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Global Biomass- and Waste-to-Energy Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Biomass- and Waste-to-Energy market size is expected to reach $ 153036 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

Biomass- and Waste-to-Energy refers to equipment, technologies, and integrated plant solutions that convert biomass resources and waste streams into electricity and/or usable thermal energy. The market covers energy conversion based on agricultural and forestry residues, wood-processing residues, municipal solid waste, refuse-derived fuel, sewage sludge, organic waste, and other suitable renewable or recoverable feedstocks. Core conversion routes include grate combustion, fluidized bed combustion, gasification, anaerobic digestion with power generation, and pyrolysis, with steam turbine generation and combined heat and power representing major energy-output configurations. Direct combustion remains the principal commercial pathway for solid biomass power generation, while grate combustion is a highly established solution for mixed municipal waste and fluidized bed systems provide greater flexibility for heterogeneous biomass, residues, sludge, and refuse-derived fuels. The research scope focuses on municipal and public-utility plants, independent power producer projects, and industrial captive-energy installations serving waste treatment, renewable power generation, industrial steam and power supply, district heating, and agricultural, forestry, pulp and paper, and other resource-intensive industries.

Key Findings

Bioenergy and waste supplied 3% of global electricity in 2024

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Asia held over two-fifths of 2025 bioenergy installed capacity

Grate combustion remains core technology for mixed municipal waste

Fluidized bed technology supports diverse biomass and waste fuels

Combined heat and power improves overall energy utilization efficiency

Market Trends

The Biomass- and Waste-to-Energy industry is moving from stand-alone power generation toward integrated energy and resource-recovery systems. Plant developers increasingly emphasize fuel flexibility, higher steam parameters, improved heat recovery, advanced flue-gas treatment, automated combustion control, and lower lifecycle operating costs. For biomass projects, the ability to process fuels with wide variations in moisture, calorific value, particle size, and ash characteristics is becoming increasingly important, strengthening the role of bubbling and circulating fluidized bed technologies in multi-fuel applications. For municipal waste projects, mature grate systems continue to benefit from their ability to process mixed waste without extensive pretreatment, while tighter environmental requirements are increasing the importance of combustion optimization, particulate and acid-gas removal, nitrogen-oxide control, and continuous emissions management. Another structural change is the increasing integration of electricity generation with process steam, district heating, recovered-material utilization, digital operation, and, in selected projects, carbon-management technologies. This shifts project value creation from simple fuel combustion toward higher energy efficiency, lower emissions, and lifecycle plant optimization.

Market Dynamics

Drivers

Growth in Biomass- and Waste-to-Energy is supported by the combined requirements of renewable energy development, reliable dispatchable generation, landfill diversion, waste-management infrastructure investment, and industrial decarbonization. Unlike variable wind and solar resources, biomass-based power can provide controllable generation and can simultaneously supply process heat or steam, making the technology particularly relevant to industrial facilities and district-energy systems. Waste-to-energy also addresses two infrastructure requirements within one project: controlled

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treatment of non-recyclable waste and recovery of usable electricity and heat. Waste-management policy generally positions energy recovery below waste prevention and recycling but above final disposal, supporting projects where residual waste volumes remain structurally significant.

Restraints

The principal restraints are high initial investment, complex project development, fuel-supply uncertainty, increasingly demanding environmental controls, and sensitivity to local electricity and heat economics. Biomass plants require stable long-term access to feedstock with acceptable moisture, calorific value, ash chemistry, transportation distance, and seasonal availability; deterioration in any of these variables can materially affect boiler efficiency and operating costs. Waste-to-energy projects additionally require sophisticated flue-gas treatment, ash handling, monitoring systems, and regulatory compliance. Emission standards covering particulates, nitrogen oxides, acid gases, heavy metals, mercury, dioxins, and furans increase technical complexity and capital requirements, particularly in highly regulated markets.

Opportunities

The strongest opportunities are developing around industrial energy substitution, multi-fuel conversion, modernization of existing fossil-fuel boilers, higher-efficiency combined heat and power, and integrated treatment of difficult waste streams. Pulp and paper, wood processing, food and agricultural processing, and other steam-intensive industries can combine locally available residues with process-energy demand, improving project utilization rates and reducing dependence on purchased fossil fuels. Recent projects also demonstrate increasing demand for systems capable of co-processing biomass and industrial waste while producing both electricity and process heat. In municipal markets, opportunities are increasingly linked to replacement or modernization of aging facilities, higher energy recovery, tighter emission compliance, and integration of material recovery and carbon-management functions rather than simple expansion of incineration capacity.

Challenges

Long-term challenges center on securing feedstock quality, maintaining public and regulatory acceptance, controlling project construction risk, and preserving the

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economic role of energy recovery as recycling and waste-reduction policies advance. Waste-to-energy operators must demonstrate that projects complement rather than displace prevention, reuse, and recycling, particularly in mature circular-economy markets. At the plant level, corrosion, fouling, ash characteristics, changing waste composition, and variable biomass quality require robust boiler design and continuous operational optimization. Commercial competitiveness also depends increasingly on lifecycle availability and service capability because unplanned outages can reduce both waste-processing capacity and energy revenue.

Industry Chain Analysis

The upstream chain of Biomass- and Waste-to-Energy begins with feedstock generation, collection, preprocessing, and logistics. Biomass supply originates mainly from forestry residues, agricultural residues, wood-processing by-products, dedicated biomass resources, and organic residues, while waste-to-energy feedstocks originate from municipal and industrial waste streams, refuse-derived fuels, sludge, and other recoverable waste fractions. Feedstock preparation can involve sorting, shredding, drying, size control, storage, blending, and contamination management. The economics of this upstream stage differ fundamentally between biomass and municipal waste: biomass often represents a purchased fuel with collection and transportation costs, whereas waste projects can have a treatment-service component alongside energy recovery. Consequently, project competitiveness depends not only on conversion efficiency but also on the stability and contractual structure of feedstock supply.

The midstream is centered on combustion or conversion equipment, boilers, fuel-feeding systems, steam systems, turbines and generators, anaerobic digestion equipment where applicable, flue-gas treatment, ash and residue handling, automation, engineering integration, construction, commissioning, and lifecycle services. Equipment value is increasingly concentrated in high-reliability combustion systems, corrosion-resistant heat-transfer surfaces, environmental-control systems, automation, and plant integration rather than in individual commodity components. Downstream value is created through electricity sales, industrial steam and heat supply, district heating, waste-treatment services, and industrial captive-energy consumption. Projects combining stable waste or biomass supply with continuous heat demand generally have more pathways to monetize recovered energy than electricity-only projects.

Segment Insights

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By feedstock source, Biomass-to-Energy and Waste-to-Energy have different commercial structures despite sharing substantial boiler, steam-cycle, and emissions-control technologies. Biomass projects are closely linked to agricultural, forestry, wood-processing, and industrial residue supply, while waste-to-energy projects are more closely linked to municipal infrastructure and long-term waste-treatment requirements. Within the technology structure, grate combustion remains particularly suitable for mixed municipal solid waste because it tolerates wide variation in waste composition with limited preprocessing. Fluidized bed combustion has a stronger position where operators require multi-fuel capability, including biomass, sludge, residues, and refuse-derived fuel, because fluidized combustion can accommodate substantial variation in moisture, heating value, and ash characteristics.

Gasification and pyrolysis provide additional pathways for converting solid feedstocks but generally require greater control of feedstock characteristics and project integration, while anaerobic digestion is structurally better suited to biodegradable and high-organic-content waste streams. From an energy-output perspective, combined heat and power offers an important efficiency advantage in locations with stable industrial or district-heating demand, whereas electricity-only plants remain relevant where heat offtake infrastructure is unavailable. This creates substantial differences in project economics even among facilities using similar conversion technologies.

Downstream Market Opportunities

Downstream opportunities are shifting toward applications where waste disposal requirements and continuous energy demand overlap. Municipal solid waste treatment remains a core application because energy recovery can reduce landfill dependence while providing electricity and heat, whereas industrial applications are increasingly driven by the need to replace fossil-fired steam and captive power. Pulp and paper and wood-processing facilities are particularly compatible with biomass energy because residues can be generated on-site and process steam demand is continuous. Agricultural processing can similarly utilize crop residues and other biomass streams. District-heating markets create additional value for waste-to-energy and biomass plants because recovered heat can increase total energy utilization beyond electricity-only operation.

Regional Insights

Asia represents the largest installed base of bioenergy power capacity, accounting for

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more than two-fifths of global bioenergy capacity in 2025, while Europe represented close to three-tenths. Asia's market structure combines large municipal waste-to-energy deployment with agricultural and forestry biomass resources, creating demand across both grate-combustion and fluidized-bed systems. China is a particularly important installed-capacity center, while Japan has a mature municipal waste-treatment infrastructure and a strong domestic engineering supplier base. The region's longer-term opportunity is increasingly associated with higher-efficiency plants, industrial residue utilization, modernization, and stricter environmental controls rather than capacity addition alone.

Europe is a technologically mature Biomass- and Waste-to-Energy market characterized by strong integration with district heating, industrial heat supply, circular-economy policy, and stringent emissions requirements. Energy-recovery incineration represents approximately one-quarter of treated municipal waste in the European Union, illustrating the established role of the technology within the waste-management system. North America has a smaller bioenergy installed-capacity share and a more heterogeneous waste-to-energy development environment, with project economics and permitting varying significantly by jurisdiction. South America has a meaningful bioenergy base associated with agricultural and agro-industrial resources, supporting opportunities in industrial captive generation and combined heat and power.

Report Scope

This report studies the global Biomass- and Waste-to-Energy demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Biomass- and Waste-to-Energy, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Biomass- and Waste-to-Energy that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Biomass- and Waste-to-Energy total market, 2021-2032, (USD Million)

Global Biomass- and Waste-to-Energy total market by region & country, CAGR,

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2021-2032, (USD Million)

U.S. VS China: Biomass- and Waste-to-Energy total market, key domestic companies, and share, (USD Million)

Global Biomass- and Waste-to-Energy revenue by player, revenue and market share 2021-2026, (USD Million)

Global Biomass- and Waste-to-Energy total market by Type, CAGR, 2021-2032, (USD Million)

Global Biomass- and Waste-to-Energy total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Biomass- and Waste-to-Energy market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Covanta, SUEZ, WIN Waste Innovations, Veolia, China Everbright, EEW, Attero, Paprec, AEB Amsterdam, Viridor, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Biomass- and Waste-to-Energy market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Biomass- and Waste-to-Energy Market, By Region:

United States

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China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Biomass- and Waste-to-Energy Market, Segmentation by Type:

Biochemical Reactions

Thermal Technologies

Global Biomass- and Waste-to-Energy Market, Segmentation by Feedstock Source:

Biomass-to-Energy

Waste-to-Energy

Global Biomass- and Waste-to-Energy Market, Segmentation by Energy Output:

Electricity-Only Generation

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Combined Heat and Power (CHP)

Global Biomass- and Waste-to-Energy Market, Segmentation by Application:

Waste Disposal

Energy

Other

Companies Profiled:

Covanta

SUEZ

WIN Waste Innovations

Veolia

China Everbright

EEW

Attero

Paprec

AEB Amsterdam

Viridor

AVR

Tianjin Teda

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Grandblue

CNTY

Shanghai Environment

Sanfeng Environment

Mitsubishi Heavy Industries

TAKUMA CO., LTD.

Key Questions Answered

1. How big is the global Biomass- and Waste-to-Energy market?
2. What is the demand of the global Biomass- and Waste-to-Energy market?
3. What is the year over year growth of the global Biomass- and Waste-to-Energy market?
4. What is the total value of the global Biomass- and Waste-to-Energy market?
5. Who are the Major Players in the global Biomass- and Waste-to-Energy market?
6. What are the growth factors driving the market demand?

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