

Waste-derived Biogas: Global Markets for Anaerobic Digestion Equipment

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Abstracts

REPORT SCOPE:

The scope of this report includes the market for biogas to energy for five different feedstock sources: municipal and domestic sewage and sewage sludge, industrial wastewater, food waste and landfill-derived or other municipal derived organics (green waste, yard waste, etc.), landfill gas and agricultural (including animal manures and crop residues as well as dedicated energy crops). The biogas market also is broken down by technology category: passive systems, mesophilic digesters, thermophilic digesters, dry digesters and landfill gas.

A discussion of the market by world region includes overviews of North America, Europe and Asia and individual profiles for countries most active in each region. Present market status, biogas production potential, and policies and incentives that support the industry are given for each country. All market valuations and projections cover the years from 2016 to 2022. Market figures are based on the revenues derived from equipment sales and are projected in 2017 constant dollars (i.e., inflation is not computed into the projection figures). Estimated values used are based on manufacturers' total revenues. Projected and forecasted revenue values are in constant U.S. dollars, unadjusted for inflation.

A technology overview, presentation on the structure of the industry and brief profiles for major participating companies also are included.

For the purposes of the report, biogas equipment will be limited to anaerobic digesters and the gas collection equipment needed in landfill gas recovery projects. The machinery used to transform the gas into electricity—reciprocating and other types of gas

engines, turbine and microturbines, and fuel cells—are not included in the analysis. Similarly, systems for biogas upgrading to renewable natural gas (RNG) also are not included in the study.

REPORT INCLUDES:

58 data tables

An overview of the global market for anaerobic digestion equipment used to transform waste materials into sustainable energy

Analyses of global market trends, with data from 2016 to 2017, and projections of compound annual growth rates (CAGRs) through 2022

Information on the best strategies used by governments responsible for sustainable waste handling and energy supply solutions

An examination of current as well as future trends in the market for industry players and technology developers to understand and strategize their investments

Company profiles of major players in the market, including ADI Systems, BDI-BioEnergy International, CH4 Biogas LLC, Ebara Corp., Kruger USA, Republic Services, Inc. and Turning Earth LLC

SUMMARY

The global market for biogas is undergoing several transitions, both globally and regionally. Many years of incremental advances in biogas production technologies are now coalescing to enable new and renewed growth in global and regional biogas production markets, supporting more favorable projectlevel economics. While the industry still substantially relies on government incentives and regulations to bolster market development, the economics of biogas production systems are becoming more and more cost-effective and favorable. At the same time, changes in regulatory structures in Europe, select states in the U.S., China and other Asian countries are driving new trends in regional and national markets. Sunsetting tariffs and market-driving structures in Germany, for example, are providing opportunities for nimble companies to pivot focus to other countries where market potential remains strong and

regulatory and incentive structures are still available.

An increasing number of companies headquartered in Europe—which has long led the world in the development of anaerobic digesters and biogas production technology—are continuing to expand overseas partnerships and market development opportunities. Partnerships between European firms and their Asian and North American counterparts are supporting technology exports to these areas, where increasingly favorable markets and regulatory structures promise to support near- to mid-term growth in biogas deployment. Finally, many biogas applications are also in transition. Increasingly stringent requirements for the management of organic wastes, including food waste and organic fractions of municipal solid waste, are beginning to drive anaerobic digestion markets, with concurrent declines in competing technologies. Additionally, ongoing increases in the stringency of municipal wastewater and sludge treatment requirements, both in developed and emerging/transition economies, have the potential to support growth in wastewater and sludge management applications.

Contents

CHAPTER 1 INTRODUCTION

Study Goals and Objectives
Reasons for Doing this Study
Scope of Report
Information Sources
Methodology
Geographic Breakdown
Analyst's Credentials
Related BCC Research Reports

CHAPTER 2 SUMMARY AND HIGHLIGHTS

CHAPTER 3 MARKET AND TECHNOLOGY BACKGROUND

Biomass Energy Production in the Global Economy
Benefits of Anaerobic Digestion
Advantages of Biogas Production Over Other Forms of Renewable Energy
Barriers to Large-Scale Biogas Plant Deployment
Benefits of Small-Scale Anaerobic Digester Installations
Drawbacks of Small-Scale Anaerobic Digester Installations
Global Biogas Production Potential
Factors Influencing the Biogas Industry
Policy
Incentives
History of Biogas
Anaerobic Digestion Process
Anaerobic Digestion Process Steps and Parameters
Types of Anaerobic Digesters
Anaerobic, Covered Lagoon Digesters
Plug-Flow Anaerobic Digester
Solids Recycling
Anaerobic Contact Digester
Anaerobic Filter
UASB Reactor
Hybrid Reactor
Anaerobic Fluidized Bed Reactors

Anaerobic Baffled Reactor
Anaerobic Migrating Blanket Reactor
Complete Mix/Continuous Stirring
High Solids
Dry Digestion
Expanded Granular Sludge Bed Reactors
Internal Circulation Reactors
Landfill Gas
Anaerobic Digester Categories for Market Evaluation
Passive Digesters
Mesophilic Digesters
Thermophilic Digesters
Dry Digestion
Anaerobic Digestion Feedstock
End Products
Biogas
Biogas Post-Treatment
Biogas Upgrading to RNG
Digestate
Water
Anaerobic Digestion Value Chain

CHAPTER 4 MARKET BREAKDOWN BY TECHNOLOGY TYPE

Scope of the Market Analysis
Passive Anaerobic Digestion Systems
Mesophilic Anaerobic Digestion Systems
Thermophilic Anaerobic Digestion Systems
Dry Anaerobic Digestion Systems
Landfill Gas Systems
Summary of Global Markets by Technology

CHAPTER 5 MARKET BREAKDOWN BY APPLICATION

Scope of the Market Analysis
Wastewater and Wastewater Sludge
Food and Organic Waste
Agricultural
Industrial

Landfill Gas Applications
Summary of Global Market by Application

CHAPTER 6 MARKET BREAKDOWN BY REGION

CHAPTER 7 PATENT REVIEW/ NEW DEVELOPMENTS

Anaerobic Digestion

CHAPTER 8 INDUSTRY TRENDS AND ANALYSIS OF MARKET OPPORTUNITIES

Anaerobic Digestion/Biogas Industry Supply Chains
Industry Organizations
Key Trends Influencing Markets
Industry Diversity, Fragmentation and Maturity
Regulatory Drivers as Key in Many Countries
Market Outside of Strongly Regulated Areas: Multi-Bottom-Line
Rise of Dry Digestion
Anaerobic Digestion and Pretreatment
Anaerobic Digestion and Recovery
Feedstock Availability
Municipal Solid Waste
Wastewater and Sludge Management
Unutilized Capacity
Availability of Capital
Barriers to Renewable Natural Gas Capacity Development
Quest for Efficiency
Regional Diversity in the Anaerobic Digester Industry
Improvements Needed
Financial Requirements and Costs

CHAPTER 9 COMPANY PROFILES

AAT GMBH & CO.
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WABIO TECHNOLOGIE GMBH
WASTE MANAGEMENT
WEHRLE WERK AG
WELTEC BIOPOWER GMBH
WOG TECHNOLOGIES
YIELD BIOGAS SOLUTIONS
ZERO WASTE
ZORG BIOGAS AG

CHAPTER 10 APPENDIX: RELEVANT PATENTS

CHAPTER 11 ENDNOTES

List Of Tables

LIST OF TABLES

Summary Table: Global Market for Biogas Production Technologies, by Application, Through 2022

Table A: Research Information Sources

Table 1: Global Primary Energy Consumption of Fossil Vs. Non-fossil (Renewable, Nuclear, Hydropower), 2015 and 2016

Table 2: Global Primary Energy Consumption, by Source, 2015 and 2016

Table 3: Global Historic and Projected Energy Consumption for Power Generation, by Source, 2012-2040

Table 4: Global Biomass Potential in 2012 and 2035

Table 5: Global Historic and Projected Energy Consumption for Power Generation, by Source, 2012-2040

Table 6: Key Properties of Mesophilic and Thermophilic Anaerobic Digesters

Table 7: Typical Biogas Composition

Table 8: North American Market for Biogas Production Equipment for Passive Systems, by Country, Through 2022

Table 9: European Market for Biogas Production Equipment for Passive Systems, by Country, Through 2022

Table 10: Asian Market for Biogas Production Equipment for Passive Systems, by Country, Through 2022

Table 11: Global Market for Biogas Production Equipment for Passive Systems, by Region, Through 2022

Table 12: North American Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, Through 2022

Table 13: European Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, Through 2022

Table 14: Asian Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, Through 2022

Table 15: Global Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Region, Through 2022

Table 16: North American Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, Through 2022

Table 17: European Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, Through 2022

Table 18: Asian Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, Through 2022

Table 19: Global Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Region, Through 2022

Table 20: North American Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, Through 2022

Table 21: European Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, Through 2022

Table 22: Asian Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, Through 2022

Table 23: Global Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Region, Through 2022

Table 24: North American Market for Biogas Production Equipment for Landfill Gas, by Country, Through 2022

Table 25: European Market for Biogas Production Equipment for Landfill Gas, by Country, Through 2022

Table 26: Asian Market for Biogas Production Equipment for Landfill Gas, by Country, Through 2022

Table 27: Global Market for Biogas Production Equipment for Landfill Gas, by Region, Through 2022

Table 28: Global Market for Biogas Production Equipment, by Technology, Through 2022

Table 29: Global Market Share for Biogas Production Equipment, by Technology, 2022

Table 30: North American Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, Through 2022

Table 31: European Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, Through 2022

Table 32: Asian Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, Through 2022

Table 33: Global Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Region, Through 2022

Table 34: North American Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, Through 2022

Table 35: European Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, Through 2022

Table 36: Asian Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, Through 2022

Table 37: Global Market for Biogas Production Equipment for Food and Organic Waste Applications, by Region, Through 2022

Table 38: North American Market for Biogas Production Equipment for Agricultural Applications, by Country, Through 2022

- Table 39: European Market for Biogas Production Equipment for Agricultural Applications, by Country, Through 2022
- Table 40: Asian Market for Biogas Production Equipment for Agricultural Applications, by Country, Through 2022
- Table 41: Global Market for Biogas Production Equipment for Agricultural Applications, by Region, Through 2022
- Table 42: North American Market for Biogas Production Equipment for Industrial Applications, by Country, Through 2022
- Table 43: European Market for Biogas Production Equipment for Industrial Applications, by Country, Through 2022
- Table 44: Asian Market for Biogas Production Equipment for Industrial Applications, by Country, Through 2022
- Table 45: Global Market for Biogas Production Equipment for Industrial Applications, by Region, Through 2022
- Table 46: North American Market for Biogas Production Applications for Landfill Gas, by Country, Through 2022
- Table 47: European Market for Biogas Production Applications for Landfill Gas, by Country, Through 2022
- Table 48: Asian Market for Biogas Production Applications for Landfill Gas, by Country, Through 2022
- Table 49: Global Market for Biogas Production Applications for Landfill Gas, by Region, Through 2022
- Table 50: Global Market for Biogas Production Equipment, by Application, Through 2022
- Table 51: Global Market Share for Biogas Production Equipment, by Application, 2022
- Table 52: Global Market for Biogas Production, by Region, Through 2022
- Table 53: North American Market for Biogas Production, by Country, Through 2022
- Table 54: European Market for Biogas Production, by Country, Through 2022
- Table 55: Asian Market for Biogas Production, by Country, Through 2022
- Table 56: Annual Granted Patents for Anaerobic Digestion and Biogas Technologies, 2007-2017
- Table 57: Patents by IPC Code, 2007-2017
- Table 58: Patents by CPC Code, 2007-2017
- Table 59: Modifier Analysis: Number of Patents Seeking to Increase, Decrease, or Change/Stabilize Anaerobic Digestion Elements, 2007-2017
- Table 60: Major Active Anaerobic Digester, Biogas and Related Industry Organizations
- Table 61: Patent Review of Anaerobic Digestion Equipment, Through 2017

List Of Figures

LIST OF FIGURES

Summary Figure: Global Market for Biogas Production Technologies, by Application, 2016-2022

Figure 1: Global Primary Energy Consumption of Fossil Vs. Non-fossil (Renewable, Nuclear, Hydropower), 2015 and 2016

Figure 2: Global Primary Energy Consumption, by Source, 2015 and 2016

Figure 3: Global Historic and Projected Energy Consumption for Power Generation, by Source, 2012-2040

Figure 4: Covered Lagoon Anaerobic Digester

Figure 5: Plug-Flow Anaerobic Digester

Figure 6: Complete Mix Anaerobic Digester with Solids Recycling

Figure 7: Complete Mix Anaerobic Digester

Figure 8: Dry Digester (Batch Type)

Figure 9: Anaerobic Digestion Value Chain

Figure 10: North American Market for Biogas Production Equipment for Passive Systems, by Country, 2016-2022

Figure 11: European Market for Biogas Production Equipment for Passive Systems, by Country, 2016-2022

Figure 12: Asian Market for Biogas Production Equipment for Passive Systems, by Country, 2016-2022

Figure 13: Global Market for Biogas Production Equipment for Passive Systems, by Region, 2016-2022

Figure 14: North American Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, 2016-2022

Figure 15: European Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, 2016-2022

Figure 16: Asian Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Country, 2016-2022

Figure 17: Global Market for Biogas Production Equipment for Mesophilic Anaerobic Digesters, by Region, 2016-2022

Figure 18: North American Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, 2016-2022

Figure 19: European Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, 2016-2022

Figure 20: Asian Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Country, 2016-2022

Figure 21: Global Market for Biogas Production Equipment for Thermophilic Anaerobic Digesters, by Region, 2016-2022

Figure 22: North American Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, 2016-2022

Figure 23: European Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, 2016-2022

Figure 24: Asian Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Country, 2016-2022

Figure 25: Global Market for Biogas Production Equipment for Dry Anaerobic Digesters, by Region, 2016-2022

Figure 26: North American Market for Biogas Production Equipment for Landfill Gas, by Country, 2016-2022

Figure 27: European Market for Biogas Production Equipment for Landfill Gas, by Country, 2016-2022

Figure 28: Asian Market for Biogas Production Equipment for Landfill Gas, by Country, 2016-2022

Figure 29: Global Market for Biogas Production Equipment for Landfill Gas, by Region, 2016-2022

Figure 30: Global Market Share for Biogas Production Equipment, by Technology, 2022

Figure 31: North American Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, 2016-2022

Figure 32: European Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, 2016-2022

Figure 33: Asian Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Country, 2016-2022

Figure 34: Global Market for Biogas Production Equipment for Wastewater and Sludge Applications, by Region, 2016-2022

Figure 35: North American Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, 2016-2022

Figure 36: European Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, 2016-2022

Figure 37: Asian Market for Biogas Production Equipment for Food and Organic Waste Applications, by Country, 2016-2022

Figure 38: Global Market for Biogas Production Equipment for Food and Organic Waste Applications, by Region, 2016-2022

Figure 39: North American Market for Biogas Production Equipment for Agricultural Applications, by Country, 2016-2022

Figure 40: European Market for Biogas Production Equipment for Agricultural Applications, by Country, Through 2022

- Figure 41: Asian Market for Biogas Production Equipment for Agricultural Applications, by Country, 2016-2022
- Figure 42: Global Market for Biogas Production Equipment for Agricultural Applications, by Region, 2016-2022
- Figure 43: North American Market for Biogas Production Equipment for Industrial Applications, by Country, 2016-2022
- Figure 44: European Market for Biogas Production Equipment for Industrial Applications, by Country, 2016-2022
- Figure 45: Asian Market for Biogas Production Equipment for Industrial Applications, by Country, 2016-2022
- Figure 46: Global Market for Biogas Production Equipment for Industrial Applications, by Region, 2016-2022
- Figure 47: North American Market for Biogas Production Applications for Landfill Gas, by Country, 2016-2022
- Figure 48: European Market for Biogas Production Applications for Landfill Gas, by Country, 2016-2022
- Figure 49: Asian Market for Biogas Production Applications for Landfill Gas, by Country, 2016-2022
- Figure 50: Global Market for Biogas Production Applications for Landfill Gas, by Region, 2016-2022
- Figure 51: Global Market Share for Biogas Production Equipment, by Application, 2022
- Figure 52: Global Market for Biogas Production, by Region, 2016-2022
- Figure 53: North American Market for Biogas Production, by Country, 2016-2022
- Figure 54: European Market for Biogas Production, by Country, 2016-2022
- Figure 55: Asian Market for Biogas Production, by Country, 2016-2022
- Figure 56: Annual Granted Patents for Anaerobic Digestion and Biogas Technologies, 2007-2017
- Figure 57: Patents by IPC Code, 2007-2017
- Figure 58: Patents by CPC Code, 2007-2017
- Figure 59: Biogas and Anaerobic Digestion Patent Action Words
- Figure 60: Global Distribution of Patents for Anaerobic Digestion and Biogas, by Region, 2007-2017
- Figure 61: Corporate Leaders in Anaerobic Digestion and Biogas Registered Patents, 2007-2017
- Figure 62: Code Map Detail for Anaerobic Digestion and Biogas, Registered Patents, 2007-2017
- Figure 63: Anaerobic Digester Supply Chain I: Engineered Systems
- Figure 64: Anaerobic Digester Supply Chain II: Packaged Systems
- Figure 65: States with Renewable Portfolio Standard Policies as of February 2017

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AAT GMBH & CO.
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