

ecoprogram GmbH

Please note that the study is only available in German language.

Market Study Municipal Sewage Sludge Disposal 2035

The market for sewage sludge disposal is in a state of upheaval. The current situation is characterized by a supply bottleneck as a consequence of, above all, the tightening of the fertilizer legislation against the backdrop of the revised fertilizer ordinance coming into force in 2017. The latter has hampered the application of municipal sewage sludge in the agricultural sector.

Due to the current supply bottleneck, in the past four years, prices for the disposal of sewage sludge have risen by approximately 30 to 40 EUR per tonne, amounting to almost 100 EUR per tonne at present.

In the years to come, the structures of sewage sludge recycling in Germany will be fundamentally changed by the following phenomena: compulsory recycling of phosphorus, further tightening of fertilizer legislation, application prohibitions as well as fossil-fuel phase-out.

In view of this development, ecoprogram GmbH has analyzed the German market for sewage sludge disposal in detail. In doing so, ecoprogram has not only drawn upon its own market insight based on different site-related potential assessments, but has also incorporated public authorities, associations and companies from the branch into the study.

The market study “Municipal sewage sludge disposal 2035” covers the following:

- Detailed analysis of all the essential political, economical, operational and technical trends in the field of municipal sewage sludge disposal in Germany
- Evaluation of the current material flows and disposal channels on a national level as well as regarding 12 defined market regions
- Forecast of these material flows and expected disposal costs based on a transparent methodology within the framework of three scenarios up to the year 2035. **All forecast data up to 2035 per region and per year will be provided in MS Excel**
- Listing and examination of more than 40 mono-incineration projects in Germany, and building on this, analysis of potentials available on the level of the individual market regions. **The list is updated on a monthly basis since April 2020; it is available as an add-on to the market study.**
- Overview of existing solutions for the recycling of phosphorus from ashes obtained from mono-incineration plants
- **Comprised in the study** is a list of more than 530 sewage treatment plants with a capacity exceeding 50,000 population equivalents (size categories 4b and 5), including various data such as location, capacity, throughput, operator, general contact address (not personalized) and site characteristics
- **Optional Data Set:** list of more than 1,650 municipal sewage sludge treatment plants with a capacity exceeding 10,000 population equivalents, with the same data. For another nearly 1,900 municipal sewage sludge treatment plants, only name, location, site and size will be presented.

The Data Set is provided as MS Excel file, featuring the above-mentioned as well as more than another 3,700 sewage sludge treatment plants, comprising 1,600 plants with a capacity exceeding 10,000 population equivalents (size category 4a), for the most part of which the corresponding data are also available. Please see the [data sample](#) on our website.

The market study is available in German language starting at a price of 2,400.- € plus VAT.

Subscribers of ecoprogram's [waste & bio Infrastructure Monitor](#) will receive a discount starting from 600.- € (1,200.- € in case of a Company version).

Please find detailed price information at the [order form](#).

Contact:

Dr. Annika Krüger

ecoprogram GmbH

Tel. +49 221 788 03 88 - 15

a.krueger@ecoprogram.com