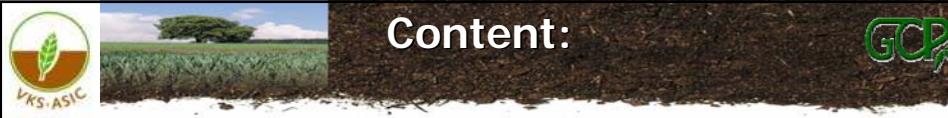


Questions and Needs from the composting and digesting industry

Andreas Röthlisberger
Vice President ASCP



12.03.2008 Andreas Röthlisberger 1



Content:

- 1) What happend in the market in the last 10 years?
- 2) What have we done in the last 10 years to improve
- 3) Influence of the energy-industry (Electricity, Gas)
- 4) Influence of the studies to the composting and digesting industry
- 5) Future requierements to the composting and digesting industry



12.03.2008 Andreas Röthlisberger 2

What happened in the market in the last 10 to 20 years? (1)

- The waste directive of Switzerland (avoid, recycle, incinerate) lead to separate collections of bio household waste
- Ban of disposal lane and bag fee made increase the amount of bio waste from household and from horticulture
- Composting in professional plants were generally recognised
- Kompogas started with the first digesting plants
- Agriculture composting (along country lane) was to come up
- Generally private companies

12.03.2008 Andreas Röhliberger 3

What happened in the market in the last 10 to 20 years? (2)

- Sewage sludge was brought to agriculture (got well paid for it)
- Compost lost economic value
- Strong increase of biowaste from household to be composted
- Very local market, not organised Swiss-wide
- Quality?

12.03.2008 Andreas Röhliberger 4




What have we done in the last 10 years to improve (1)

- ❑ Composting and digesting industry start to organise itself ==> Association of Swiss Composting and Digesting Plants in 1999 (VKS - ASIC - ASCP)
- ❑ Simple concept:
Training - Quality - Control
- ❑ **Quality Directive (2001):**
 - compost for agriculture
 - compost for open horticulture
 - compost for closes horticulture
 - definition of digestate and presswater

12.03.2008 Andreas Röhliberger 5




What have we done in the last 10 years to improve (2)

- ❑ Set up **training courses:**
 - for basics
 - for quality securing
 (over 450 participants up today)
- ❑ Set up a **Control System** (organisation composed by the 3 associations)
 - works in mandate of cantons
 - since 4 years (3 annual reports)
 - 75% of the amount of biowaste from household in control

12.03.2008 Andreas Röhliberger 6




What have we done in the last 10 years to improve (3)



- ❑ Set up a **national Inspectorate Commission**

Round Table with all Stakeholders:

- representatives of federal offices of environment, of agriculture, of energy, representatives of cantons,
- representatives of research institutes,
- representatives of branch associations

discussion and decisions of all questions about composting, digesting, control-system, quality



12.03.2008 Andreas Röhliberger 7

Influence of the energy-industry (Electricity, Gas) (1)

- ❑ Canton of Zurich: Waste law requires energy out of biowaste
- ❑ New national energy law: Promotion of renewables energies (cost covering compensation)
- ❑ Entry of Axpo in the market (purchasing Kompogas)
- ❑ Farmers pushed to invest in biogas installations („energy farmers“)
- ❑ Strongly growing demand for biowaste (waste becomes raw material)



12.03.2008 Andreas Röhliberger 8

Influence of the energy-industry (Electricity, Gas) (2)

- Danger 1:** Focus on energy only
- Danger 2:** compost and digestate pass the way of sewage sludge syndrome
 ==> quality of compost and digestates so bad, that they must be incinerated
- Chance 1:** Together we have responsibility to make products that can be given to soil with positive aspects on an long term view
- Chance 2:** Let us make the best out of the results of the 2 studies (good revision of our quality directive)



12.03.2008 Andreas Röhliberger 9

Influence of the studies to the composting and digesting industry

- Thank you to the federal offices of environment, agriculture and energy, as to canton of Zurich
- Happy about the fact to have 2 studies (pollutants and benefits)
- Confirmed in our conviction to do a good job
- We take serious problems of PAHs
 ==> search paths to get in
- We give the ball back to scientists: look for better and more effective methods
- We are working on the revision of our quality directive

12.03.2008 Andreas Röhliberger 10

Future requirements to the composting and digesting industry (1)

- With 800`000 t we have reached the potential (200`000t more are in the black bags for incineration plants!)
 - ==> every new installation comes in a saturated market
- Equal level playing field** for composting and digesting industry with the agriculture
 - ==> **Let us find models with win-win-solutions**
- New competitors** coming up:
 - sewage cleaning plants
 - incineration plants

12.03.2008 Andreas Röhliberger 11




Future requirements to the composting and digesting industry (2)

What do we have to do:

- Improve quality of our products
- Come up with the revised quality directive (based on market needs!)
 - ==> good label for excellence
- Improve our control-system
- Build up a strong lobbying and a good network
- Pool the strengths of the associations

12.03.2008 Andreas Röhliberger 12