Vaccani, Zweig & Associates’ (VZ&A) newest “European Market Share Analysis of Thermal Waste Treatment Plants” is now available. The analysis contains the latest 2010 figures, a year-by-year detailed analysis of awards from 2000 to 2010, and the backlog of plants under construction respectively to be started up in 2011 and thereafter. All data is detailed by supplier and country. In addition to Europe, the analysis includes awards in the Middle East, Russia and the Russian Republics. For historic comparison, the report also contains detailed information on European plants started up between 1995 to 2001.

For the first time, we included fluidized bed awards by Ebara (in Germany and Switzerland), and gasification awards by KIV and JFE (in Slovenia and Italy respectively). The enhanced analysis gives a more comprehensive picture of the EfW market size over the past years.

A new analysis shows the year-by-year market split by technology from 2000 to 2010. In this context a large number of companies offering gasification/pyrolysis were contacted. However, up to 31.12.2010 their projects were still in planning phase, and are, therefore, not included in this award analysis. At a later stage this year, we are planning to issue a separate research paper on the market development status of leading gasification, pyrolysis and autoclave suppliers for MSW/RF worldwide.

Over the past decade, the trend towards increased recycling, and, thermal treatment of "secondary recovered fuel" (SRF) has steadily increased, and SRF will certainly continue to remain an important market segment. A new analysis shows the year-by-year market split by fuel source from 2000 to 2010.

Responding to many customers’ interest in a year-by-year analysis of the market split by contract type, e.g. new capacity, replacement, revamping, we have now also included this analysis.

Key highlights of this year’s analysis are:

- Noticeable market growth of 19% over 2008/09 award volumes
- Italy was the largest market in 2010 followed by Russia
- FBE has the highest market share in 2010 followed by CNIM
- The UK procurement pipeline yielded only one award in 2010, however, strong volume is expected 2011/12
- UK was by far the largest market in the last three years (2008 to 2010), followed by Germany, Italy and France with about equal shares
- AE&E Inova still holds the overall market leadership position for the last three years (2008 to 2010) despite low order intake in 2010
The companies covered in the analysis are:

- AE&E Inova AG/Von Roll Inova (since 2011 owned by Hitachi Zosen-HITZ)
- AE&E Lentjes GmbH (since 2011 not part of AE&E Group)
- Babcock & Wilcox Velund A/S
- Baumgarte Boiler Systems / Standardkessel (BBS/SK)
- CNIM (Martin grate)
- Ebara Corporation
- Energos Ltd.
- Fisia Babcock Environment GmbH
- JFE Engineering Corporation
- KAB Takuma
- Keppel Seghers
- KIV
- Martin GmbH
- Noy Vallesina Engineering
- Stiefel GmbH
- Thermoselect S.A.
- VINCI Environnement
- Visser & Smit Hanab GmbH

For more details please refer to the table of contents below.

**Table of Contents**

1. Executive Summary
2. Analysis of European Plants / Awards Started-up in 1995 - 2001
3. Analysis of European Plants / Awards in 2000 - 2010
   3.2. Capacity Awarded in 2000 - 2010 by Supplier
   3.4. Year-by-year Market Share Breakdown of Capacity Awarded in 2007 - 2010 by Supplier
   3.7. Overview Market Share in 2000 - 2010 by Supplier
   3.8. Geographical Distribution of Market Share of Plants / Awards in 2000 -2010
   3.11. Year-by-year Geographical Distribution of Capacity Awarded in 2007 -2010
4. Backlog Analysis of European Plants / Awards to Start-up 1.1.2011 and Thereafter
   4.1. Backlog Market Shares by Supplier
   4.2. Backlog of Ordered Capacity by Supplier
   4.3. Backlog Market Shares by Country
   4.4. Backlog of Ordered Capacity by Country
5. Plants / Awards per Supplier and Year, 2000 – 2010
6. Plants / Awards per Country and Year, 2000 – 2010 (NEW)
7. Analysis of Plants / Awards by Fuel Type, 2000 - 2010 (NEW)
9. Analysis of Plants / Awards by Technology, 2000 - 2010 (NEW)
10. Plants / Awards by Type of Capacity (New, Replacement, Revamping) (NEW)
11. Ranking of Main Competitors by Country and Market Position
   11.1. AE&E Inova AG / Von Roll Inova (since 2011 owned by Hitachi Zosen): Awards 2000 - 2010
   11.5. CNIM (Martin grate): Awards 2000 - 2010
   11.7. Energos Ltd.: Awards 2000 - 2010
   11.9. JFE Engineering Corporation: Awards 2000 - 2010 (NEW)
   11.10. KAB Takuma GmbH: Awards 2000 - 2010
   11.11. Keppel Seghers: Awards 2000 - 2010
   11.12. KIV: Awards 2000 - 2010 (NEW)
   11.15. VINCI Environnement (SGE): Awards 2000 - 2010
12. List of European Plants / Awards by Supplier, 1995 – 2010