

Sustainable Waste Management



Waste: a global resource

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The waste business is fast becoming the resources business. Our job is becoming one of preventing waste, putting it back to work, or gaining value – including energy – from what's left over. We have to think in a global sense but must also maintain an essential service to protect people and the environment locally.

One of the biggest policy challenges we have ever faced according to governments around the world is carbon and climate-change impact. Waste management contributes around three per cent of the UK's impact but our real contribution is potentially much greater through influencing better resource management of materials, products, and services through the whole cycle and through fossil-fuel replacement.

The focus of this industry is therefore shifting from efficient storage, removal and disposal to alternative approaches involving waste collection, transport and treatment technologies designed to prevent or re-work waste. This needs investment – in new infrastructure, which needs new technologies (new to the UK at least), that in turn need new skills or new entrants to the market.

Changes are being driven by recognition of the importance of local and global environment protection, at both a domestic and European level. The Landfill Directive is quickly reducing access to landfill for many wastes, especially for hazardous or specialist wastes, such as plasterboard. It is also driving up engineering and operational standards, and therefore the gate fees. The number of merchant landfills is reducing, so transport costs to the remaining sites are increasing. The Article 9 pre-treatment requirement for landfilled waste starts to bite in October 2007, and coupled with a £48 per tonne landfill tax by 2010 and LATS / LAS fines of £150 per tonne for un-diverted Biodegradable Municipal Solid Wastes – failure to act looks unattractive.

As waste matters more, action will take a number of forms. Businesses, including priority sectors like construction,

demolition and food and drink, need to cut their wastes. They need to pre-treat their wastes, find non-landfill solutions for them and shoulder greater regulatory responsibilities like an enhanced Duty of Care or Site Waste Management Plans. Advice on how to do this from waste managers will form part of what must become a value-added service from our sector. Others are about to pick up new producer responsibilities like WEEE or batteries, or will want to demonstrate good environmental performance as a competitive edge.

Within our industry, rising costs will make non-landfill solutions much more attractive. The landfill tax message in the 2007 budget is enough to show that, by 2010, landfill could cost in the region of £70 to £80 per tonne. This is enough to plan new infrastructure development against shifting behaviours, whilst giving businesses time to change established arrangements. Other actual or perceived barriers are getting knocked down too. Defra's New Technologies Demonstration Program plants are springing up. Anyone needing to see these technologies in action will be able to do so and specialised education programs leading to qualifications in the technologies will be available. Financial institutions and the construction industry are also showing clear interest in the development of new infrastructure, often quoted as needing £10bn investment in the next five years.

We have a new Waste Strategy for England to look forward to in mid-2007. It will underline the environmental and economic importance of breaking old waste-management habits, show leadership for changes in how we see and manage our wastes as resources and, hopefully, accelerate those changes. We still need to invest in better facilities to treat our wastes after recycling and reduction, before the real residues can be landfilled. Unpopular as this may be, this will have to include recovery of energy from post-recycling wastes through a variety of means. A Government Energy White Paper should accompany the English Waste Strategy, and we need to see clear policy links between the two,

something sorely missing at the Energy Review/Strategy consultation stage. We also need to see clear signals that we should plan and provide for waste-treatment plants which cater for wastes from municipal and industrial/commercial sources and which encourage strategic partnership between different local authorities, public and private sectors.

In the UK our industry is currently worth around \$15bn per year. This could double from its current 0.5 per cent share of GDP to meet near-European values. Global waste production has topped 2.5bn tonnes per year and is set to rise quickly as major world economies grow. UK waste and resources businesses therefore have a unique opportunity: they have to develop the skills, technologies and infrastructure just to meet UK and European targets, and have an opportunity to market these skills and technologies through a global waste market whose municipal business in OECD countries alone is valued at over \$120bn per year.

Other changes in the air include the permitting regime, set to change in spring 2008, including how technical competence and compliance will be determined. The Waste Framework Directive Review won't be completed during the German EU Presidency, but will continue apace, as will work under the review to look at what is, and is not, a waste. Markets for materials will continue to mature, and work will continue within the UK to develop quality protocols for the outputs from waste treatments to satisfy those markets, at home and overseas. No corner of the sector will stay untouched.

Meanwhile, higher up the media flagpole than ever, our industry, our performance, and our decisions are under the spotlight - because they matter. Waste has hit the boardroom and the bar room as an important talking point. We have to influence the world around us, from Government departments and Europe, through to businesses big and small, and people in their own homes. The future looks like hard work – but one well worth working for. ●