

# Waste Management and Recycling - UK - 2023

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## 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.

The government has set a target to recycle 65% of municipal waste by 2035. This represents a massive increase from current levels, with the official England 'waste from households' recycling rate at 44.1% in 2021/22. To meet this ambitious target, significant investment in the UK recycling infrastructure is required.

Waste management companies and local authorities have been impacted by rising fuel prices and soaring inflation, which has increased cost pressures. In response to surging costs, a number of councils have reduced opening hours at Household Waste and Recycling sites, although there is no evidence yet of cuts to kerbside waste collection services.

An ongoing lack of clarity over the final design of key measures of the government's waste reforms, including consistency in recycling collections and food waste collections, means that required investment in the UK recycling and reprocessing infrastructure remains on hold. This may delay the move to a more circular economy.

Despite the ongoing uncertainty, the waste management industry has committed considerable capital investment to develop the UK's plastic recycling and reprocessing capability. Growing demand for recycled materials underpins investment in recycling technology. 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



"The commitment to a more circular economy, underpinned by the implementation of major waste reforms, will be central to developments in the waste management and recycling market over the coming years."

– Claudia Preedy, Principal Analyst

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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.

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