

**NORTH LONDON WASTE AUTHORITY**

**REPORT TITLE:** SERVICES UPDATE

**REPORT OF:** HEAD OF STRATEGY AND SERVICES

**FOR SUBMISSION TO:** AUTHORITY MEETING

**DATE:** 9 OCTOBER 2025

**SUMMARY OF REPORT:**

This report informs Members about the latest operational activities, details of the tonnages of the various waste streams managed by the Authority, and updates on specialist recycling initiatives.

**RECOMMENDATIONS:**

The Authority is recommended to note the operational, performance and recycling updates provided.

**Signed:** .....  ..... Head of Strategy and Services

**Date:** 29 September 2025

## 1. BACKGROUND

- 1.1. This report provides Members with an update of service activity since the April Authority meeting and provides tonnage data and performance information for the period April to August 2025/26 unless otherwise specified.

## 2. ABOUT NLWA'S SERVICES

- 2.1. North London Waste Authority (NLWA) provides disposal services for municipal residual waste and recycling for all seven of its constituent boroughs (Barnet, Camden, Enfield, Hackney, Haringey, Islington and Waltham Forest). Waste disposal services are mainly delivered through a contract with LondonEnergy Ltd (LEL), which is owned by NLWA, with Dry Mixed Recycling (DMR) being treated locally under contract with Biffa.
- 2.2. The constituent boroughs collect just over 750,000 tonnes of waste and recycling a year, of which circa 675,000 tonnes is from households. NLWA's aim is to preserve the resources and the environment today and for future generations. NLWA is committed to innovation and careful planning to ensure waste resources are managed effectively and sustainably.

## 3. WASTE PERFORMANCE

### Residual waste excluding Reuse and Recycling Centres (RRCs)

	(A) 2024/25 actual YTD (Apr-Aug)	(B) 2025/26 budget YTD (Apr-Aug)	(C) 2025/26 actual YTD (Apr-Aug)	(C-B) Variance 2025/26 actual v budget (t)	(C-B) Variance 2025/26 actual v budget (%)	(C-A) Variance actual 25/26 v 24/25 (t)	(C-A) Variance actual 25/26 v 24/25 (%)
Barnet	45110	46018	44349	-1670	-3.6%	-761	-1.7%
Camden	29110	29050	28891	-159	-0.5%	-219	-0.8%
Enfield	37485	37499	35906	-1593	-4.2%	-1579	-4.2%
Hackney	42139	36839	36122	-717	-1.9%	-6017	-14.3%
Haringey	29237	29237	28998	-239	-0.8%	-239	-0.8%
Islington	28541	28831	28018	-813	-2.8%	-523	-1.8%
Waltham Forest	28399	25735	24045	-1690	-6.6%	-4354	-15.3%
<b>NLWA total</b>	<b>240020</b>	<b>233209</b>	<b>226328</b>	<b>-6881</b>	<b>-3.0%</b>	<b>-13692</b>	<b>-5.7%</b>

Table 1: Collected Residual Waste excl. RRC tonnage

- 3.1. Table 1 above shows that residual waste tonnages are 3.0% below budget for the first five months of 2025/26 and 5.7% below 2024/25 tonnages over the same period. This is partly due to the London Borough of Waltham Forest's shift to fortnightly residual collections, which has reduced residual tonnages more than expected. Some boroughs were anticipating an increase in residual waste due to housing growth, but this has not yet materialised with all boroughs experiencing a welcome reduction in residual tonnages compared to 2024/25. The drop may partly reflect increased food waste collections, although gains in food waste are relatively small compared to the fall in residual waste (see table 3). The 2025/26

YTD data reflects a broader five-year trend of relatively stable tonnages (see figure 1 below).

- 3.2. During 2024/25, the London Borough of Hackney collected circa 20,000 tonnes of commercial waste from contracts based in East London and Essex. These contracts ended at the beginning of 2025/26 and subsequently, LB Hackney's residual tonnages have reduced by 14% compared to the same period last year and are closer to 2023/24 numbers (35,745 tonnes).

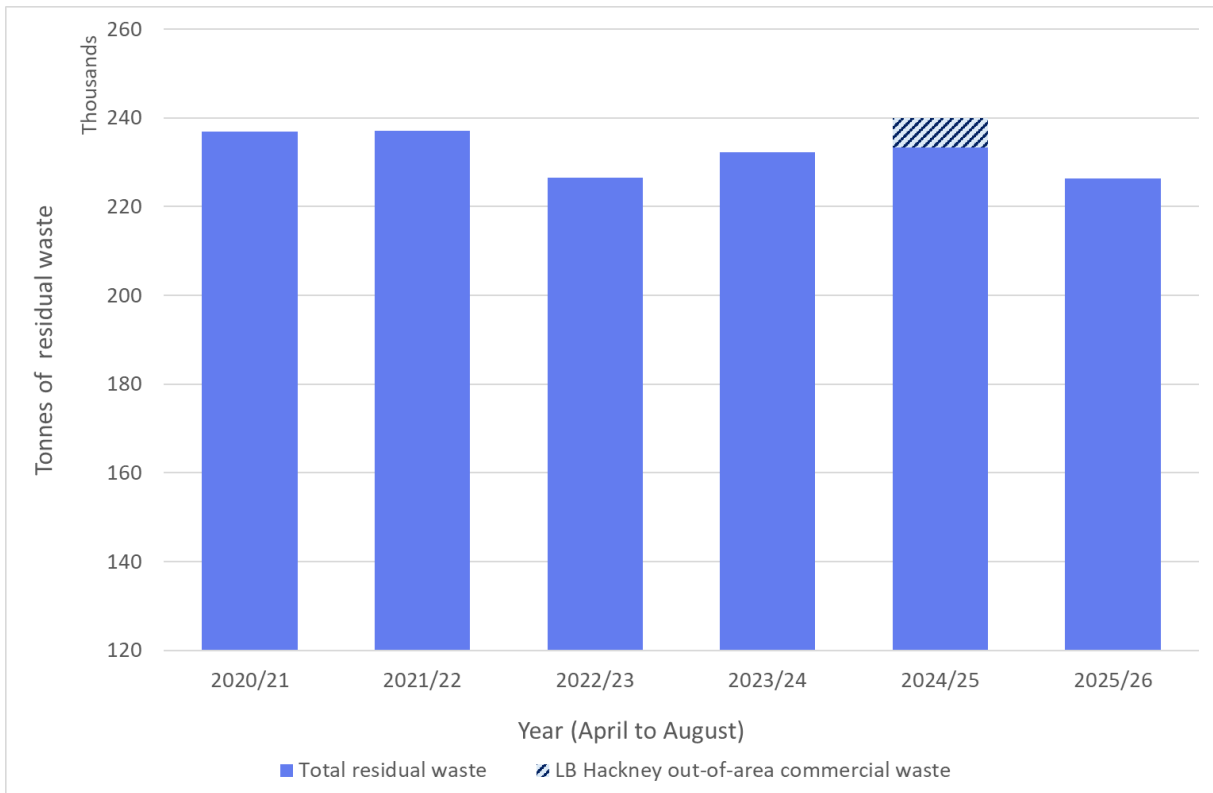


Figure 2: NLWA total residual waste tonnages for the period April to August overtime

## Dry Mixed Recycling (DMR)

	(A) 2024/25 actual YTD (Apr-Aug)	(B) 2025/26 budget YTD (Apr-Aug)	(C) 2025/26 actual YTD (Apr-Aug)	(C-B) Variance 2025/26 actual v budget (t)	(C-B) Variance 2025/26 actual v budget (%)	(C-A) Variance actual 25/26 v 24/25 (t)	(C-A) Variance actual 25/26 v 24/25 (%)
Barnet	10603	10762	10432	-329	-3.1%	-170	-1.6%
Camden	6668	6735	6606	-128	-1.9%	-62	-0.9%
Enfield	7281	7281	7670	389	5.3%	389	5.3%
Hackney	7014	7014	7045	31	0.4%	31	0.4%
Haringey	6861	6930	6871	-59	-0.8%	10	0.1%
Islington	5981	6040	5831	-210	-3.5%	-150	-2.5%
Waltham Forest	7120	7333	7971	638	8.7%	851	12.0%
<b>NLWA total</b>	<b>51527</b>	<b>52095</b>	<b>52427</b>	<b>332</b>	<b>0.6%</b>	<b>900</b>	<b>1.7%</b>

Table 3: Collected Dry Mixed Recycling

- 3.3. Table 2 shows that for the first five months of 2025/26, overall DMR tonnages are close to budget and slightly above 2024/25 tonnages. Excluding those that have experienced service changes, boroughs have typically seen DMR tonnages remain constant over the past few years.
- 3.4. Whilst the overall picture is close to forecast, there is some variation between boroughs. LB Waltham Forest is benefiting from the introduction of fortnightly residual waste collections and has seen a greater increase in DMR tonnages than anticipated for the first five months of the year (8.7% above budget).

## Organic waste streams

	(A) 2024/25 actual YTD (Apr-Aug)	(B) 2025/26 budget YTD (Apr-Aug)	(C) 2025/26 actual YTD (Apr-Aug)	(C-B) Variance 2025/26 actual v budget (t)	(C-B) Variance 2025/26 actual v budget (%)	(C-A) Variance actual 25/26 v 24/25 (t)	(C-A) Variance actual 25/26 v 24/25 (%)
Food waste	8564	11093	11380	287	2.6%	2817	32.9%
Garden waste	12962	16070	13737	-2333	-14.5%	775	6.0%
<b>Total kerbside organics</b>	<b>21526</b>	<b>27163</b>	<b>25117</b>	<b>-2046</b>	<b>-7.5%</b>	<b>3592</b>	<b>16.7%</b>
Food waste excl. Waltham Forest	8358	8478	8568	90	1.1%	209	2.5%
Garden waste excl. Waltham Forest	12903	12990	10501	-2489	-19.2%	-2402	-18.6%
<b>Total kerbside organics excl. Waltham Forest</b>	<b>21261</b>	<b>21468</b>	<b>19068</b>	<b>-2400</b>	<b>-11.2%</b>	<b>-2193</b>	<b>-10.3%</b>

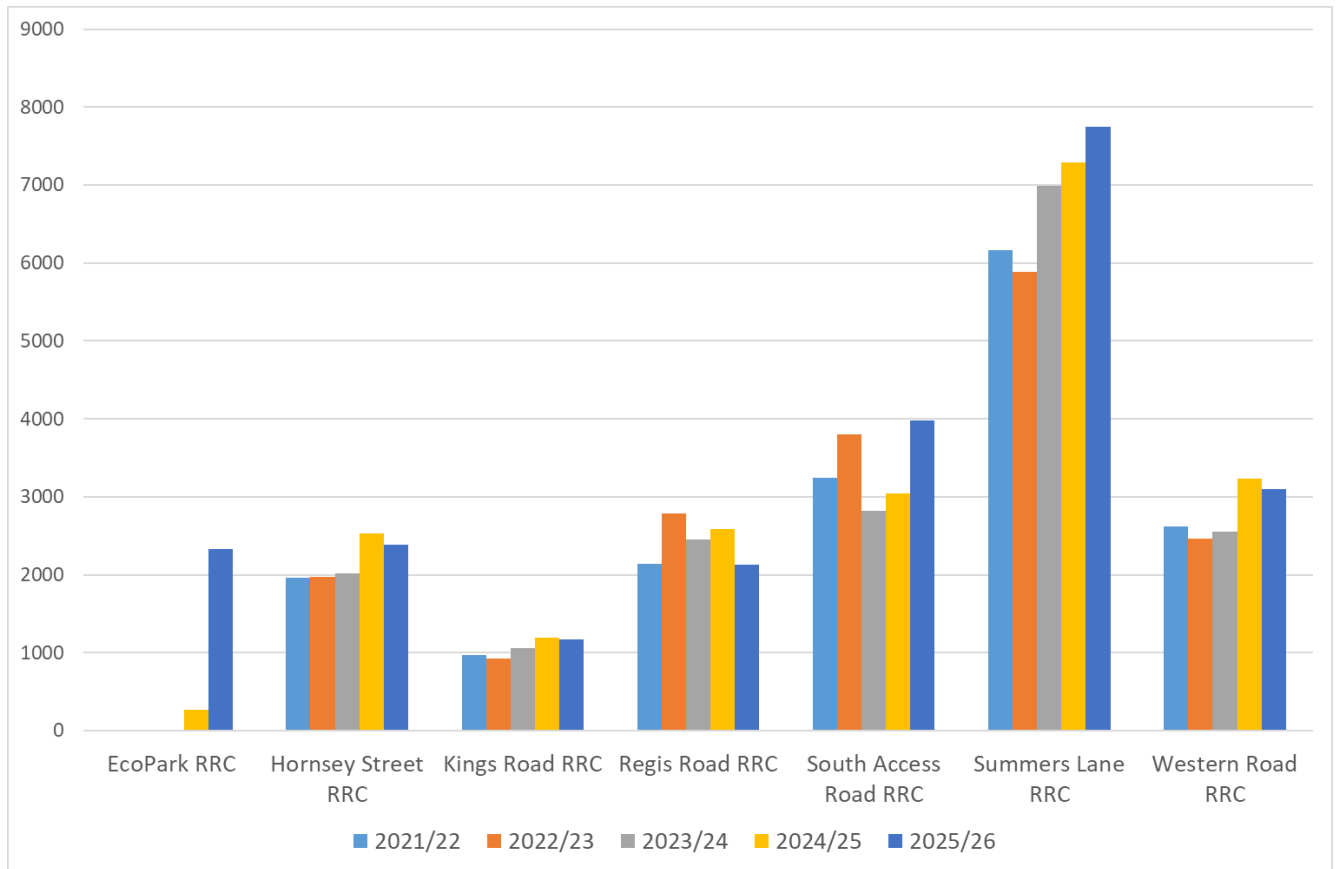
Table 4: Collected Organics (Food Waste and Garden Waste)

- 3.5. Table 3 shows actual food waste and garden waste performance in 2025/26 YTD (April to August) against budget and 2024/25 tonnages.
- 3.6. LB Waltham Forest introduced separate food and garden waste collections in Autumn 2024 and prior to this was co-collecting these materials as BioK (mixed green and food waste). Excluding LB Waltham Forest's 'new' tonnage, table 3

shows a reduction in garden waste tonnages for the period April to August 2025/26 compared to the same period last year. Hot and dry weather conditions early in the financial year have resulted in fewer garden waste arisings than in 2024/25.

- 3.7. Excluding LB Waltham Forest, food waste tonnages are just 90 tonnes above budget. Most boroughs have seen a slight increase in food waste at the start of 2025/26, contributing to a 2.6% increase overall compared to 2024/25. This is likely driven by the expansion of food waste collections to businesses, estates and Flats Above Shops (FLASH) properties in preparation for Simpler Recycling. With boroughs rolling out expanded food waste services at different times ahead of the 1 April 2026 government deadline, tonnages will likely fluctuate throughout the year. Food waste tonnages in LB Waltham Forest for April to August 2025/26 are 8% above budget at 2812 tonnes.

## REUSE AND RECYCLING CENTRE (RRC) TONNAGES



*Figure 2: Tonnes of waste collected across the seven RRCs over time for the period April to August*

- 3.8. Figure 2 above shows variations in RRC tonnages year-to-date (April to August 2025/26) compared to the same period last year. EcoPark RRC opened in July 2024, and although tonnages steadily ramped up over the remainder of its first year of operation they do not provide a direct comparison with April to August 2025/26.
- 3.9. Excluding the circa 2,000 tonne increase at EcoPark RRC, overall RRC tonnage have increased by 3% in 2025/26 compared to the same period in 2024/25. However, there is variation between sites which likely stems from borough service changes. The introduction of Chargeable kerbside garden waste collections in some boroughs boosted garden waste tonnages at our RRC's in 2024/25. As expected, the surge we experienced last year at RRCs has now levelled off with the start of a new subscription year and resident sign-ups stabilising. Lower garden waste tonnages also reflect the dry weather conditions experienced this year.
- 3.10. Total Tonnes (all waste streams) at South Access Road are up 31% compared to 2024/25, likely driven by the closure of nearby Gateway Road RRC in November 2024 and changes to kerbside collections.

#### **4. RECYCLING UPDATE**

- 4.1. The Biffa contract currently achieves a 79% recycling rate for all delivered materials (including all rejected materials and process loss). The remaining 21% of non-recyclable material is processed as Refuse Derived Fuel (RDF). Work is ongoing with Biffa and borough officers to reduce contamination in Dry Mixed Recycling (DMR) this includes regular inspection of the testing and monitoring process deployed by Biffa and the development of an ambitious outreach and communications programme aimed at targeting the worst performing collection rounds in each Borough. A detailed composition analysis will inform future contamination-reduction campaigns at both authority-wide and borough levels.
- 4.2. A battery and vape disposal campaign is scheduled for Autumn 2025, aiming to reduce fire incidents at waste facilities by encouraging residents to remove these hazardous items from household bins.
- 4.3. Biffa is progressing with its investment programme to upgrade the Edmonton materials recycling facility, integrating advanced sorting technologies to maintain efficiency and deliver value for money. Key works milestones already completed in June 2025 include:
  - 4.3.1. Installation of a robotic picker at quality control stations
  - 4.3.2. Replacement of the main in-feed conveyor
  - 4.3.3. Upgrade of the OCC (old corrugated cardboard) line to separate cardboard from mixed paper
  - 4.3.4. Installation of a new screen to improve cardboard capture
- 4.4. The impact of these works is expected to filter through in quarters three and four of this year. Officers will continue to monitor and report on the remaining improvement works, which include:
- 4.5. Works currently underway or to begin in 2025/26 include;
  - 4.5.1. Upgrade to Line C to enhance fibre (paper and card) and coloured plastic extraction.
  - 4.5.2. The Paper clean-up project which will introduce options for news & PAM (Periodicals and Magazines) to be separated into different fibre grades to help with saleability and finding UK destination.
  - 4.5.3. Upgrade of the m-OPS (multi-optical system), will assist in the capture of coloured plastic bottles, tubs and tray for material capture as an alternative to back-end extraction before RDF production.

## Destinations update

Material	Baseline March 2020			Q1 25/26		
	UK	Europe	Far East	UK	Europe	Far East
Cardboard			100%	9%	40%	51%
Mixed Paper	43%	19%	38%	0%	100%	0%
Glass	68%	32%		100%	0%	0%
Aluminium Cans	100%			98%	2%	0%
Steel Cans	100%			100%	0%	0%
Plastic Bottles	100%			100%	0%	0%
Other Plastics	100%			100%	0%	0%

*Table 5: Dry Mixed Recyclables End Destinations*

- 4.6. The Authority is working with Biffa to process all DMR materials within the UK by 2030. As part of the extension Biffa suggested 100% of paper could be recycled within the UK albeit this was subject to improvements in UK reprocessing capacity, which have yet to materialise. Biffa are continuing to push for a UK solution for paper in a currently shrinking UK market. The table above compares data for Quarter 1 (Q1) 2025/26 to the March 2020 baseline.
- 4.7. The data reveals significant shifts in the destination markets for fibre materials. These shifts reflect broader trends in global recycling markets, influenced by policy changes, economic conditions, and logistical challenges. Domestic demand in the UK for mixed paper has weakened due to reduced production at paper mills. Europe, however, has seen a resurgence in demand, mainly due to EU legislation that requires a higher percentage of recycled materials in new products.
- 4.8. While the UK retains strong domestic processing capacity for glass, metals and plastics, it is losing capacity for fiber-based materials. In Europe capacity to process fibre is increasing to meet statutory requirements for new products. The Far East market is also selectively reengaging and providing capacity for high-value, low-contamination streams like cardboard. These shifts underscore the importance of material quality, improved infrastructure and capacity with appropriate policies to stimulate capacity growth in the UK.



## 5. COMMODITY PRICES

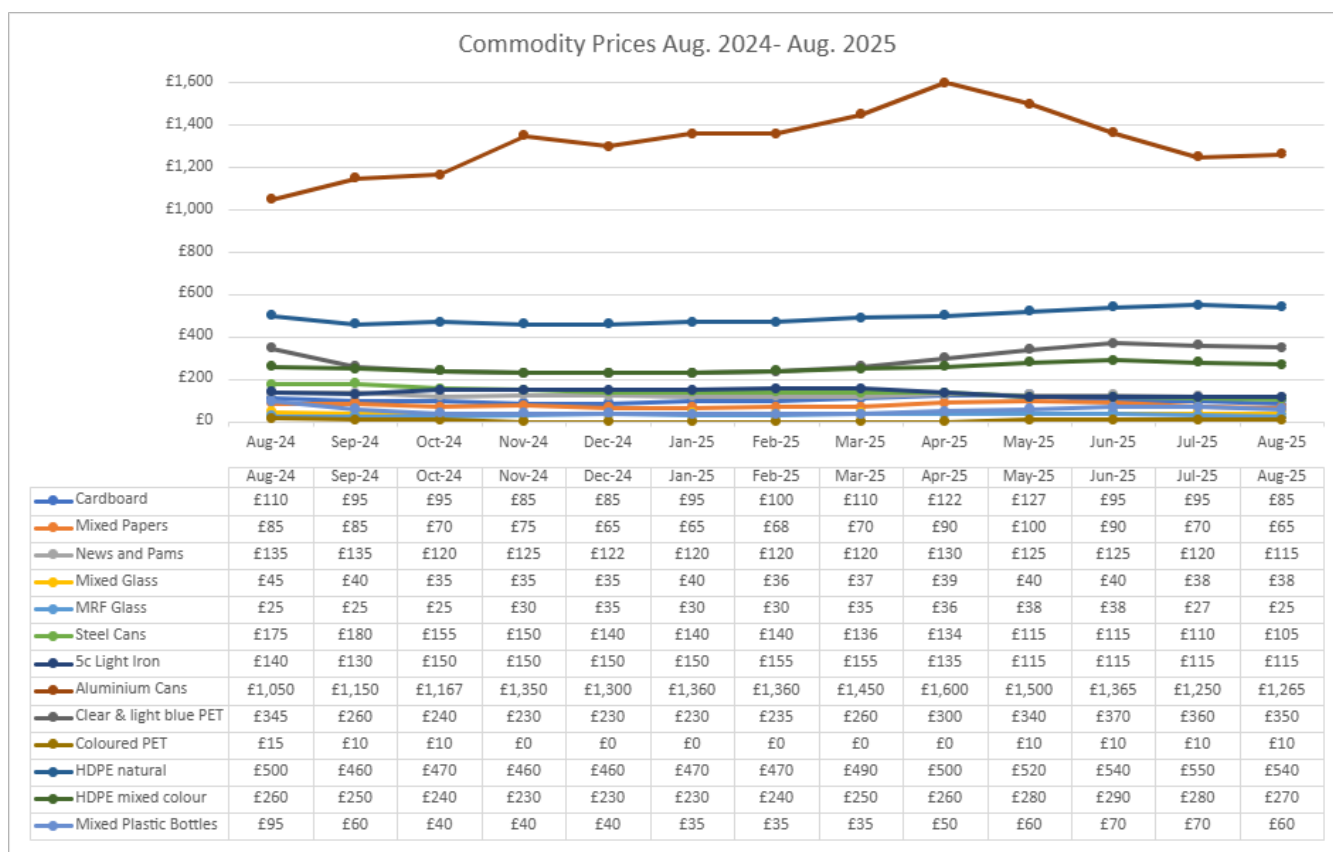


Figure 3: Commodity Prices August 2024 – August 2025

- 5.1. Figure 3 details the movement in commodity prices over the last 12 months (August 2024 - August 2025).
- 5.2. **Fibre materials**, which represent 46% of NLWA's DMR loads, experienced a general decline in value. Cardboard began at £110 per tonne and ended the period at £85, despite peaking at £127 in May. Mixed Papers followed a similar trajectory, falling from £85 to £65 per tonne, with a brief recovery in spring. These movements reflect fluctuating demand from export markets and ongoing uncertainty in shipping availability, particularly in the Far East
- 5.3. **Glass**, makes up for 21% of our DMR loads by weight and this has remained relatively stable with MRF Glass prices remaining flat overall, starting and ending at £25 per tonne. This stability is indicative of consistent domestic demand and limited exposure to international market volatility.
- 5.4. **Metals**, which make up only 3% of our DMR loads, showed mixed performance. Whilst the price for Steel Cans declined, Aluminium Can prices rose significantly from £1,050 to £1,265 per tonne, peaking at £1,600 in April. This surge reflects strong global demand for non-ferrous metals.

DMR Net Basket Price				
	Budget	Actual	Budget	Actual
	24/25	24/25	25/26	25/26
Q1	£39.00	£36.17	£37.37	£40.26
Q2	£39.00	£56.04	£58.06	£48.79
Q3	£39.00	£49.38	£51.16	-
Q4	£39.00	£35.78	£37.10	-

*Table 6: Dry Mixed Recycling Net basket Price*

- 5.5. Table 5 above shows the value of DMR materials against Budget. The DMR net basket price is calculated using published prices for the previous three months. For example, the Q1 figure is the average of commodity prices published on the market index, Letsrecycle, for January to March 2025.
- 5.6. The current annual average value for 2025/26 is £45.52, a 0.9% decrease compared to the budgeted annual average of £45.92.
- 5.7. During the first and second quarters of the year, the Authority benefitted from a modest uplift in commodity net basket value, fuelled by aluminium and fibre. However, the Q2 Net Basket Price remained lower than budget following a drop in aluminium prices in May 2025. Global geopolitical tensions, inflationary pressures, and legislative changes such as Extended Producer Responsibility and Deposit Return Schemes, make it difficult to predict whether this decline will be sustained. However, given the current instability in the commodity market, there is a high risk that the actual Net Basket Price value will fall below the budgeted value for Q3 and Q4. Officers are closely monitoring commodity market conditions and using industry intelligence to review recycling revenue forecasts.

## **6. SPECIALIST RECYCLING UPDATE**

- 6.1. This section provides an update on the specialist recycling services offered across NLWA's seven RRCs. These provide residents with solutions for materials that are difficult to recycle and impractical to collect as part of a kerbside collection service provided by boroughs.

### **Expanded Polystyrene**

- 6.2. From April to August 2025, 7.1 tonnes of Expanded Polystyrene (EPS) have been captured for recycling. This is just over 2 tonnes more than the amount of EPS material collected for recycling in the same period last year.

### **Mattresses**

- 6.3. Between April and August 2025/26, 40,545 mattresses were collected for recycling across RRCs and transfer stations, with August recording the highest monthly total

of 8,856. So far this year, the average number of mattresses captured per month is slightly lower than the average for 2024/25.

### **Carpets**

- 6.4. Between April and August 2025, 131 tonnes of carpet have been captured for recycling across the RRCs, averaging 26 tonnes per month. This marks a rise from the 2024/25 monthly average of 19 tonnes, likely driven by greater awareness of the service and service expansion to EcoPark RRC in Q2 2024/25.

### **DIY Reuse**

- 6.5. For the period April to August 2025, 12.5 tonnes of DIY materials were taken by north London residents for reuse from South Access Road and Summers Lane RRCs.
- 6.6. The items most commonly taken by members of the public since April 2025 include bricks, roof tiles and other domestic tiles, paving slabs, stone chippings and bags of cement.

### **Vapes (E-cigarettes)**

- 6.7. 670 kilograms of disposable vapes (e-cigarettes) have been separately captured for recycling across RRCs since the beginning of April 2025. This is equivalent to approximately 31,905 individual disposable vapes diverted from litter, street and kerbside bins and brings the total collected since the scheme started to approximately 71,500 vapes.

### **Toys**

- 6.8. 1.4 tonnes of toys have been diverted from the residual waste and captured for reuse at Summers Lane RRC since June 2025. This is equivalent to 3,200 teddy bears reused and saved from end of life.

### **Bikes**

- 6.9. Across all seven RRCs, 147 bikes have been diverted for reuse and donated to The Bike Project since the scheme commenced in Spring 2025. This partnership reflects NLWA's ongoing commitment to waste prevention and the preservation of resources. By offering donate unwanted bikes, the scheme directly addresses the need to cut household waste and prioritise reuse, repair and recycling as well as supporting free, sustainable travel.
- 6.10. NLWA receive a high volume of bikes across all RRCs and a proportion of these will continue to be reused and sold through the ReUse Shop at Kings Road RRC. Between April and August 2025, 1,644 bikes were diverted from disposal at the ReUse Shop.

## **7. RRC COMMODITY END MARKETS UPDATE**

- 7.1. End markets for various recyclable materials continue to face pressure due to processing capacity. The following section details the market position on hard plastics and wood.

### **Hard plastics**

- 7.2. Since March 2023, NLWA has operated a trial to recycle hard plastics, initially at Regis Road RRC and then across three additional sites: South Access Road RRC, Hornsey Street RRC and the Edmonton EcoPark RRC. Due to the volatility of end markets for hard plastics, recycling arrangements were secured through a purchase order system with Cory. 280 tonnes of material have been captured for recycling since the trial commenced.
- 7.3. In Summer 2024, Cory stopped accepting hard plastics due to difficulties securing a recycling offtaker. After engagement with the market, LEL entered an arrangement with Pearce Recycling Ltd—already servicing NLWA RRCs for other commodities—under stricter quality and material acceptance criteria. However, in May 2025, Pearce Recycling withdrew from the arrangement citing ongoing supply chain issues.
- 7.4. High energy costs and cheaper imported plastics are limiting end markets for recycled hard plastics. Despite efforts by LEL and NLWA to find alternative recyclers, including engagement with other London Joint Waste Disposal Authorities and commercial operators, no viable options have emerged. Many local authorities have stopped accepting hard plastics at RRCs or have limited the range of hard plastics accepted. As a result, LEL has suspended hard plastic collections at RRCs until an alternative supplier is secured and have repurposed containers for carpet recycling.

### **Wood recycling**

- 7.5. NLWA captures approximately 10,000 tonnes of wood across the RRC and waste transfer station network each year. In Autumn 2024, NLWA worked with LEL to secure recycling capacity for this material through a contract with Envar. Envar subcontract Countrystyle Recycling Ltd based at Ridham Docks to sort the material and send it to Kronospan who operate a wood recycling facility in Latvia. Through this arrangement, NLWA were achieving an 89% recycling rate on waste wood where previously this material was being treated through energy recovery.
- 7.6. Since early 2025, there have been several planned and unplanned closures at UK wood biomass plants, the primary disposal route for wood in the absence of recycling markets. Planned closures often occur in Summer as demand for wood biomass is greater in Winter when energy use is higher. However, an unexpected

turbine failure at one of the largest UK plants earlier in the year has placed significant pressure on biomass capacity and reduced outlets for waste wood.

7.7. The UK waste wood market became oversaturated which resulted in an excess of material being channelled into Countrystyle Recycling Ltd and Kronospan. As their recycling facility reached capacity, sending material to Kronospan became cost-prohibitive and in mid-July 2025, Countrystyle Recycling began stockpiling material at its Ridham site. LEL's contract with Envar allowed contingency diversion to biomass. When the market conditions didn't improve, some stockpiled wood was sent to biomass. Despite struggling market conditions, Countrystyle Recycling commenced a phased reintroduction to Kronospan in mid-August, earlier than predicted. NLWA's wood recycling rate reduced to 44% in August and with the expected recovery it is not anticipated to significantly affect 2025/26 RRC recycling rates. NLWA remains in a stronger position than many authorities diverting material to energy from waste. LEL expects full operations to resume by October 2025.

7.8. Figure 4 below shows a significant drop in wood prices from June 2025. Where prices were stable and even attracting an income of £10 per tonne for high grade material, the cost for disposing of wood has now increased by £20 per tonne. This cost increase has not impacted NLWA as officers have worked with LEL to secure positive arrangements with contractors for an outlet for RRC material.

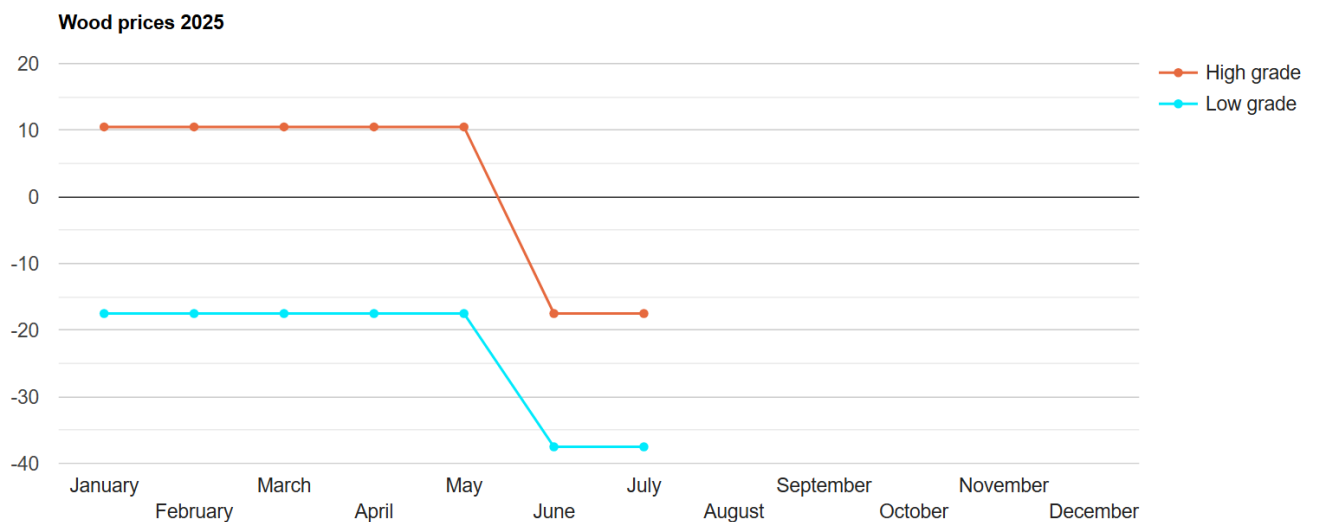


Figure 4: Wood prices from January to July 2025

**8. EQUALITIES IMPLICATIONS**

8.1. There are no equalities issue arising from of this report.

**9. COMMENTS OF THE LEGAL ADVISER**

9.1. The Legal Adviser has been consulted in the preparation of this report, and comments have been incorporated.

**10. COMMENTS OF THE FINANCIAL ADVISER**

10.1. The Financial Adviser has been consulted in the preparation of this report, and comments have been incorporated.

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