

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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



“The UK waste management industry continues to strive for sustainability in line with the gradual realisation of a circular economy. Impetus around this ambition is expected to remain despite the uncertainty introduced to policy and trade by Brexit.”
– **Marco Amasanti, B2B Analyst**

This report looks at the following areas:

- What are the key drivers behind recent growth in the waste management industry?
- How has the ongoing shift away from landfill driven growth across market sectors?
- How is the recent Brexit decision expected to impact the market? How can this be managed to ensure minimal disruption?
- In light of a recent slowdown in household recycling across the UK, how can impetus be restored to the sector?
- What does the future hold for the UK waste management industry?

Waste arisings across the UK rose for a fourth consecutive year over the past twelve months, linked primarily to the UK's improving economic landscape. However, the structure of the industry has undergone significant change, characterised by the constant striving toward a circular economy, which has seen waste treatment practices increasingly shift from landfill and incineration to the ultra-sustainability of recycle and reuse.

**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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Table of Contents

Executive Summary

Market size

Figure 1: Waste arisings in the UK, by source, million tonnes, 2012-2016

Market trends

Household recycling collection

Figure 2: UK Household residual waste collection, percentage of local authorities, by frequency, 2015/16

The move away from landfill

Figure 3: Landfill capacity in England, by site type, 2011-15

Wider structural changes to waste treatment

Figure 4: All waste at final treatment, split by method, million tonnes, UK

Market forecasts

Figure 5: UK waste arisings forecast, million tonnes, 2017-21

Household waste arisings

Figure 6: Forecast household waste arisings, million tonnes and % change, 2017-21

Ongoing shift toward a circular economy and away from landfill

Driving household recycling rates

What we think

Key Insights

What impact will the Brexit decision have on the UK waste management industry?

Technological innovations

Given the emphasis on recycling, how can the waste management industry combat stalling household recycling?

A change in recycling systems

Innovation

Regional perspective

Taxation

Introduction

Definitions

Methodology

Abbreviations

Market positioning

UK Economy

Figure 7: Forecast GDP development, % change, 2017-2021

Figure 8: UK GDP quarterly development, 2003-2016

Figure 9: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

**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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

House prices

Figure 10: UK House price changes, 12 month % change, 2006-2016

Consumer spending

Manufacturing

Figure 11: UK manufacturing, 2014-2016

Business investment

Figure 12: UK GFCF, £ million, 2003-2016

Imports

Exports

Market Factors

Key points

Outsourcing

Figure 13: Major companies share of England local council expenditure, % of total, 2015-16

Services producer price inflation

Figure 14: Services producer price indices, water supply, sewerage and waste management, 2013-2016

Waste Arisings

Key points

Total market grows by waste arisings

Figure 15: Waste arisings in the UK, by source, million tonnes, 2012-2016

Figure 16: Waste arisings proportion, % of total, 2012 and 2016

Construction and demolition waste

Figure 17: Construction and demolition waste arisings, million tonnes and % change, 2012-2016

Figure 18: Output in the Construction Industry, by Type, 2010-2016

Household waste

Figure 19: Household waste arisings, by nation, million tonnes, 2012-2016

Commercial waste

Figure 20: Commercial waste arisings, million tonnes and % change, 2012-2016

Figure 21: Composition of Commercial and Industrial waste arisings, by sector, tonnes, 2014

Industrial waste

Figure 22: Industrial waste arisings, million tonnes and % change, 2012-2016

Mining and quarrying

Figure 23: Mining and quarrying waste arisings, million tonnes and % change, 2012-2016

Sewage sludge

Figure 24: Sewage sludge waste arisings, million tonnes and % change, 2012-2016

Hazardous waste

Figure 25: Hazardous waste arisings, million tonnes and % change, 2012-2016

Figure 26: Hazardous waste arisings, by sector, tonnes, 2014

Figure 27: Composition of Hazardous waste arisings, by industry sector, tonnes, 2014

**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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Collection

Key points

Household

Local authority operations

Figure 28: UK Household, percentage of local authorities operating dry recycling schemes, 2015/16

Figure 29: UK Household residual waste collection, percentage of local authorities, by frequency, 2015/16

Figure 30: Composition of England Household waste, million tonnes, 2010-2015

Figure 31: England local authority collected household waste, by material, '000 tonnes, 2010-2014

Defra prevention initiatives

Commercial and industrial

Figure 32: Analysis of the collection of commercial and industrial waste in the UK, by sector, million tonnes, 2016

Waste Treatment

Key points

The market

Figure 33: All waste at final treatment, split by method, million tonnes, UK

Decline of landfill

Figure 34: Landfill capacity in England, by site type, '000 cubic metres, 2011-15

Commercial and industrial

Figure 35: Estimate of total C&I waste and subsector totals, England, '000 tonnes, 2003 & 2009

Construction and demolition

Figure 36: Recovery rate from non-hazardous construction and demolition waste, UK, '000 tonnes and %, 2010-2014

Municipal Waste Disposal

Key points

Municipal recycling

Figure 37: UK Municipal Waste Arisings, by Country, million tonnes, 2011/12-2015/16

Figure 38: UK Municipal Recycling Rates, by Country, %, 2011/12-2015/16

The UK household recycling rate

Figure 39: UK Household Recycling Rates, % of waste recycled, Arising and Recycled in '000 tonnes, 2010-2015

Figure 40: UK Household Recycling Rates, % of waste recycled, Arisings and Recycled in '000 tonnes, 2010-2015

Geographical differences

Figure 41: UK Countries Household Recycling Rates, % of waste recycled, Arising and Recycled in '000 tonnes, 2010-2015

New waste facilities infrastructure scaled back as residual waste treatment gap closes

Hazardous Waste Disposal

Key points

The technologies used to treat hazardous waste include high temperature incineration, thermal

Figure 42: Hazardous waste arisings, by nation, tonnes, 2015

Figure 43: UK Hazardous waste deposits, by disposal and recovery options, tonnes, 2011-2015

Figure 44: UK Hazardous waste deposits, by disposal and recovery options, tonnes, 2015

**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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Licences

Key points

Figure 45: Output in the Construction Industry, by Type, 2010-2016

2017 budget

The Landfill Communities Fund (LCF)

Environmental Body Levy

Devolution of Landfill Tax to Wales

Landfill Disposal

Key points

Figure 46: Municipal Waste and BMW to Landfill, by nation, '000 tonnes, 2011-15

The Landfill Directive

New measures

Figure 47: Landfill tax rate changes, April 2016-2018

Impetus expected to remain despite Brexit

Incineration

Key points

Figure 48: England Incineration capacity, by sector, '000 tonnes, 2015

Figure 49: England Incineration capacity, by sector, '000 tonnes, 2015

Fuel

Key points

Renewables Obligation (RO) drives investment in renewables generation capacity

Producer Responsibility Obligations

Key points

UK expected to remain committed to previous models

Packaging

Figure 50: UK Government packaging recycling targets, %, 2014-2017

WEEE

Figure 51: WEEE collected in the UK, tonnes, Q1 2017

Batteries

Figure 52: Portable batteries placed on the UK market, 2012-15, '000 tonnes, and waste batteries collected and treated, tonnes, 2015

Vehicles

Figure 53: Total recycling and reuse rate of end-of-life vehicles, % of total, 2010-14

Glass

Key points

Figure 54: UK Glass packaging waste and recycling/recovery, '000 tonnes and %, 2014

Cans

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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Figure 55: UK Steel packaging waste and recycling/recovery, '000 tonnes and %, 2014

Figure 56: UK Steel packaging waste and recycling/recovery, '000 tonnes and %, 2014

Paper

Key points

Figure 57: UK Paper and cardboard packaging waste and recycling/recovery, '000 tonnes and %, 2014

Plastics

Key points

Figure 58: UK Plastic packaging waste and recycling/recovery, '000 tonnes and %, 2014

Oils, Chemicals and Solvents

Key points

Figure 59: Analysis of Oil and oil/water mixtures waste deposits handled and treated/landfilled in England, tonnes, 2010-14

Textiles

Domestic Metal Recycling

Key points

Figure 60: Metal recycling of waste in England and Wales, '000 tonnes and % change, 2010-2015

International Metal Recycling

Key points

Figure 61: De-pollution of Vehicles in England and Wales, '000 tonnes and % change, 2010-14

Global commodity prices

Figure 62: Iron ore prices, US \$ per tonne, November 2011- February 2017

Compost

Key points

Initiatives and framework

Figure 63: Composting of waste in England and Wales, '000 tonnes and % change, 2011-2015

Figure 64: Biological treatment of waste in England and Wales, '000 tonnes and % change, 2011-2015

Food Waste

Key points

Food waste

Figure 65: UK food waste arisings, by sector, '000 tonnes, 2014

Household

Figure 66: Household food and drink waste in the UK, '000 tonnes, 2007, 2010, 2012, 2014-2015

Commercial and Industrial

Tyres

Key points

Government Waste Expenditure

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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Figure 67: England budget revenue expenditure, net current expenditure, by service, £'000. 2016-17

Figure 68: England budget revenue expenditure, net current expenditure, by service, £ million. 2016-17

Figure 69: England local authority budget, by local authority classification, revenue expenditure, 2016-17

Industry Structure

Key points

Industry development

Mergers and acquisitions

Industry structure

Changes in the Structure of the Industry

Figure 70: Analysis of the changes in the Structure of the Waste Management Industry, 2012-2016, (Number of Outlets and Businesses)

Structure by employment

Figure 71: Analysis of the Employment Structure of the Waste Management Industry, 2015 & 2016

Structure by turnover

Figure 72: Analysis of the Financial Structure of the Waste Management Industry, 2015 & 2016. (£000 and Number of Businesses)

Company Profiles

Biffa Group Limited

Figure 73: Financial Analysis of Biffa Group Ltd, £ million, 2011-2015

Recent company activity

Company strategy

Biffa Waste Services

Figure 74: Financial Analysis of Biffa Waste Services, £ million, 2012-2016

Company strategy

Cory Environmental

Figure 75: Financial Analysis of Cory Environmental, £ million, 2011-2015

Recent company activity

Company strategy

FCC Environment (UK)

Figure 76: Financial Analysis of FCC Environment UK, £ million, 2011-2015

Recent company activity

Company strategy

MRS Environmental Services

Figure 77: Financial Analysis of MRS Environmental Services, £ million, 2011-2015

Company strategy

Shanks Group

Figure 78: Financial Analysis of Shanks Group, £ million, 2011-2015

Recent company activity

Company strategy

**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

Waste Management and Recycling - UK - June 2017

Report Price: £995.00 | \$1288.43 | €1182.46

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

Suez Environmental

Figure 79: Financial Analysis of Suez Environmental, £ million, 2011-2015

Recent company activity

Company strategy

UK Waste Management

Figure 80: Financial Analysis of UK Waste Management, £ million, 2012-2016

Company strategy

Veolia

Figure 81: Financial Analysis of Veolia Environmental Services (UK), £ million, 2009-2013

Recent company activity

Company strategy

Viridor

Figure 82: Financial Analysis of Viridor, £ million, 2012-2016

Recent company activity

Company strategy

Forecast

Key points

Waste arisings

Figure 83: UK waste arisings forecast, million tonnes and % change, 2017-21

Figure 84: UK waste arisings forecast, million tonnes, 2017-21

Household waste arisings

Figure 85: Forecast household waste arisings, million tonnes and % change, 2017-21

Figure 86: Forecast household waste arisings, million tonnes and % change, 2017-21

Ongoing shift from landfill

Driving household recycling rates

All households to be able to recycle the same core set of materials

Fewer collection and sorting systems

Common container colour system

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