ANMD-MRS35-342 · Waste-to-Energy Technologies

RDF Processing Units

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

RDF (refuse-derived fuel) processing units shred, sort, dry and pelletize residual waste into a consistent, high-calorific fuel for cement kilns and energy-from-waste plants — diverting waste from landfill while substituting coal. This decision-grade study sizes the global market three ways — value, units shipped and processing capacity (tpa) — across system type, component and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond fuel, RDF processing delivers measurable landfill diversion, coal substitution and circular-economy outcomes, strengthening the resource-recovery story.

Mapped Sustainable Development Goals:

SDG 7	SDG 13	SDG 11	SDG 12	SDG 15
Affordable Clean Energy	Climate Action	Sustainable Cities	Responsible Consumption	Life on Land

Measurable sustainability outcomes assessed:

- Landfill diversion and disposal-cost avoidance
- Coal substitution and cement-sector decarbonisation via co-processing
- Consistent, specification-grade waste-derived fuel
- Feedstock variability, chlorine limits and offtake-dependence as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

MARKET OVERVIEW

From mixed waste to specification fuel — where shredding, sorting and drying turn residual streams into coal-substitute energy.

The RDF processing units market is moving from basic shredding to integrated, specification-grade fuel conditioning. Demand is driven by landfill diversion and disposal-cost avoidance, cement-sector decarbonisation and co-processing and coal-substitution savings, supported by shredding, sorting and drying technology advances. The market is read three ways — value, units shipped and processing capacity — and forecast under four scenarios, each region reported separately.

- Europe leads on commercial RDF — Germany, France, the Netherlands and the Nordics, on landfill bans and co-processing
- Asia Pacific is the scale engine, with China, Japan, India and South Korea on urban waste growth and new-build programmes
- System type and scale segment the value — across shredding, separation, drying and pelletizing lines
- Specification-grade conditioning is the differentiator — consistent fuel quality unlocks cement and WtE offtake

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Commercial leader	Germany, France, Netherlands, Nordics — landfill bans, circular-economy targets, district heating
Asia Pacific	Scale engine	China, Japan, India, South Korea — urban waste growth, new-build programmes, industrial demand
North America	Accelerating	United States, Canada — RNG incentives, landfill diversion, plant modernisation
Latin America	Emerging	Brazil, Mexico — waste-management investment, methane-mitigation projects
Africa	Frontier	South Africa, Morocco, Egypt — waste infrastructure build-out, blended finance
Middle East	Frontier	Saudi Arabia, UAE, Israel — waste-management investment, circular-economy strategies

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Landfill diversion & disposal-cost avoidance	• Feedstock variability & contamination control
• Cement-sector decarbonisation & co-processing	• Chlorine & calorific-value specification limits
• Coal-substitution & fuel-cost savings	• Offtake-dependence on cement & WtE demand
• Circular-economy & waste-fuel standards	• Capital & operating cost of conditioning
• Shredding, sorting & drying technology advances	• Policy & classification-of-waste uncertainty

SEGMENTATION SNAPSHOT

By System Type	Shredding & sizing · separation & sorting · drying · pelletizing / fluff RDF · integrated RDF plants
By Component	Shredders · separators · screens · dryers · pelletizers · conveyors
By Application	Cement kilns · WtE plants · waste operators · industrial users
By End User	Cement kilns · WtE plants · waste operators · industrial users
By Business Model	Equipment sale · EPC / turnkey · BOT / concession · O&M; contract
By Scale	Small · mid · large

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part V — Company, Competition, Patent and Project Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

Part IX — Annexes, Directories and Reference Material

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans shredding and sorting specialists, established processing-equipment manufacturers, and integrated plant builders. Deal activity — equipment supply, plant EPC and operator partnerships — signals a market consolidating around high-spec, reliable conditioning lines.

Representative players profiled in the full report:

Vecoplan AG · Komptech GmbH · UNTHA shredding technology GmbH · Lindner-Recyclingtech GmbH · Metso Corporation · and 20+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a decision-ready investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global rdf processing units market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the economics of rdf processing units change returns versus incumbent approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- **Triangulated sizing —** every market read across three ways — value, units shipped and processing capacity (tpa) so the views reconcile rather than conflict.
- **Region-honest forecasting —** Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base —** company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline —** every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour —** SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure —** 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, decision-ready investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, EPCs and technology licensors, waste and utility operators, cement and industrial users, municipalities, research institutions, policymakers and lenders, and corporate strategy and ESG teams. This report supports investors, operators, developers, manufacturers, lenders and policymakers — alongside strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.
Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.