

## Waste Management and Recycling - UK - June 2018

Report Price: £995.00 | \$1343.55 | €1119.77

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



“The UK continues to edge towards a more circular economy, marked by huge growth in energy-from-waste and the move away from landfill. However, energy-from-waste capacity remains somewhat off that required to ultimately replace landfill, while the UK continues to rely on EU exports to fulfill this deficit; a relationship that could face great upheaval in the coming years.”

– **Marco Amasanti, B2B Analyst**

This report looks at the following areas:

- What impact has the Brexit vote had on the market?
- How have waste trajectories changed over the past year?
- What have been the drivers of market activity in the past year?
- What does the future look like for the waste management industry?

In recent years, much of the growth in waste management has been underpinned by EU directives, which have aimed to reduce the use of landfill by increasing material recovery, whether through recycling, composting or energy-from-waste.

However, as a result of the UK's decision to leave the EU there is now a great deal of uncertainty around future environmental policy. This has been compounded by Chinese import restrictions, and in the case of England, ongoing budgeting pressures among local authorities.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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 2018

**Report Price:** £995.00 | \$1343.55 | €1119.77

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

## Table of Contents

### Executive Summary

#### Waste arisings

Figure 1: Waste arisings in the UK, by sector, 2013-2017

#### Waste collection

Figure 2: England budget revenue expenditure on waste management, net current expenditure, 2017/18

#### Waste treatment

Figure 3: Local authority collected waste treatment, England, '000 tonnes, 2012/13-2016/17

#### Market factors

Mounting scrutiny on plastic waste

Growing issue of food waste

#### Market forecast

Figure 4: Forecast for waste arisings in the UK, 2018-2022

#### What we think

### Key Issues

Chinese bans certain waste imports

Piling the pressure on the UK waste industry

EU considers new regulation on plastics

Brexit uncertainties

Recycling framework

Trade difficulties

Future strategy

### Introduction

Definitions

Methodology

Abbreviations

Market positioning

### Market Factors

Mounting scrutiny on plastic waste

Growing issue of food waste

Figure 5: UK household food waste collections, by nation, 2016/17

### Waste Arisings

Waste generation continues to grow across all sectors

Figure 6: Waste arisings in the UK, by sector, 2013-2017

Construction output

Figure 7: UK Construction output, 2013-2017

Household waste

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Waste Management and Recycling - UK - June 2018

Report Price: £995.00 | \$1343.55 | €1119.77

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

Figure 8: UK household waste arisings, by nation, 2013-2017

Figure 9: Composition of waste from England households, 2017

Figure 10: Composition of dry recycling from English households, million tonnes, 2017

## Waste Collection

Figure 11: England budget revenue expenditure on waste management, net current expenditure, 2017/18

### Local authority waste collection

Figure 12: UK household residual waste collection, by frequency, 2016/17

## Waste Treatment

Figure 13: Local authority collected waste treatment, England, '000 tonnes, 2012/13-2016/17

### Waste infrastructure

Figure 14: Number and capacity of permitted final treatment facilities, UK and England, 2014

### Decline of landfill

Figure 15: Landfill capacity trends in England, 2006-2016

### Recycling rates

Figure 16: UK household waste recycling rate, by nation, 2013-2017

## Industry Structure

### Key points

### Industry development

Figure 17: Analysis of the changes in the structure of the waste management industry, number of outlets and businesses, 2013-2017

### Structure by turnover

Figure 18: Analysis of the financial structure of the waste management industry, £'000 and number of businesses, 2016 and 2017

### Structure by employment

Figure 19: Analysis of the employment structure of the waste management industry, 2016 and 2017

## Company Profiles

### Biffa

#### Recent company activity

Figure 20: Financial analysis of Biffa Plc, 2016-2017

Figure 21: Financial analysis of Biffa Waste Services, 2013-2017

#### Company strategy

### FCC Environment (UK)

#### Recent company activity

Figure 22: Financial analysis of FCC Environment (UK), £ million, 2012-2016

#### Company strategy

### Renewi

#### Recent company activity

Figure 23: Financial analysis of Renewi, £ million, 2013-2017

#### Company strategy

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Waste Management and Recycling - UK - June 2018

Report Price: £995.00 | \$1343.55 | €1119.77

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

### SUEZ Environmental

Recent company activity

Figure 24: Financial analysis of SUEZ Environmental, 2012-2016

Company strategy

### Veolia

Recent company activity

Company strategy

### Viridor

Recent company activity

Figure 25: Financial analysis of Viridor, 2013-2017

Company strategy

### Market Forecast

Figure 26: Forecast of waste arisings in the UK, 2018-2022

Figure 27: Forecast of household waste arisings in the UK, 2018-2022

Market trends

Figure 28: Central government own expenditure on waste management, 2016/2017-2019/2020

Figure 29: UK recycling market forecast value, 2018-2022

Technological advancements

### Further Sources and Contacts

Trade magazines

Trade Exhibitions

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)