

Recycling - UK - February 2017

Report Price: £995.00 | \$1236.29 | €1164.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The UK recycling industry looks set to undergo an uncertain number of years due to recent stagnation in household recycling rates - the first decline since the millennium - compounded by the recent Brexit vote and ongoing climate of austerity.”
– Marco Amasanti, B2B Analyst

This report looks at the following areas:

- What are the implications of the recent Brexit decision for the UK recycling industry?
- How can the industry look to revive the recent stagnation in household recycling rates?
- What are the key factors underlying this recent slowdown in performance?
- How have regional differences had a role in recent performance?
- How has the structure of the municipal and commercial and industrial recycling sectors changed in recent years?
- What does the future hold for the UK recycling industry?

The recycling industry has furthered growth as the UK continues its drive towards a circular economy. However, the government and industry must act fast to maintain impetus, amid an emerging trend of stagnation, by utilising a number of tools at their disposal. This cooperation is especially pertinent given the recent Brexit vote, which could challenge previous stimuli intimately tied to EU frameworks.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Recycling - UK - February 2017

Report Price: £995.00 | \$1236.29 | €1164.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

Figure 1: UK Market for Recycling, by Value, £ million, 2011/12-2015/16

Figure 2: UK Market for Recycling, by Volume, million tonnes, 2011-2015

Market factors

The UK Household Recycling Rate

Figure 3: UK Household Recycling Rates, % of waste recycled, Arisings and Recycled in '000 tonnes, 2010-2015

Geographical Differences

Figure 4: UK Countries Household Recycling Rates, % of waste recycled, Arisings and Recycled in '000 tonnes, 2010-2015

Austerity and Government Budgets

Falling Commodity Prices and Recent Recovery

Figure 5: Iron Ore Prices, US \$ per tonne, November 2011-February 2017

Market forecasts

Figure 6: UK Recycling Market Forecast, Total Waste and Recycling Volumes, million tonnes, 2017-2021

What we think

Key Insights

What impact will the recent Brexit decision have on the UK recycling industry?

In light of the recent fall in household recycling rates, what can be done to reverse this trend over the coming year?

A Change in Recycling Systems

Innovation

Regional Perspective

Taxation

Introduction

Definitions

Abbreviations

Market Positioning

UK Economy

Overview

Figure 7: UK Output, by Industry, 2008-2016, (Index 2013 = 100)

Figure 8: Quarters after GDP Peak, 1979, 1990 and 2008, (Number of Quarters and GDP as % of Pre-Downturn Peak)

Inflation

Interest rates

House prices

Figure 9: UK House Price changes, 2006-2016, (12-month % change)

Consumer spending

Manufacturing

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Recycling - UK - February 2017

Report Price: £995.00 | \$1236.29 | €1164.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: UK Manufacturing, 2014-17, (Index, 2013 = 100)

Business investment

Figure 11: UK GFCF 2005-16, (£ Million)

Imports

Exports

Market Factors

Key points

The UK household recycling rate

Figure 12: UK Household Recycling Rates, % of waste recycled, Arising and Recycled in '000 tonnes, 2010-2015

Figure 13: UK Household Recycling Rates, % of waste recycled, Arisings and Recycled in '000 tonnes, 2010-2015

Geographical differences

Figure 14: UK Countries Household Recycling Rates, % of waste recycled, Arising and Recycled in '000 tonnes, 2010-2015

Figure 15: UK Countries Household Recycling Rates, % of waste recycled, Arisings and Recycled in '000 tonnes, 2010-2015

Austerity and Government Budgets

Falling commodity prices and recent recovery

Figure 16: Iron Ore Prices, US \$ per tonne, November 2011-February 2017

Figure 17: Iron Ore Prices, US \$ per tonne, November 2011-February 2017

Market Size

Key points

Market size, by value

Figure 18: UK Market for Recycling, by Value, £ million, 2011/12-2015/16

Figure 19: UK Market for Recycling, by Value, £ million, 2011/12-2015/16

Market size, by volume

Figure 20: UK Market for Recycling, by Volume, million tonnes, 2011/12-2015/16

Figure 21: Total Waste and Recycling Volumes, million tonnes, 2011-2015

Figure 22: Total Waste and Recycling Volumes, million tonnes, 2011-2015

Market Segmentation

Key points

Municipal recycling

Figure 23: UK Municipal Waste Arisings, by Country, million tonnes, 2011/12-2015/16

Figure 24: UK Municipal Recycling Rates, by Country, %, 2011/12-2015/16

Commercial and industrial recycling

Figure 25: UK Commercial and Industrial Waste Arisings and Recycling, million tonnes and recycling rate, 2011-2015

By material

Figure 26: UK Waste materials by final treatment method, % of tonnages, 2014

Figure 27: Composition of England's household dry recycling, % of total, 2015

Industry Structure

Key points

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Recycling - UK - February 2017

Report Price: £995.00 | \$1236.29 | €1164.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Structure by employment

Figure 28: Analysis of the Employment structure of the UK Recycling industry, number of businesses, 2015 and 2016

Structure by turnover

Figure 29: Analysis of the Turnover structure of the UK Recycling industry, £000 and number of companies, 2015 and 2016

Changes in the structure of the industry

Figure 30: Analysis of the changes in the Structure of the UK Recycling industry, number of outlets and businesses, 2012-2016

Company Profiles

Biffa Group Ltd

Figure 31: Financial Analysis of Biffa Group Ltd, £ million, 2011-2015

Recent company activity

Company strategy

Cory Environmental

Figure 32: Financial Analysis of Cory Environmental, £ million, 2011-2015

Recent company activity

Company strategy

European Metal Recycling

Figure 33: Financial Analysis of European Metal Recycling, £ million, 2011-2015

Recent company activity

Company strategy

FCC Environment (UK)

Figure 34: Financial Analysis of FCC Environment UK, £ million, 2011-2015

Recent company activity

Company strategy

Metal and Waste Recycling

Figure 35: Financial Analysis of Metal and Waste Recycling, £ million, 2011-2015

Recent company activity

Company strategy

Shanks Group

Figure 36: Financial Analysis of Cory Environmental, £ million, 2012-2016

Recent company activity

Company strategy

Suez Environmental

Figure 37: Financial Analysis of Suez Environmental, £ million, 2011-2015

Recent company activity

Company strategy

Veolia

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Recycling - UK - February 2017

Report Price: £995.00 | \$1236.29 | €1164.25

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Financial Analysis of Veolia Environmental Services (UK), £ million, 2009-2013

Recent company activity

Company strategy

Forecast

Key points

The market

Figure 39: UK Recycling Market Forecast, Total Waste and Recycling Volumes, million tonnes and % change, 2017-2021

Figure 40: UK Recycling Market Forecast, Total Waste and Recycling Volumes, million tonnes, 2017-2021

Market segmentation

Figure 41: UK Recycling Market Segmentation Forecast, Total Waste & Recycling Volume and Recycling Rate, million tonnes and %, 2017-2021

The circular economy

Future frameworks from WRAP

Further Sources and Contacts

Trade associations

Trade magazines

Trade exhibitions

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com