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ANMD-MRS35-342

RDF PROCESSING UNITS

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 5,400.0m 2025A market value	**US$ 5,985.0m** 2026E market value	**US$ 11,070.6m** 2032F forecast	**10.8%** CAGR 2025A to 2032F
7 regions Geographic coverage	**21 modules** Country modules	**867 exhibits** Including 113 charts	**203 + 60** Organizations and patent records
2020–2032 Historical data and forecasts		**Global** Regional and country coverage	

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS35-342 | Waste-to-Energy Technologies
Published	September 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	350 pages | 34 chapters | 7 appendices | 867 exhibits including 113 charts
Geography	7 regions | 21 country modules | Residual regional groupings
Segmentation	5 product types plus application and offtake, end user, business model, component and line module, RDF fuel format and deployment scale
Directories	203 organizations based in 28 countries | 60 patent records in 6 jurisdictions
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

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Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, the global market model and the seven-region analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
F	**Foreword** Purpose of the study • Market boundary • Intended readers		
1	**About This Report** Methodology and quality control • Reader's guide and reporting conventions • Scope, inclusion and exclusion rules • Revenue boundaries • Waste hierarchy and feedstock interfaces • Evidence grades and project-status discipline • Biogenic and fossil carbon assumptions ***Selected exhibits*** *Exhibit 1: Reporting Conventions and Units*	1	1
2	**Executive Market Brief** Key market developments • Market in brief • Market outlook in five statements • Regional and country market outlook • Policy and classification environment • Key findings, risks and stakeholder implications • Development timeline ***Selected exhibits*** *Exhibit 3: Regional Market Value, Share and Growth, 2025A vs 2032F | Exhibit 4: Market Implications by Stakeholder*	4 1 chart	4
3	**Executive Summary and Market Metrics Dashboard** What changed this year • What the market is worth and why • Regional and country opportunity ranking • Policy outlook • Where the risks are • Observed deployment outcome patterns • KPI dashboard ***Selected exhibits*** *Exhibit 9: Top Country Markets by 2032F Value | Exhibit 10: Headline KPI Dashboard*	5 1 chart	7
4	**Global Market — Dynamics, Size and Outlook** Industry background and participant map • Market drivers • Market restraints and challenges • Opportunities and strategic frameworks • Global market size and forecast • Processing boundary and fuel specifications • Line mass balance and economics ***Selected exhibits*** *Exhibit 11: Industry Participant Map | Exhibit 22: Indicative RDF and SRF Quality Parameters by Offtaker*	13 2 charts	10
5	**Regional Markets — Seven-Region Overview** Regional dashboard • Regional value and share comparison • Regional demand character • Regional opportunity ranking • Regional map ***Selected exhibits*** *Exhibit 24: Regional RDF Processing Unit Market Trajectories, 2020H-2032F (Chart) | Exhibit 28: Regional Demand Character*	5 2 charts	18
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Country-module requirements ***Highlights*** *21 full country modules | One consolidated residual module per region*	0	20

Part II

Regional, Country, Segmentation and Demand Analysis

Seven-region coverage, 21 country modules and the market series used to compare value, offtake and demand.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** United States • Canada • Rest of North America • Country comparison ***Highlights*** *Value, product, offtake and business-model series for each country | Policy and program matrices for the United States and Canada*	79 11 charts	21
8	**Europe — Regional Analysis and Country Modules** Germany • Netherlands • Denmark-Led Nordics • United Kingdom • Italy • Austria • Rest of Europe • Country comparison ***Highlights*** *Value, product, offtake and business-model series for six country modules | EU Landfill Directive, UK Landfill Tax and MBT-to-RDF network readings*	199 27 charts	47
9	**Asia Pacific — Regional Analysis and Country Modules** China • India • Japan • South Korea • Indonesia-Facing Southeast Asia • Rest of Asia Pacific • Country comparison ***Highlights*** *Value, product, offtake and business-model series for five country modules | Swachh Bharat Mission (Urban) 2.0 and cement co-processing readings*	169 23 charts	109
10	**Latin America — Regional Analysis and Country Modules** Brazil • Chile • Rest of Latin America • Country comparison ***Highlights*** *Value, product, offtake and business-model series for Brazil and Chile | National Solid Waste Policy and EPR readings*	79 11 charts	161
11	**Africa — Regional Analysis and Country Modules** South Africa • Egypt • Kenya • Rest of Africa • Country comparison ***Highlights*** *Value, product, offtake and business-model series for three country modules | Landfill-airspace, waste-reform and cement offtake readings*	109 15 charts	186
12	**Middle East — Regional Analysis and Country Modules** United Arab Emirates • Saudi Arabia • Israel • Rest of Middle East • Country comparison ***Highlights*** *Value, product, offtake and business-model series for three country modules | UAE Net Zero 2050 and Vision 2030 diversion readings*	109 15 charts	220

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
13	**Rest of World — Regional Analysis** Regional overview • Composition and market character • Value and outlook ***Selected exhibits*** *Exhibit 773: Rest of World RDF Processing Unit Market, 2020H-2032F (Chart) | Exhibit 776: Rest of World — Application / Offtake Share, 2026E and 2032F*	**4** 1 chart	**255**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables ***Selected exhibits*** *Exhibit 777: Global Master Series by Product Type, Panel A: 2020H–2026E (US$ Million) | Exhibit 781: Country Reference Table — Value and Growth*	**5**	**257**
15	**Global Segmentation Analysis** Product-type segmentation, primary market split • Secondary segmentation • Overlay axes • Full annual segment series • Cross-tabulation and reconciliation rules ***Selected exhibits*** *Exhibit 782: Global Value Share by Product Type, 2026E (Chart) | Exhibit 796: Global Application / Offtake — Estimate vs Forecast*	**32** 3 charts	**260**
16	**Demand Signals and Forward Indicators** Structural demand signals • Program and policy pipelines • Economic and adoption signals • Indicator dashboard • Leading indicators ***Selected exhibits*** *Exhibit 814: Leading Indicator Dashboard*	**1**	**270**
17	**Adjacent-Market Enablers** Adjacent enabler landscape and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Topic interfaces ***Highlights*** *Upstream collection, transfer and MBT | Downstream cement, energy-from-waste and industrial interfaces*	**0**	**271**

Part III

Competition, Engineering, Innovation, Sustainability and Policy

Competitive structure and company profiles alongside engineering, innovation, sustainability due diligence, value chain and policy frameworks.

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18	**Competitive Analysis and Company Profiles** Market shares and concentration reading • North America • Europe • Asia Pacific • Middle East • Component, technology and specialist participants • Distribution, service and delivery organizations ***Highlights*** *26 company profiles across four regions | Capability and market-significance exhibit for each profile*	**26**	**272**
19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration reading • Directory-evidence presence rankings • Capability matrices • Competitive outlook • Benchmark dimensions ***Selected exhibits*** *Exhibit 841: Directory-Evidence Presence — Leading Product-Intensive OEMs | Exhibit 842: OEM Capability Matrix*	**2**	**284**
20	**Mergers, Acquisitions, Partnerships and Industry Network Analysis** M&A record • Partnership and alliance patterns • Industry network reading • Network map ***Selected exhibits*** *Exhibit 843: Selected M&A and Ownership Changes*	**1**	**286**
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23	**Sustainability Due Diligence, ESG, SDG and Climate Analysis** Environmental performance • Water, resource and circularity context • Social analysis • Double materiality • ESG framework alignment • SDG contribution mapping • Climate risk and adaptation • Anti-greenwashing screen • Waste-hierarchy role of RDF and SRF ***Selected exhibits*** *Exhibit 847: Priority SDG Contribution | Exhibit 851: Climate Risk Matrix*	**7**	**292**
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25	**Policy, Regulation, Legal Structures and Integrated Risk** Waste-regulation and energy-policy frameworks • Subsidy and program architecture by jurisdiction • Standards and certification • Legal structures for delivery • Integrated policy risk • Permitting and worker-protection obligations ***Highlights*** *EU Landfill Directive, Indian co-processing and Gulf diversion programs | EN 15359 and ISO 21640 frame*	**0**	**299**

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Part IV

Risk, Economics, Implementation and Outlook

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No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
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27	**Strategic SWOT and TOWS Analysis** SWOT • TOWS strategic options ***Selected exhibits*** *Exhibit 856: SWOT — RDF Processing Units | Exhibit 857: TOWS Strategic Options*	**2**	**303**
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29	**Observed Implementation Patterns by Stakeholder** Manufacturers and providers • Distributors, integrators and installers • End users and buyer organizations • Governments and programs • Financiers and insurers • Decision criteria ***Highlights*** *Procurement gates, feedstock contracts and offtake conditions by stakeholder*	**0**	**305**
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31	**Pricing, Unit Economics and Financing** Unit cost structure • Buyer economics and payback • Financing context and instruments • Lifecycle economics ***Selected exhibits*** *Exhibit 859: Delivered Cost Drivers*	**1**	**307**
32	**Outlook Synthesis** Where value concentrates to 2032 • What could change the path • Threshold-event indicators ***Highlights*** *Integrated lines, densification and long service contracts | Carbon pricing and feedstock-quality watch points*	**0**	**308**
33	**Key Performance Indicators** Market KPIs • Sustainability KPIs • Delivery KPIs • RDF processing KPI library ***Selected exhibits*** *Exhibit 860: Market KPIs*	**1**	**309**
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Patent Directory 60 patent records across 6 jurisdictions, with assignee, segment and legal status	**0**	**335**
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