

Global Refuse-Derived Fuel (RDF) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Refuse-Derived Fuel (RDF) market size is expected to reach \$ 8171 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Refuse-Derived Fuel (RDF) is an alternative fuel produced from combustible components such as municipal solid waste, commercial waste, general industrial solid waste, packaging waste, waste plastics, waste paper, textiles, and wood residues through processes including sorting, crushing, screening, magnetic separation, air classification, drying, homogenization, and compression baling or pelletizing. It is primarily used in applications such as co-processing in cement kilns, waste-to-energy incineration, industrial boilers, district heating, and combined heat and power (CHP) systems. In 2025, global sales volume was approximately 72.46 million tons, the average unit price was around \$74.5 per ton, and the capacity utilization rate was approximately 72.6%. Upstream enterprises mainly include municipal sanitation service providers, solid waste collection and transport companies, commercial and industrial waste recyclers, and manufacturers of sorting, crushing, screening, and drying equipment, as well as environmental engineering firms. Downstream enterprises primarily include cement plants, waste-to-energy plants, industrial boiler operators, heating companies, lime kiln operators, and industrial park energy companies. The gross profit margin is approximately 24.8%; the product cost structure comprises raw material collection and pre-treatment (approx. 31%), sorting, crushing, and drying (approx. 24%), labor and O&M (approx. 15%), transportation and warehousing (approx. 13%), environmental testing and compliance (approx. 7%), equipment depreciation (approx. 6%), and other costs (approx. 4%). Regarding demand, the downstream requirements include the need for alternative fuels (replacing coal) in cement kilns, co-firing in waste incinerators, cost reduction for industrial boilers, fuel substitution for

district heating in industrial parks, landfill volume reduction, and resource recovery from solid waste. Downstream customers include cement groups, municipal waste treatment companies, power generation operators, industrial park energy companies, building material enterprises, CHP enterprises, and local environmental protection platforms. In terms of business opportunities, policy drivers stem primarily from mandates regarding landfill reduction, the circular economy, 'dual carbon' goals, waste sorting, and the co-processing of waste in industrial kilns. Technological innovation is driven by advancements in intelligent sorting, near-infrared (NIR) recognition, low-chlorine control, online calorific value monitoring, energy-efficient drying, and pelletization. Meanwhile, shifting consumer demands—reflected in heightened public interest in waste reduction, low-carbon energy, resource circularity, and corporate green supply chains—are propelling the evolution of refuse-derived fuel (RDF) from low-end, crudely processed material into a standardized fuel characterized by high calorific value, low moisture and chlorine content, and consistent quality.

The growth logic of the refuse-derived fuel (RDF) market is shifting from simple waste disposal to the synergistic development of solid waste resource recovery and industrial alternative fuels. Industry value is no longer derived solely from reducing landfill reliance and disposal pressure; instead, it increasingly stems from providing sustainable fuel sources to cement manufacturers, building material producers, district heating providers, and energy companies. Globally, the European market features a mature standards system, a solid foundation for co-processing in cement kilns and cross-regional fuel distribution, and high market acceptance of high-quality solid recovered fuel (SRF). The Asia-Pacific region offers greater growth potential, driven by vast quantities of municipal and industrial solid waste in China, India, and Southeast Asia, although commercialization, quality standards, and long-term off-take contracts are still evolving. Regarding products, standard waste-based fuels—characterized by low calorific value, high moisture content, and high impurity levels—have limited bargaining power. In contrast, high-quality RDF—subjected to advanced sorting, drying, chlorine control, and homogenization—more easily gains access to cement kilns, industrial boilers, and regional energy systems. On the competitive landscape, large solid waste operators control feedstock sources and project resources, cement groups control stable off-take channels, and specialized fuel suppliers excel in quality control, logistics, and contract services. Future opportunities lie primarily in solid waste resource recovery projects within city clusters, fuel substitution in industrial parks, low-carbon retrofitting of cement kilns, utilization of post-sorting waste residues, and the construction of regional pre-treatment centers; however, the industry still faces constraints such as transportation radius limits, chlorine content control, emissions regulations, public acceptance, and price volatility. Overall, the RDF market is poised for steady growth,

transitioning from a fragmented, rudimentary supply model toward one characterized by standardization, long-term contracts, and high-quality products.

This report studies the global Refuse-Derived Fuel (RDF) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Refuse-Derived Fuel (RDF) 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 Refuse-Derived Fuel (RDF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Refuse-Derived Fuel (RDF) total production and demand, 2021-2032, (K MT)

Global Refuse-Derived Fuel (RDF) total production value, 2021-2032, (USD Million)

Global Refuse-Derived Fuel (RDF) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Refuse-Derived Fuel (RDF) consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Refuse-Derived Fuel (RDF) domestic production, consumption, key domestic manufacturers and share

Global Refuse-Derived Fuel (RDF) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Refuse-Derived Fuel (RDF) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Refuse-Derived Fuel (RDF) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Refuse-Derived Fuel (RDF) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Veolia Environnement S.A. (FR), SUEZ SA (FR), Geocycle (CH), CEMEX Regenera (MX), Heidelberg Materials AG (DE), Biffa plc (GB), Renewi plc (GB), ResourceCo Pty Ltd (AU), REMONDIS SE & Co. KG (DE), PreZero SE (DE), 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 Refuse-Derived Fuel (RDF) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, 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 Refuse-Derived Fuel (RDF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Refuse-Derived Fuel (RDF) Market, Segmentation by Type:

Dense RDF

Loose RDF

Global Refuse-Derived Fuel (RDF) Market, Segmentation by Form:

Solid-Derived Fuel

Liquid-Derived Fuel

Gas-Derived Fuel

Global Refuse-Derived Fuel (RDF) Market, Segmentation by RDF Grade:

RDF-2

RDF-3

RDF-4

RDF-5

RDF-6

Other

Global Refuse-Derived Fuel (RDF) Market, Segmentation by Application:

Cement Plants

Coal Fired Power Plants

Combined Heat and Power (CHP)

Other

Companies Profiled:

Veolia Environnement S.A. (FR)

SUEZ SA (FR)

Geocycle (CH)

CEMEX Regenera (MX)

Heidelberg Materials AG (DE)

Biffa plc (GB)

Renewi plc (GB)

ResourceCo Pty Ltd (AU)

REMONDIS SE & Co. KG (DE)

PreZero SE (DE)

FCC Environment Ltd (GB)

Urbaser SA (ES)

N+P Group B.V. (NL)

Geminor AS (NO)

Andusia Recovered Fuels Ltd (GB)

Beauparc Group (IE)

G.uun Co., Ltd. (JP)

Re Sustainability Ltd (IN)

Giant Resource Recovery (US)

Saubermacher AG (AT)

Reworld (US)

China Everbright Environment Group (CN)

Grandblue Environment (CN)

Key Questions Answered:

1. How big is the global Refuse-Derived Fuel (RDF) market?
2. What is the demand of the global Refuse-Derived Fuel (RDF) market?
3. What is the year over year growth of the global Refuse-Derived Fuel (RDF) market?
4. What is the production and production value of the global Refuse-Derived Fuel (RDF) market?
5. Who are the key producers in the global Refuse-Derived Fuel (RDF) market?
6. What are the growth factors driving the market demand?

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