry



Among operators of WtE plants, the current business situation in particular is once again viewed more positively than a year ago (94.9 points instead of 91.5). Business expectations remained at a similar level. 91% of plant operators report sufficient or relatively high capacity utilization, a figure identical to that of the previous year. 90% report that demand has neither changed nor improved over the past 12 months; this figure is also comparable to that of the previous year. Only when it comes to the capacity utilization of their plants do "just" 86% of operators state that it has remained the same or even improved compared to the previous year.

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Fig. 2: Business Conditions Among Operators and in the Industry



The operators' results also support ecoprog's assessment of the market. Despite waste volumes that in some cases remain below average due to weak economic conditions, the waste disposal situation for non-recyclable waste in Europe remains tense. There are two main reasons for this:[1]:

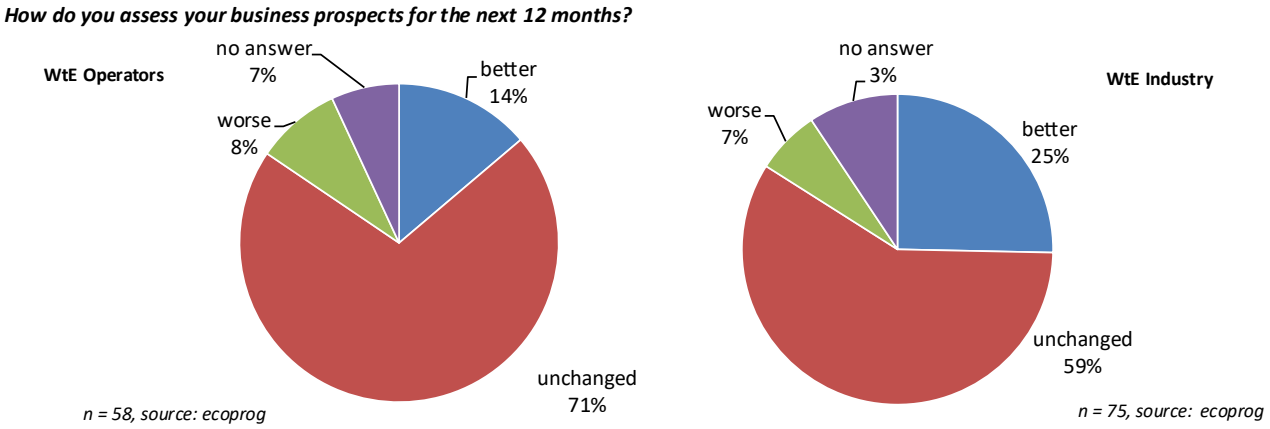
- On the one hand, demand for waste fuels has declined in many European countries in tandem with the volume of waste. This is particularly true for the cement industry, which—alongside TAB facilities—is the largest user of waste for thermal recovery in Europe. However, since cement production in many 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. The decline in sentiment is primarily due to the current business situation (99 points, down 6 from the previous year). Only 60% of industrial companies now describe their order backlog as sufficient or even relatively large; compared to 85% the previous year. Demand has improved only marginally compared to the previous year. 25% of companies report lower demand, while 28% report higher demand. For nearly as many companies, the order backlog has either increased (25%) or decreased (24%).

[1] These and other insights in this text reflect solely the views of ecoprog.

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Fig. 3: Business Outlook Among Operators and in the Industry



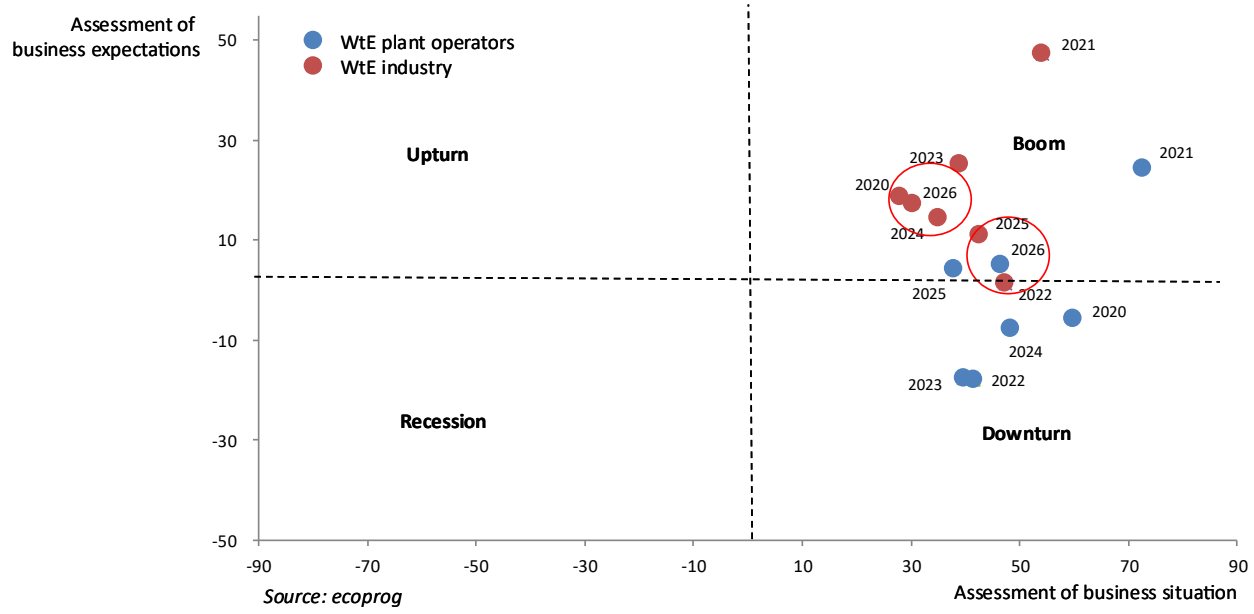
This (mild) criticism of the current business climate is surprising given the large number of new construction projects in the European market. At the same time, the number of renovation projects is on the rise in established markets such as Germany and France. From ecoprog's perspective, there is also a certain degree of dissatisfaction with the implementation of known and announced projects, partly due to unrealistic (or outdated) price expectations on the part of project developers. For example, in countries like Poland, some bids have recently gone unawarded because an insufficient number of qualified proposals were submitted.

An improvement is anticipated here in the future. This is reflected in business expectations, which, at 100 points, are rated slightly more positively than in the previous year (97).

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. Of course, this reflects the events of the past few months, particularly in the wake of rising oil prices. In addition, what is likely the WtE industry'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.

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Fig. 4: Classification of the Results



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 integrate thermal waste treatment fully into the European CO2 trading system (EU ETS) by 2034—while landfilling remains excluded, despite high methane emissions. This particularly affects countries where WtE facilities still compete with landfilling, but also importing countries such as Sweden, the Netherlands, and Germany, where the thermal treatment of imported waste competes with landfilling in the countries of origin. In contrast, concerns about declining waste volumes or stringent recycling legislation are less widespread.

Despite the technical costs, nearly 60% of plant operators want to or must renew or modernize their facilities in the coming years. Most operators assume that their plants' capacities will not change significantly. However, given limited capacities, more operators tend to want to expand their facilities (17%) than to downsize them (5%).

ecoprog hopes for moderate expansion in this area. Given the growing appeal of waste as a fuel in the context of decarbonization, ecoprog currently sees signs of the market overheating, with capacity expansion—particularly in Germany—exceeding domestic demand by a wide margin due to imports. Imports, however, have been and remain volatile and do not provide a solid basis for planning plant investments.

The industry is also keeping an eye on costs—though here, the focus is primarily on the low costs of Chinese competitors, who, against the backdrop of a rapidly shrinking domestic market, are becoming increasingly aggressive, particularly in other emerging markets. When asked about competitors from China, 37% of industrial companies fear intensified cost competition—making this response the one with the highest approval rate among all options. At least 24% of industrial companies feel protected in their segment due to differing market structures.

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The Waste-to-Energy Industry Barometer has been conducted annually since 2012. For the 2026 survey, approximately 500 operators of thermal waste-to-energy plants and more than 700 plant manufacturers and suppliers in the WtE industry worldwide were surveyed. Participants could choose to complete an online questionnaire or respond via email or fax. The survey took place in September 2026.

The survey and analysis were conducted by ecoprog GmbH. As a recognized industry insider, ecoprog supports domestic and international clients with implementation-oriented management issues involving political, technical, or economic aspects in environmental and energy technology. The company is active in strategic consulting as well as in market and competitive analyses and multi-client studies.

For each valid entry in the Industry Barometer, ecoprog donates €10 to SOS-Kinderdorf e.V.

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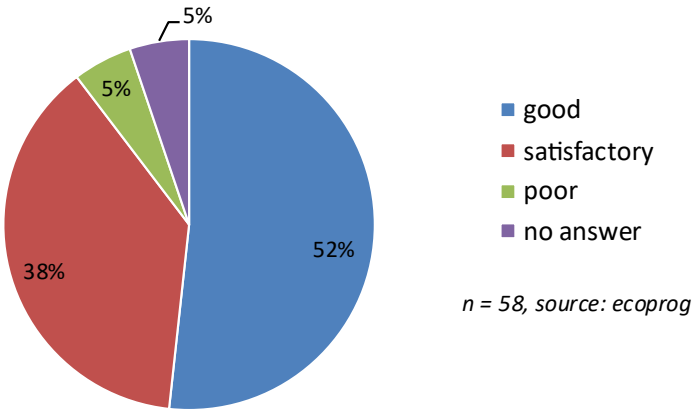
Data Appendix

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Survey of Operators of Waste-to-Energy Facilities

Current Business Situation

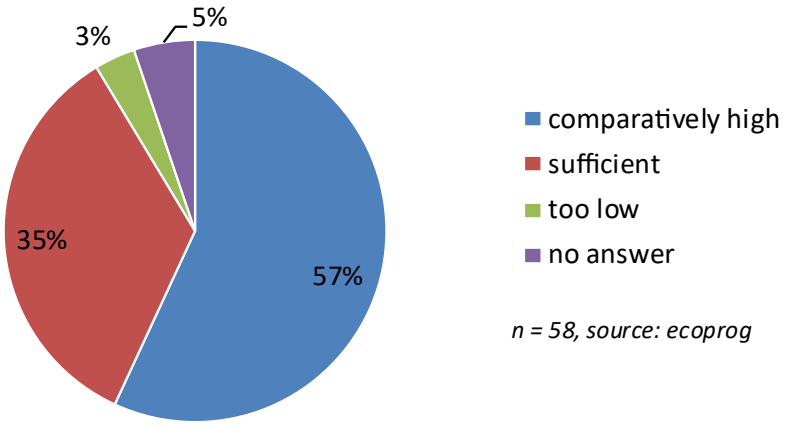
How do you assess your current business situation?



n = 58, source: ecoprog

Current Utilization Rate

How do you assess the current capacity utilisation of your plant?

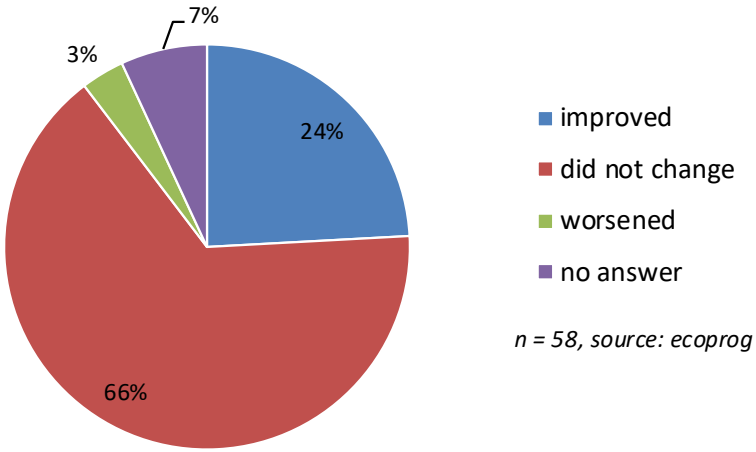


n = 58, source: ecoprog

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Demand over the past 12 months

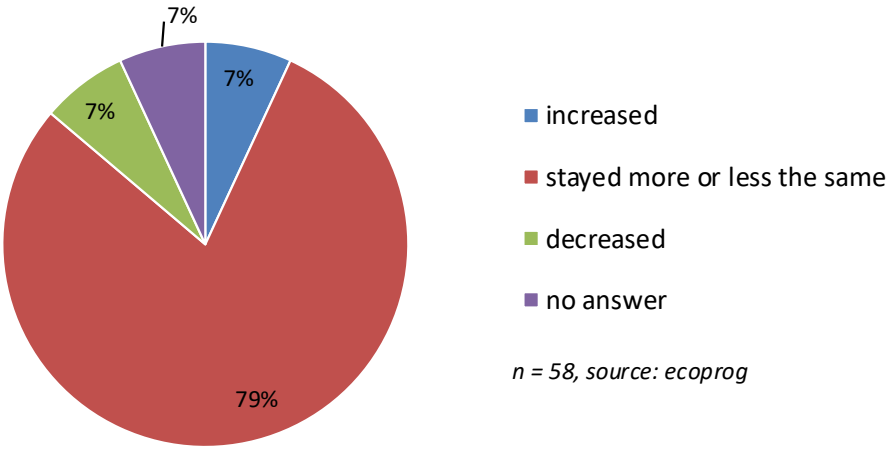
In which way has the demand on the spot market for municipal waste developed in the past 12 months? The demand has…



n = 58, source: ecoprog

Changes in Capacity Utilization Over the Past 12 Months

In the past 12 months, the capacity utilisation of your plant has…

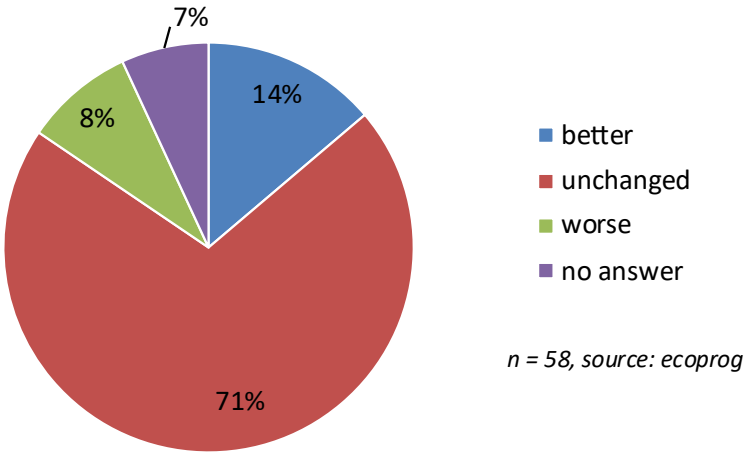


n = 58, source: ecoprog

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Business Outlook

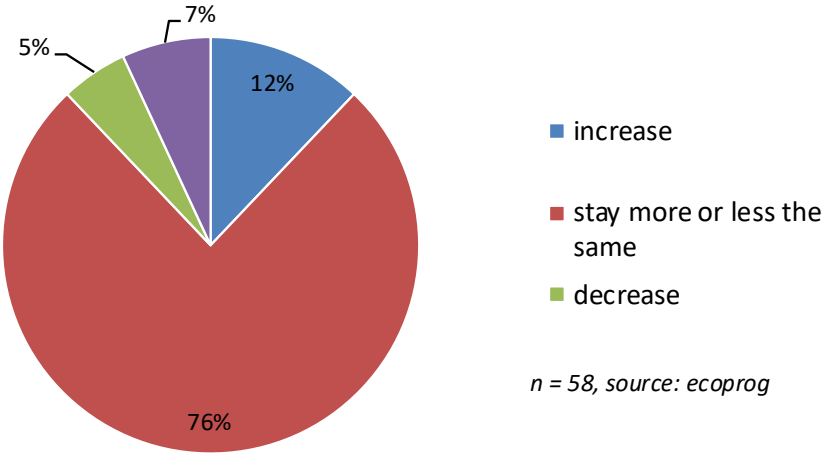
How do you assess your business prospects for the next 12 months?



n = 58, source: ecoprog

Employee Development

In the next 12 months, the number of employees working for your company will..

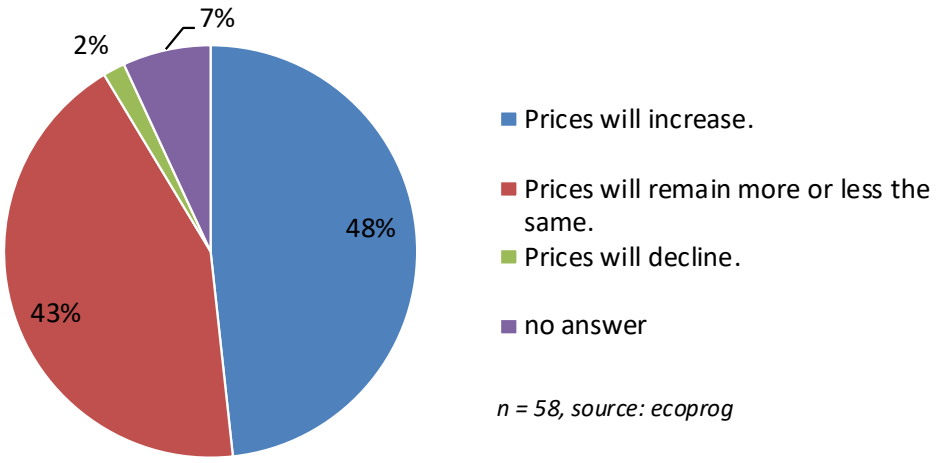


n = 58, source: ecoprog

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Price Trends

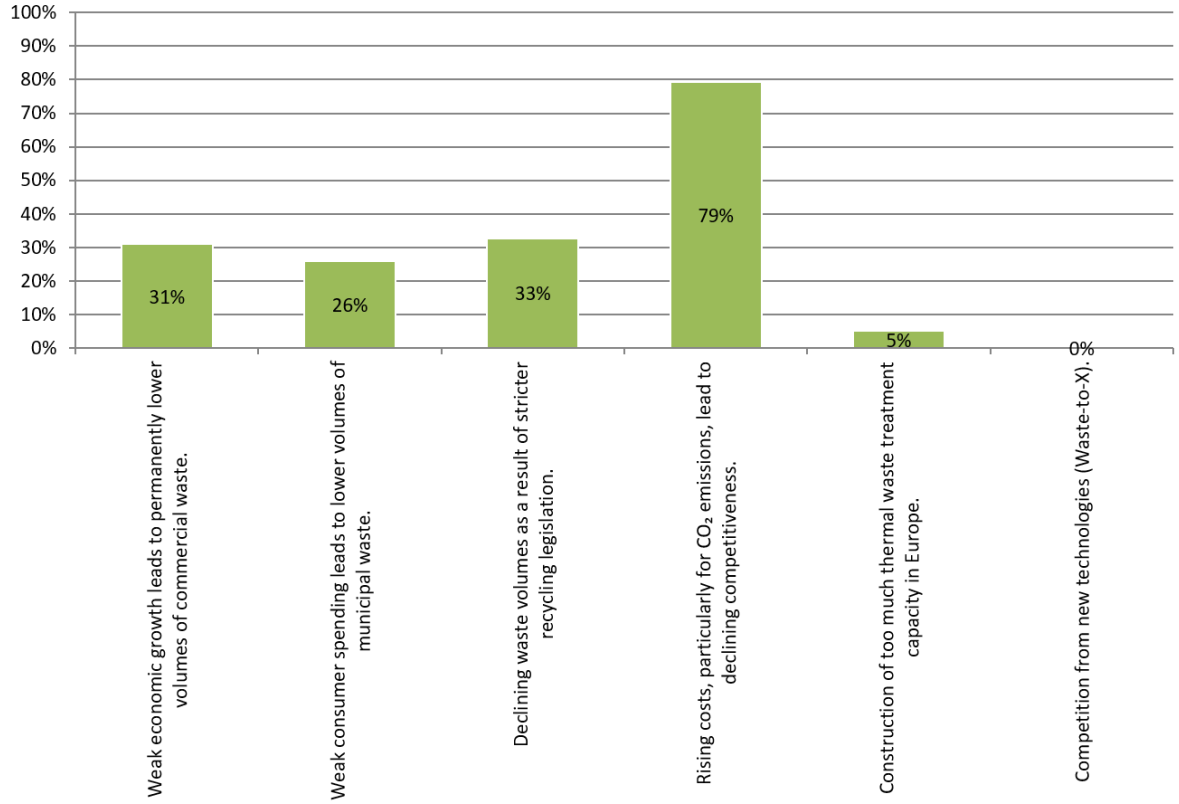
Which development do you expect for gate fees in the 12 months to come?



n = 58, source: ecoprog

Market Trends in Thermal Waste Treatment

What market trends do you expect to see in thermal waste treatment over the next 10 years? (Multiple answers allowed)

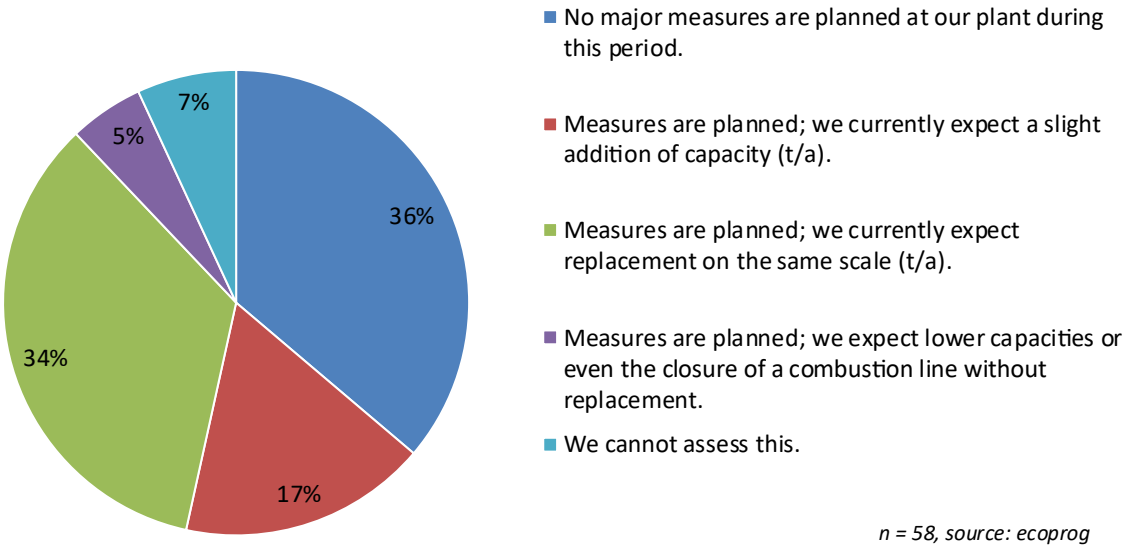


n = 58, source: ecoprog

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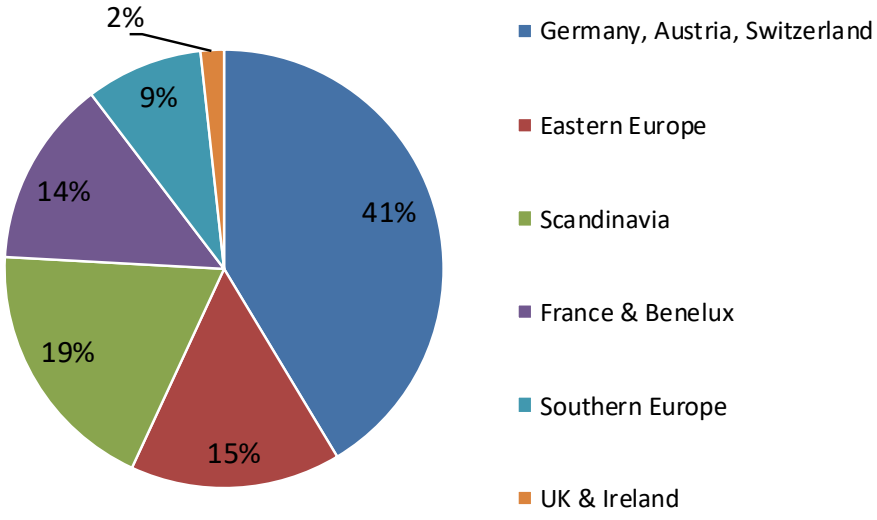
Renovation of combustion lines by 2036

How do you assess the issue of renewal and modernisation of combustion lines at your plant over the next ten years?



n = 58, source: ecoprog

Survey Participants' Facility Locations by Region



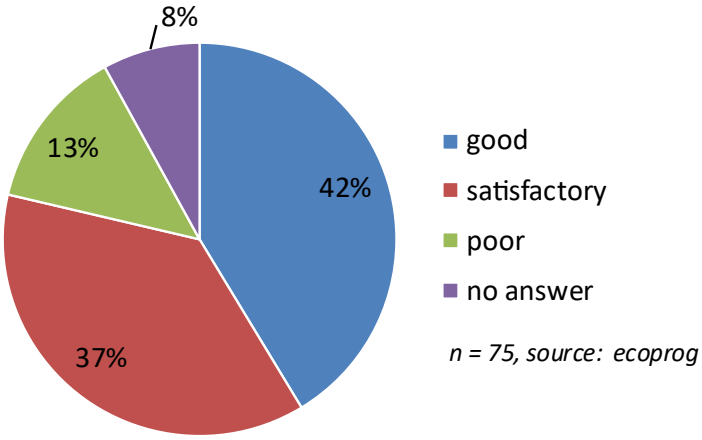
n = 58, source: ecoprog

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Survey of the WtE Industry and WtE Equipment Manufacturers

Current Business Situation

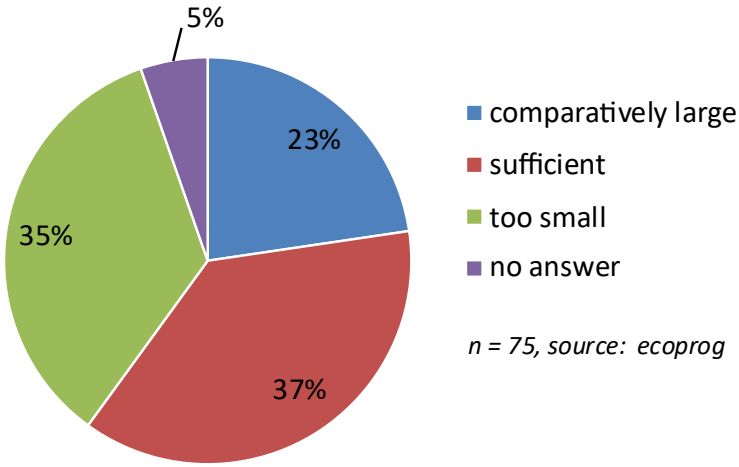
How would you describe your current business situation ?



n = 75, source: ecoprog

Current Order Backlog

How do you asses your present order backlog in the thermal waste treatment segment?

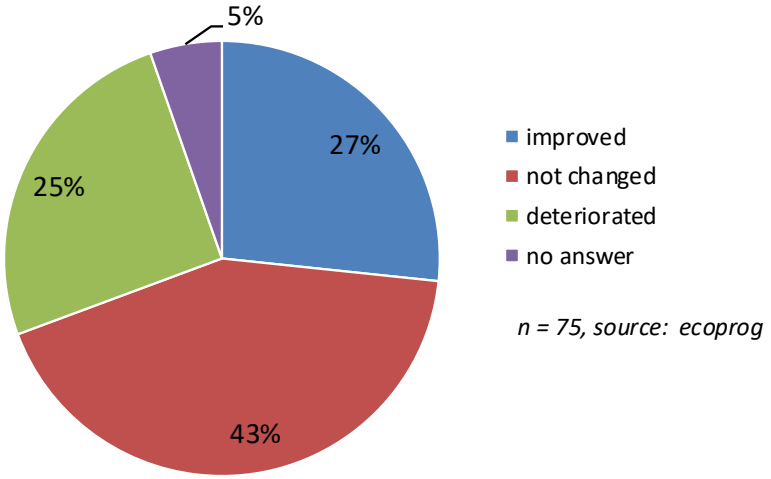


n = 75, source: ecoprog

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Demand over the past 12 months

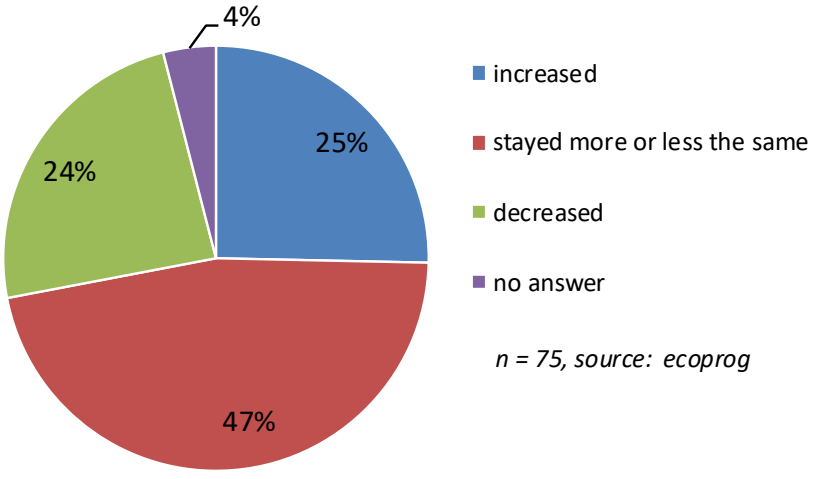
In which way has the demand in the thermal waste treatment segment changed in the past 12 months? The demand has …



n = 75, source: ecoprog

Order Backlog Over the Past 12 Months

In the past 12 months, your order backlog in the thermal waste treatment segment has …

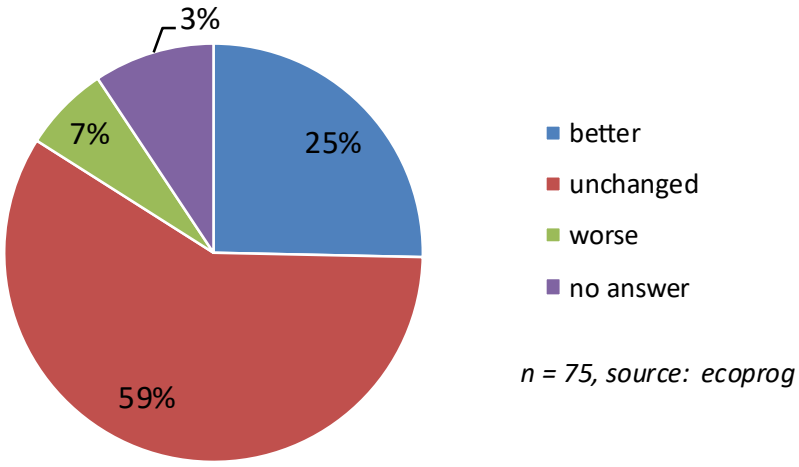


n = 75, source: ecoprog

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Business Outlook

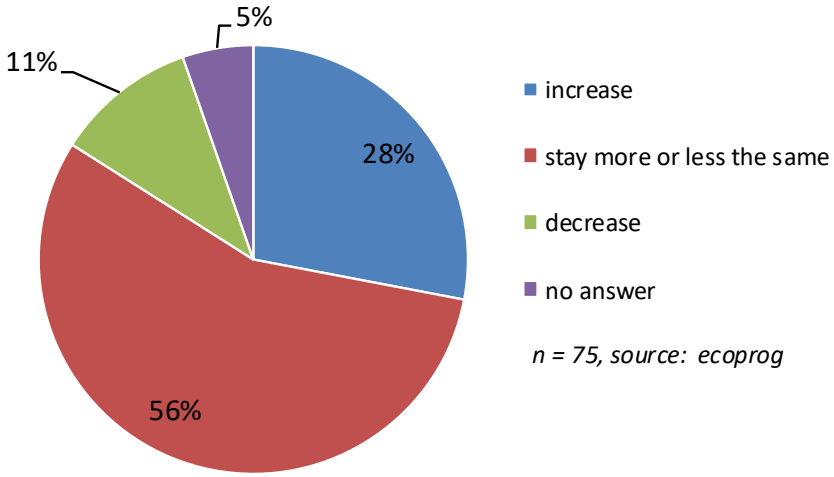
How do you assess your business prospects for the next 12 months?



n = 75, source: ecoprog

Employment Trends

In the next 12 months, the number of your staff will …

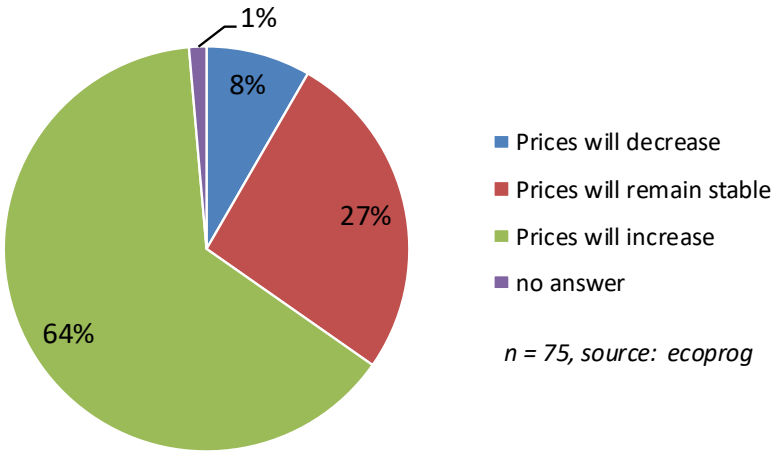


n = 75, source: ecoprog

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Future Price Trends

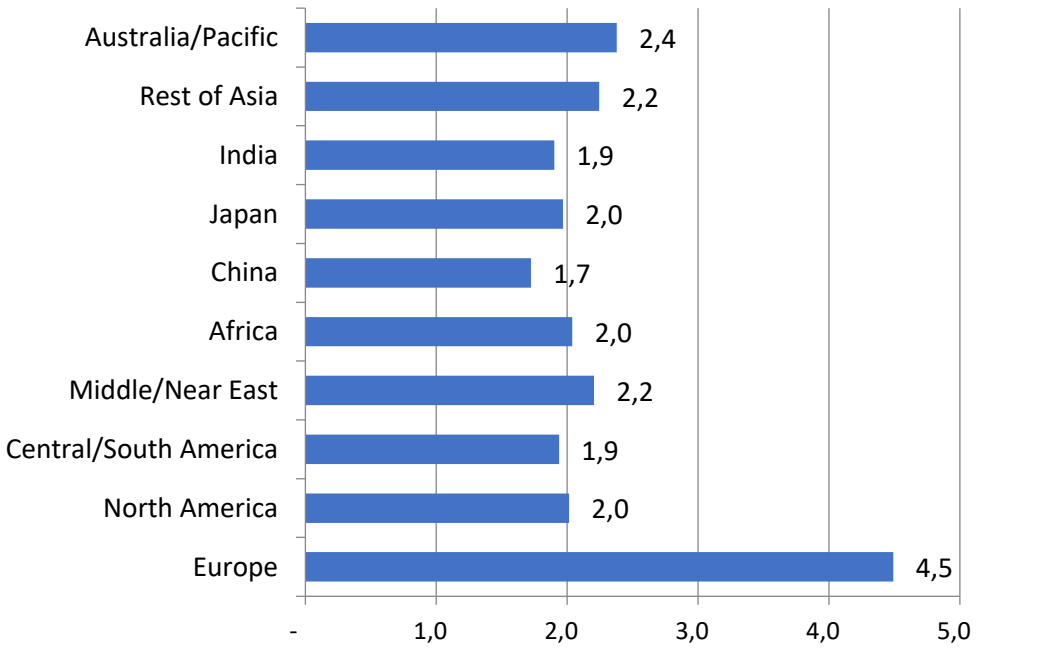
In which way do you expect the prices for constructing, maintaining and modernising thermal waste treatment plants to develop in the next 12 months?



n = 75, source: ecoprog

Current Market Regions

How important are the following markets for your company today? (1=unimportant, 5=very important)

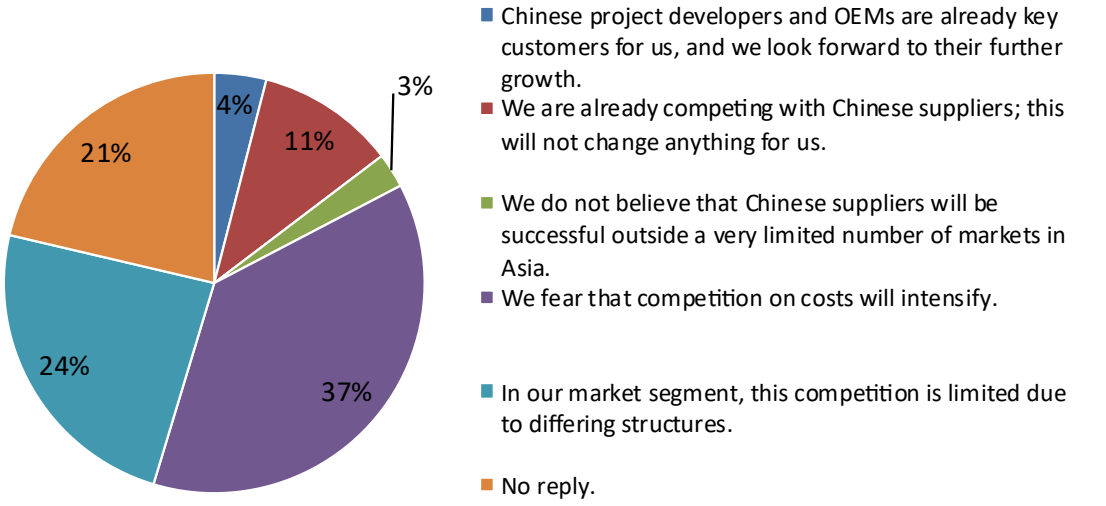


n = 75, source: ecoprog

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Chinese WtE Companies in the International Market

The Chinese WtE market is becoming increasingly saturated, and Chinese project developers, technology providers and suppliers are increasingly expanding into other regions of the world. Which of the following statements do you most agree with?

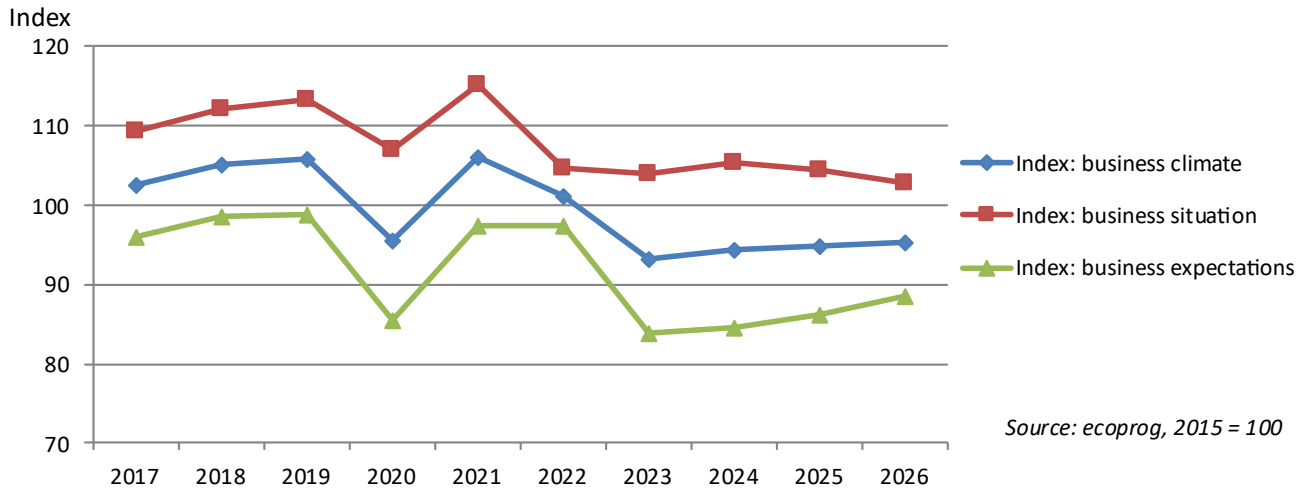


n = 75, source: ecoprog

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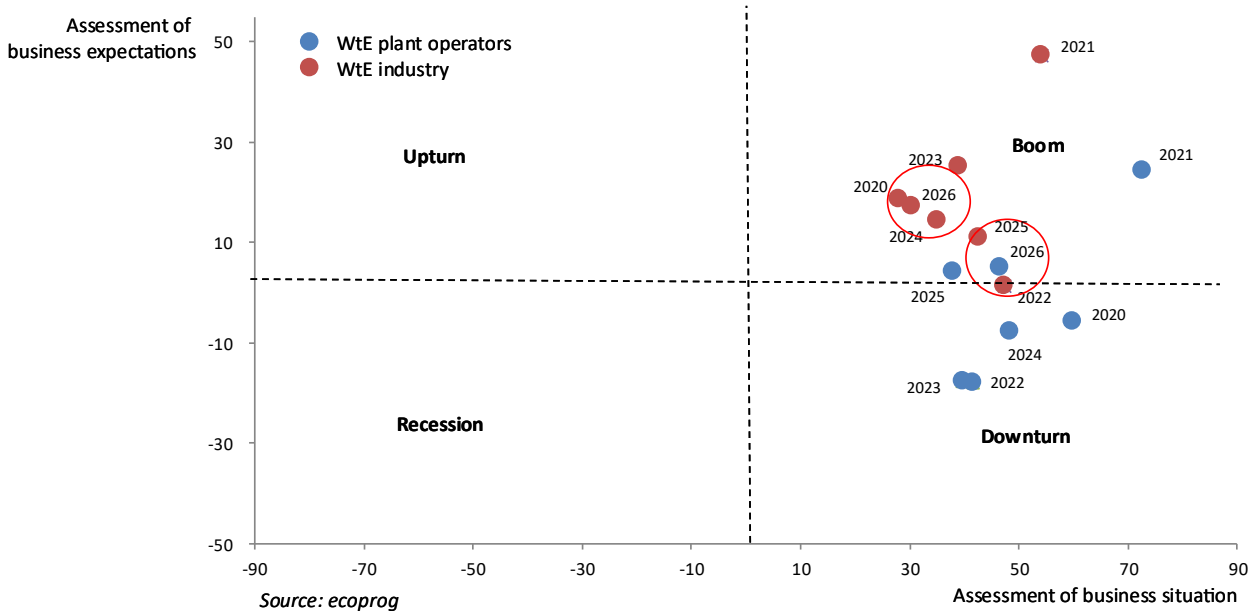
Time Series

Industry Barometer: Operators & Industry



Source: ecoprog, 2015 = 100

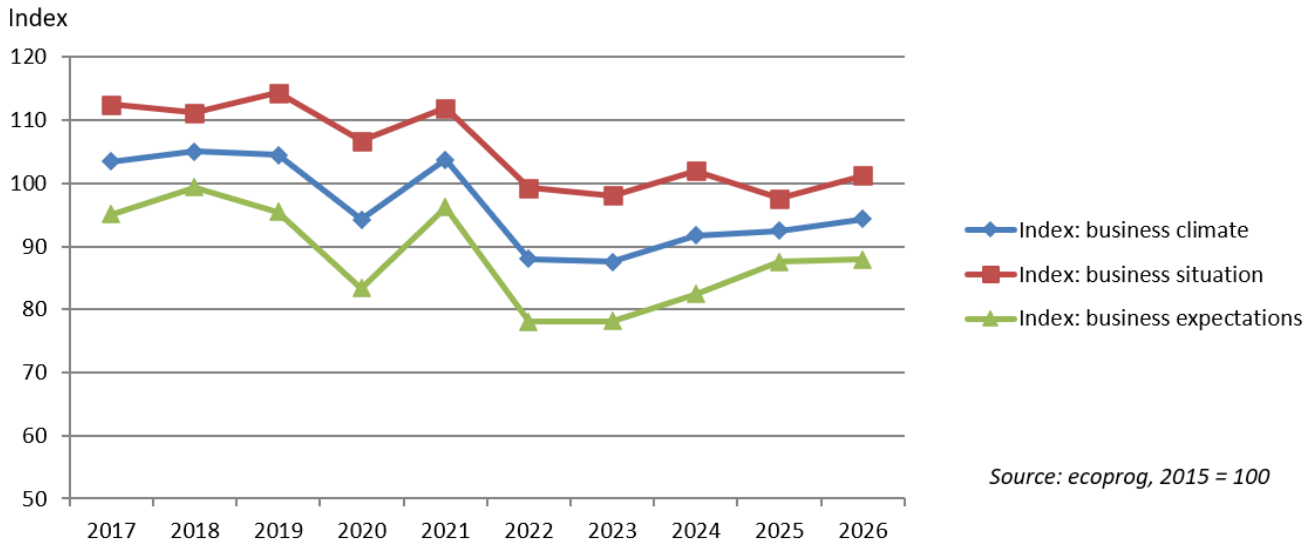
Interpretation of the Results



Source: ecoprog

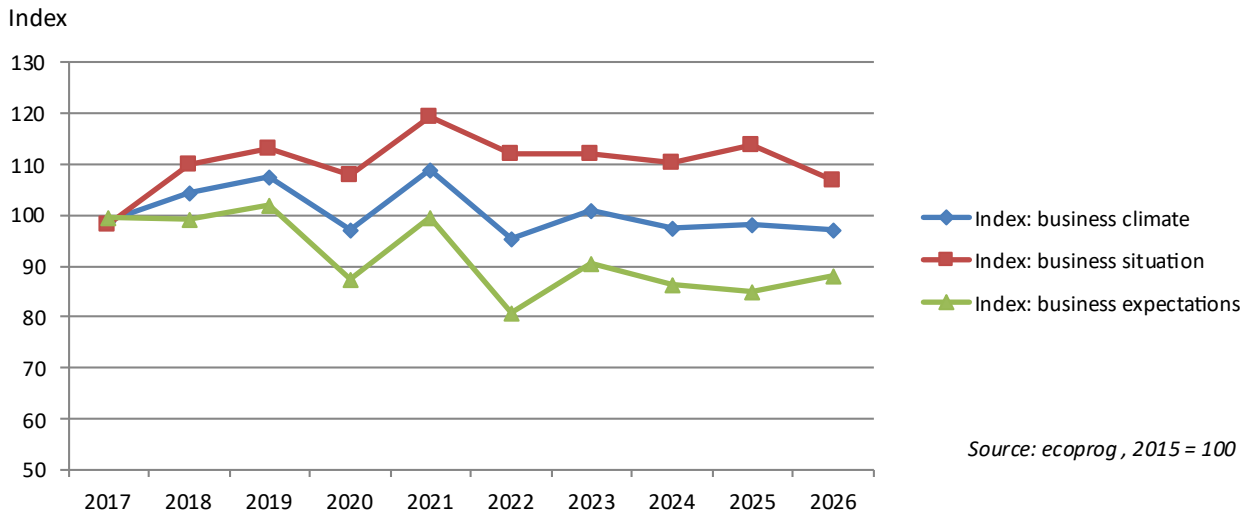
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Industry Barometer: Operators of Thermal Waste-to-Energy Facilities



Source: ecoprog, 2015 = 100

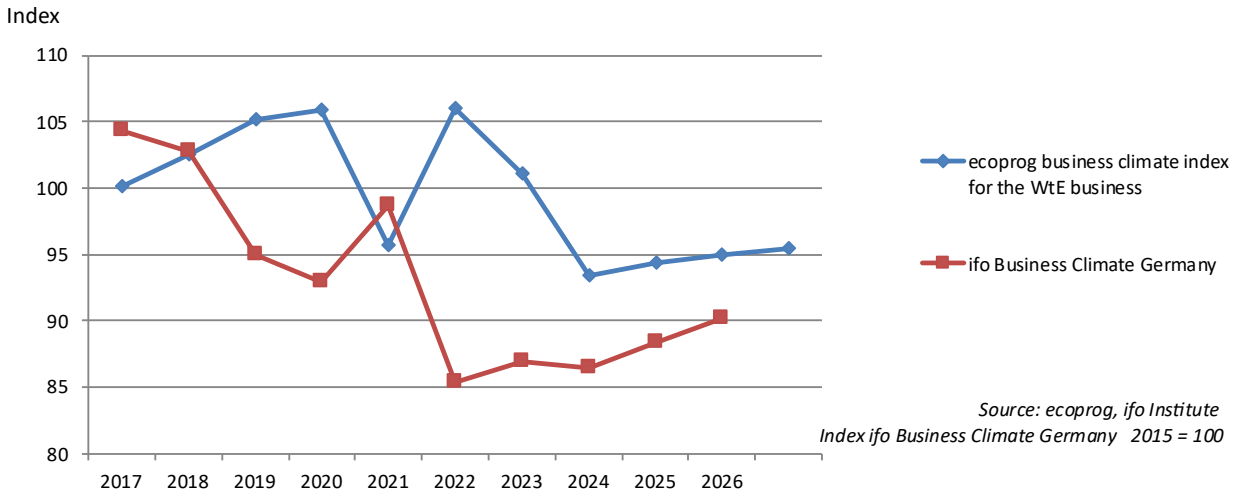
WtE Industry Barometer



Source: ecoprog , 2015 = 100

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Comparison of the ifo Business Climate Index for Germany



Source: ecoprog, ifo Institute
Index ifo Business Climate Germany 2015 = 100

The Business Climate Index for the WtE sector is calculated using the methodology developed by the ifo Institute in the 1950s.

Courtesy of the ifo Institute.

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