

# Waste Management and Recycling - UK - April 2021

Report Price: £1495 | \$1995 | €1800

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

## This report looks at the following areas:

- The impact of COVID-19 on the UK waste management sector
- Financial performance of key industry players
- How the government plans to achieve its circular economy ambitions and the implications for the waste management industry
- Market drivers for investment in UK reprocessing and recycling industry

The impact of COVID-19 has seen household waste volumes rise by an estimated 8% in 2020. With more people working and studying from home, more meals and drinks consumed at home, more home deliveries and increased activities such as DIY, this has exerted an upward effect on household waste generation.

While household waste volumes rose, commercial and industrial (C&I) and construction and demolition waste volumes dropped as a result of COVID-19 in 2020. The rise in household waste has placed considerable pressure on municipal collection services, which was compounded by the closure of HWRCs during the first lockdown, as well as social distancing measures and a rise in staff absences due to COVID-19.

Local authorities have seen waste management costs increase as a result of COVID-19. The higher volumes of household waste led to higher service costs, alongside having to implement additional cleaning of vehicles and dealing with staff shortages and disruptions on collection routes. While the government has provided additional expenditure funding for local authorities during the COVID-19 crisis, councils still face a funding shortfall. This means councils may be forced to cut services, which could also affect waste and recycling services.

Defra's Resources and Waste Strategy for England, published in December 2018, is seen as a much-needed framework to reboot recycling and support the shift towards a more circular economy. While the implementation of proposed measures has been delayed by the COVID-19 crisis, the waste



"The COVID-19 outbreak has delayed progress of the government's waste and recycling reforms, which are seen as a much needed framework to reboot recycling and support the shift towards a more circular economy."

– Claudia Preedy, Senior B2B Analyst

## Buy this report now

Visit	store.mintel.com
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

Waste Management and Recycling - UK - April 2021



Report Price: £1495 | \$1995 | €1800

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

industry is well-placed to benefit from the strategy in the next few years as demand for recycling services from local authorities increases.

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Covered in this Report

### EXECUTIVE SUMMARY

- **Impact of COVID-19 on the waste management and recycling sector**

Figure 1: Short-, medium- and long-term impact of COVID-19 on waste management and recycling, 6 April 2021

- **The market**
- **COVID-19 disruption leads to a decline in total waste generation in 2020**

Figure 2: Waste arisings in the UK, by sector, 2016-20

- **Local authorities experience higher waste management costs due to COVID-19**

Figure 3: England budget revenue expenditure on waste management, net current expenditure, 2020/21

- **Shift from landfill disposal towards recycling and incineration with EfW**

Figure 4: Local authority collected waste treatment, England, '000 tonnes, 2015/16-2019/20

- **Significant investment in UK recycling infrastructure vital to creating a circular economy**
- **Companies and brands**
- **UK waste management services industry dominated by the "Big Five"**
- **Appetite for M&A activity remains**

### ISSUES AND INSIGHTS

- **Move towards circular economy drives significant investment in UK reprocessing and recycling infrastructure**
- **Sustainability becoming a key measure of business performance**

### THE MARKET – KEY TAKEAWAYS

- **Total waste volumes fall in 2020 due to COVID-19 impact**
- **England's household recycling rates see little growth**
- **Local authorities see waste management costs rise due to COVID-19**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

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

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

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

- **Just over half of English councils run a food waste collection service**
- **Significant investment in UK recycling infrastructure vital to creating a circular economy**

## WASTE ARISING

- **COVID-19 disruption leads to a decline in total waste generation in 2020**
- **Commercial and industrial waste volumes fall in 2020 as a result of COVID-19 restrictions**
- **Household waste arisings rose by an estimated 8% last year**
- **Households throw away less food during COVID-19 crisis**

Figure 5: Waste arisings in the UK, by sector, 2016-20

- **Construction output**

Figure 6: UK construction output, 2016-20

- **Household waste**

Figure 7: UK household waste arisings, by nation, 2015-19

Figure 8: Composition of waste from England households, 2019/20, (000 tonnes)

- **Composition of dry recycling from English households**

Figure 9: Composition of dry recycling from English households, % of total, 2010 and 2020

## WASTE COLLECTION

- **Local authority waste management expenditure**

Figure 10: England budget revenue expenditure on waste management, net current expenditure, 2017/18-2020/21

- **Local authority waste collection**

Figure 11: UK household residual waste collection, by frequency, 2019/20

Figure 12: Percentage of local authorities collecting each dry material, by material, 2019/20

Figure 13: Percentage of local authorities collecting each dry material, by material, 2019/20

Figure 14: UK household food waste collections, by nation, 2019/20

## WASTE TREATMENT

Figure 15: Local authority collected waste treatment, England, '000 tonnes, 2015/16-2019/20

- **Waste infrastructure**

Figure 16: Number and capacity of permitted final treatment facilities, UK and England, 2016

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

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

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

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

- **Strong expansion of EfW capacity, but uncertainty regarding future capacity additions**
- **Significant investment in UK recycling infrastructure vital to creating a circular economy**
- **Decline of landfill**  
Figure 17: Landfill capacity trends in England, 2009-19
- **Recycling rates**
- **Household waste recycling rates**  
Figure 18: UK household waste recycling rate, by nation, 2014-18
- **Packaging waste recycling rates**  
Figure 19: Packaging recycling and recovery targets, 2018-22  
Figure 20: UK packaging waste and recycling/recovery, by material, 2019 and 2020, (tonnes)
- **Issues surrounding plastic waste exports**

## MARKET FORECAST

- **Short-, medium- and long-term impact of COVID-19 on the waste management and recycling sector**  
Figure 21: Short-, medium- and long-term impact of COVID-19 on waste management and recycling, 6 April 2021
- **Market drivers and assumptions**  
Figure 22: Key economic drivers affecting MBD's market forecast, 2019-2025 (prepared on 9 March 2021)
- **Forecast methodology**
- **Forecast waste arisings**  
Figure 23: Forecast of waste arisings in the UK, 2021-25  
Figure 24: Forecast of household waste arisings in the UK (adjusted for COVID-19), 2021-25

## MARKET TRENDS

- **Technological advancements**
- **Sustainability becoming a key measure of business performance**

## THE IMPACT OF THE ECONOMY

- **UK economy contracts by record 9.9% in 2020**  
Figure 25: Annual GDP growth rate, historic and forecast, 2015- 25, (Annual % change)

## MARKET DRIVERS

- **Government proposals and actions to tackle plastic and packaging waste**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

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

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

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

- Key measures set out in Resources and Waste Strategy to be introduced through the Environment Bill
- Following years of cuts, Defra receives a funding boost between 2019 and 2022
- UK Plastic Pact aims to create circular economy for plastics
- WRAP sets out roadmap to recycle flexible plastic
- Scrutiny on plastic and packaging waste supports the need for greater domestic recycling and processing capability
- Growing issue of food waste
- Landfill tax hikes incentivise recycling and alternative ways of managing and disposing waste

Figure 26: Landfill tax rates, £ per tonne, 1st April 2017-21

## COMPANIES AND BRANDS – KEY TAKEAWAYS

- UK waste management services industry dominated by the “Big Five”
- Appetite for M&A activity remains
- Waste management companies explore carbon capture, utilisation and storage solutions for EfW plants

## INDUSTRY STRUCTURE

- Industry development
- Appetite for M&A activity remains across the waste management industry
- Changes in the structure of the industry

Figure 27: Analysis of changes in the structure of the waste management industry, number of outlets and businesses, 2016-20

- Structure by turnover

Figure 28: Analysis of the financial structure of the waste management industry, £'000 and number of businesses, 2019 and 2020

- Structure by employment

Figure 29: Analysis of the employment structure of the waste management industry, 2019 and 2020

## COMPANY PROFILES

- Biffa
- Acquisitional activity
- Investment in plastic recycling facilities
- Biffa invests in UK EfW infrastructure
- Financial performance

Figure 30: Financial analysis of Biffa Plc, 2016-20

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

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

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

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

Figure 31: Turnover analysis of Biffa, by business segment, 2020, (£ million and %)

- **Company strategy**
- **European Metal Recycling**
- **CMA orders EMR to sell sites as part of a recent acquisition**
- **EMR cuts hundreds of jobs due to impact of COVID-19**
- **Financial performance**

Figure 32: Financial analysis of European Metal Recycling, 2015-19

- **Company strategy**
- **FCC Environment (UK)**
- **Recent company activity**
- **Financial performance**

Figure 33: Financial analysis of FCC Environment (UK), 2015-19

- **Company strategy**
- **Renewi**
- **Financial performance**

Figure 34: Financial analysis of Renewi, 2016-20

Figure 35: Turnover analysis of Renewi, by business segment, 2019-20

Figure 36: Turnover analysis of Renewi, by geographic segment, 2020, (€m and %)

- **Company strategy**
- **SUEZ Recycling and Recovery UK**
- **Recent company activity in the UK**
- **Financial performance**

Figure 37: Financial analysis of SUEZ Recycling and Recovery UK, 2015-19

- **Company strategy**
- **Veolia Environmental Services (UK)**
- **Recent company activity**
- **Financial performance**

Figure 38: Financial analysis of Veolia Environmental Services (UK), 2016-19

- **Company strategy**
- **Viridor**
- **Financial performance**

Figure 39: Financial analysis of Viridor, 2016-20

- **Company strategy and outlook**

## APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Methodology**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

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

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



## FURTHER SOURCES AND CONTACTS

- Trade associations
- Trade magazines
- Trade events

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

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

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





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.