

# WASTE MANAGEMENT & RECYCLING – UK – 2024

The lack of progress in waste reforms are holding back investment in the waste sector. To accelerate progress towards recycling targets, implementing the reforms without further delay is critical.



Claudia Preedy, Senior  
B2B Analyst



# Waste Management & Recycling – UK – 2024

## This report looks at the following areas:

- Recent trends in waste arisings, local authority waste collections and treatment.
- How the government plans to achieve its circular economy ambitions and the implications for the waste management industry.
- Financial performance of key industry players.
- Market drivers for investment in the UK reprocessing and recycling industry.

## Overview

### Elevated inflation impacts both waste management companies and local authorities

Waste management companies and local authorities have been impacted by rising fuel prices and soaring inflation, which has increased cost pressures. Elevated inflation has also increased the funding cap faced by local authorities, with many warning that they would have to make cuts to local neighbourhood services such as waste collection, road repairs, libraries, and leisure services in 2024/25.

### Delays in waste reforms hold back industry investment

Uncertainty around government waste reforms has slowed investment in UK waste management and recycling infrastructure, potentially delaying the transition to a circular economy. While the government's "Simpler Recycling" plans and timelines for Extended Producer Responsibility and Deposit Return Schemes, have provided some clarity on some



The lack of progress in waste reforms are holding back investment in the waste sector. To accelerate progress towards recycling targets, implementing the reforms without further delay is critical.

**BUY THIS REPORT NOW**

**€1800.00 | £1495.00 | \$1995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



issues, key details are still pending. The NIC also warns that there is a lack of an integrated approach to managing these reforms.

### **Advancements in recycling technology will help boost recycling rates**

There is a strong industry focus on developing recycling technology to help tackle plastic packaging waste, including developing techniques that tackle difficult-to-recycle plastic packaging formats. Key areas of innovation include the adoption of AI technology and robotics to sort waste more accurately, “tag and trace” technology and chemical recycling techniques, which will be key to progress soft plastic recycling.

**BUY THIS REPORT NOW**

**€1800.00 | £1495.00 | \$1995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

## Report Content

### EXECUTIVE SUMMARY

#### Opportunities for the waste management and recycling sector

- Technological advancements will boost efficiency, recycling rates and reduce costs
- Carbon Capture for EfW plants to play an important role in decarbonising residual waste treatment
- Greater clarity on waste reforms would be a catalyst for investment

#### Market dynamics and outlook

- Market size & forecast
- Market predictions
- Total waste arisings and forecast
  - Graph 1: total waste arisings and forecast, 2019-28
- Waste arisings by sector
  - Graph 2: waste arisings, by sector, 2019-23
- Commercial & industrial waste arisings remain below pre-pandemic levels
- Household waste arisings show long-term downward trend
- Composition of dry recycling
  - Graph 3: composition of dry recycling from English households, 2013 and 2023
- Just 12% of local authorities offer kerbside recycling collection for plastic film
- Incineration with EfW exceeds recycling as the most used method of waste disposal
- Recycling rates in England have stagnated since 2013...
- ...whilst Wales is a global leader in recycling
- Significant investment in UK recycling infrastructure required
- 'Big five' dominate sector

### MARKET DYNAMICS

#### Waste arisings

- Total waste arisings declined in 2023 amid an uncertain macroeconomic environment
- Waste arisings by sector
  - Graph 4: waste arisings, by sector, 2019-23
- Construction and demolition industries generate the most waste
- Commercial & industrial waste arisings remain below pre-pandemic levels
- Household waste arisings shows long-term downward trend
- Household waste arisings by country
  - Graph 5: household waste arisings, by country, 2019-22

# Waste Management & Recycling – UK – 2024

---

- Composition of household waste
  - Graph 6: composition of waste from English households, 2023
- A quarter of household waste is sent for dry recycling
- Composition of dry recycling
  - Graph 7: Composition of dry recycling from English households, 2013/23
- Nearly two-thirds of food waste comes from households
- Government 'off-track' to hit waste reduction targets

## Waste collection

- Breakdown of local authority waste management expenditure
  - Graph 8: England budget revenue expenditure on waste management, net current expenditure, 2020/21-2023/24
- Local authority budgets remain under pressure
- Around half of local authorities run in-house municipal waste management service
- Local-authority-collected waste generation in England
- Local authority funding boost required to implement waste reforms
- Household waste collection frequency
  - Graph 9: household residual waste collection, by frequency and country, 2020
- Fortnightly household residual waste collections are most common
  - Graph 9: household residual waste collection, by frequency and country, 2020
- Fewer than half of local authorities collect recyclable materials in co-mingled streams
- Recycling collection services
- Contamination in dry recycling remains a serious issue
- Importance of feedback loops in tackling contamination
- Food waste collection services
  - Graph 10: household food waste collection, by nation, 2017-21
- Vast majority of household food waste found in residual waste stream

## Waste treatment

- Categories of waste treatment
- Local-authority-collected waste treatment in England
  - Graph 10: local-authority-collected waste treatment, England, 2019-23
- Incineration with EfW now exceeds recycling as the most used method of waste disposal
- Waste sent to landfill continues to fall
- Volume of waste sent for recycling in England fell in 2022/23
- Recycling rates in England have stagnated since 2013...
- ...whilst Wales is a global leader in recycling
- Household recycling rates by nation
  - Graph 11: household waste recycling rate, by nation, 2017-21
- Packaging waste recycling
  - Graph 12: household packaging waste recycling rate, by nation, 2017-21
- Metal packaging has highest recycling rate
- Plastic waste exports continued to increase in 2023

# Waste Management & Recycling – UK – 2024

---

- Potential ban of plastic waste exports to non-OECD countries

## Waste infrastructure

- UK waste infrastructure
- The majority of waste treated at energy recovery facilities is household waste
- Significant investment in UK recycling infrastructure is vital to create a circular economy
- Defra is creating a waste infrastructure 'roadmap'
- EfW capacity continues to expand...
- ...but future development of EfW capacity is more uncertain
- Carbon capture and storage seen as critical measures to decarbonise EfW sector
- Government support for EfW with CCUS deployment
- Major EfW operators announce carbon capture plans
- Landfill capacity trends
  - Graph 12: landfill capacity trends in England, 2012-22

## Market forecast

- Total waste arisings expected to show moderate growth to 2028
  - Graph 13: forecast of waste arisings, 2024-28
- Implementation of waste reforms will help drive down household waste volumes

## Market trends

- Increased focus on boosting the UK's plastic recycling and reprocessing capability
- Recycling technology advancements
- AI innovations
- Tag and trace technology to become more important under EPR scheme
- Chemical recycling techniques

## MARKET DRIVERS

### Government waste reforms programme

- Resources and Waste Strategy for England and the Environment Act 2021
- 'Simpler Recycling' addresses some ongoing policy uncertainties
- Key announcements in "Simpler Recycling"
- Plastic Packaging Tax
- Packaging Regulations
- Producer Responsibility Obligations (Packaging Waste) Regulations
- Extended Producer Responsibility for Packaging
- Extended Producer Responsibility for Packaging (cont.)
- Packaging Waste (Data Reporting) Regulations

# Waste Management & Recycling – UK – 2024

---

- Deposit Return Scheme for drinks containers
- Government commits to municipal waste recycling targets of 65% by 2035
- The Labour party's waste and recycling policy

## WRAP's UK Plastic Pact

- UK Plastic Pact aims to create circular economy for plastics...
- ...with the pact's four targets seeking to be achieved by 2025

## Landfill tax

- Landfill tax has encouraged industry to shift to more-sustainable waste management methods
- Recent development in landfill tax rates

## COMPETITIVE LANDSCAPE

### Industry structure

- Industry development shaped by government policy
- Inconsistent policymaking has restricted investment
- 'Big five' dominate sector
- Changes in the structure of the industry
- M&A activity
- Structure by turnover
- Structure by employment

### Company profiles

- Biffa
- Biffa's divisions
- Major recent acquisitions
- Other recent acquisitions
- Strategy
- Financial performance
- Revenue by division
  - Graph 14: segmental turnover analysis of Biffa, 2022-23
- FCC Environment (UK)
- Strategy
- Financial performance
- Renewi
- Renewi's divisions
- Strategy
- Potential sale of UK municipal division

- Financial performance
- Majority of group revenue generated in Benelux
  - Graph 15: turnover analysis of Renewi, by geographic segment, 2022-23
- Suez Recycling and Recovery UK
- Veolia/Suez merger
- Strategy
- Financial performance
- Veolia Environmental Services Group (UK)
- Strategy
- Financial performance
- Viridor
- Viridor sold to private equity company KKR in 2020
- Investments in facilities
- Strategy
- Financial performance

## APPENDIX

### Supplementary data

- Construction output
  - Graph 16: construction output in Great Britain, volume, seasonally adjusted, 2017-23
- Local authority collected waste from households in England
- Packaging recycling targets
- UK population projections
  - Graph 17: UK population projections, 2000-2046

### Report scope and definitions

- Market definition
- Market definition (cont.)
- Abbreviations and Terms

### Methodology

- B2B report methodology



### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a UK licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850