

Netherlands Waste To Energy Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 95 pages | Mordor Intelligence

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Report description:

The Netherlands waste to energy market is expected to register a CAGR of more than 2.5% during the forecast period of 2022-2027. The COVID-19 pandemic has already had a tremendous impact on the waste sector. Public authorities and municipal waste operators had to rapidly adapt their waste management systems and procedures during the lockdowns. Due to the COVID-19 safety restrictions, household recycling centers (bring centers) or civic amenity sites were not considered a priority and have been closed. At the same time, people took advantage of getting rid of old furniture, clothes, and electronics and complained because they could not bring their waste to the recycling centers. Unfortunately, the closure of centers often leads to an increase in the illegal disposal of waste, which has been reported in the Netherlands. Factors such as attractive government policies and increasing investments in waste-to-energy industries are expected to drive the market in the Netherlands during the forecast period. However, stringent regulations against any emissions of harmful gas from the incineration of waste are expected to have a negative impact on the Netherlands waste to energy market.

Key Highlights

Due to its simple working and extensive usage, the thermal technologies segment is expected to account for the largest market share in 2021, and it is expected to dominate in the coming years.

The Dutch government has planned to achieve zero carbon emissions by 2050, which is likely to promote the installation and use of renewable energy sources. This is expected to create several opportunities for the Netherlands waste to energy market in the future.

Attractive government policies and increasing investments in the country are expected to drive the waste to energy market in the Netherlands during the forecast period.

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Netherlands Waste to Energy Market Trends

Thermal Technologies Segment to Dominate the Market

The Netherlands is small in area but large in agricultural output. It is the second country in the value of its agricultural output after the United States. As of 2020, it has 1.74 million people, which generates about 535 kg per capita waste. Taking account of total waste production, its management requires a significant effort in the Netherlands.

As of 2021, thermal technologies are expected to account for the largest market share in the Netherlands waste to energy market. This trend of dominance by the thermal division is expected to continue in the coming years due to the increasing developments in incineration and gasification technologies.

In the Netherlands, waste-to-energy plants incinerate residual household and similar waste, which cannot be reused or recycled in an economical and environmentally beneficial way. They are cost-effective and reliable sources of energy in the form of electricity, district heating or cooling, and steam for industrial processes. The heat and electricity delivered to housing and industry reduce fossil fuels used by conventional power plants. Waste-to-energy plants, therefore, help to reduce CO₂ emissions. It is estimated that plants, which utilize cogeneration of thermal power (heating and cooling), together with electricity generation, can reach optimum efficiencies of 80%.

In the present scenario, incineration is the most well-known waste to energy technology for municipal solid waste (MSW) processing. However, waste to energy technologies, particularly combustion, produce pollution and carry potential health safety risks. In order to reduce particulate and gas-phase emissions, incineration plant owners have adopted a series of process units for cleaning the flue gas stream, which has, in turn, led to a significant improvement in terms of environmental sustainability. Therefore, due to the above points, the thermal technology segment is expected to dominate the Netherlands waste to the energy market during the forecast period.

Government Policies and Increasing Investments Driving the Market Demand

It took almost 40 years for the Netherlands to reduce its per capita waste from an estimated 500 kilograms per person down to, in some regions, a comparatively small 21 kg. It is the result of various policy and government approaches to managing municipal waste.

The Netherlands government set a target to achieve a circular economy by 2050. Therefore, the government has implemented several policies for attracting investments in the waste to energy sector to increase the overall recycling rate.

In 2021, the Netherlands hosted the SDE++ 2021 round with a budget of EUR 5 billion. SDE++ stands for sustainable energy production and climate transition. It is a subsidy scheme introduced for renewable energy producers and also for CO₂ reduction techniques that are available for waste to energy market players.

Furthermore, the Dutch government charges landfill tax, which is aimed to help achieve the shift toward less landfilling and more recovery and recycling of waste.

In November 2021, LyondellBasell and its joint venture partner, Covestro, announced the completion of its Circular Steam Project at their site in Maasvlakte, the Netherlands, which converts water-based waste into energy. The facility will result in an overall annual reduction of approximately 0.9 Petajoules of energy use.

Hence, due to the above points, supportive government policies and increasing investments in the country are expected to drive the Netherlands waste to energy market during the forecast period.

Netherlands Waste to Energy Market Competitor Analysis

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The Netherlands waste to energy market is consolidated. Some of the major players include AEB Bio-energiecentrale BV, Axpo Holdings AG, Dutch Incinerators BV, Indaver BV, and Attero BV.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Scope of the Study

1.2 Market Definition

1.3 Study Assumptions

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET OVERVIEW

4.1 Introduction

4.2 Market Size and Demand Forecast in USD million, till 2027

4.3 Recent Trends and Developments

4.4 Government Policies and Regulations

4.5 Market Dynamics

4.5.1 Drivers

4.5.2 Restraints

4.6 Supply Chain Analysis

4.7 PESTLE Analysis

5 MARKET SEGMENTATION

5.1 Technology Type

5.1.1 Thermal Technologies

5.1.2 Non-Thermal Technologies

6 COMPETITIVE LANDSCAPE

6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements

6.2 Strategies Adopted by Leading Players

6.3 Company Profiles

6.3.1 AEB Bio-energiecentrale BV

6.3.2 Axpo Holdings AG

6.3.3 Ingenia Consultants & Engineers BV

6.3.4 Dutch Incinerators BV

6.3.5 Indaver BV

6.3.6 Attero BV

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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