NORTH LONDON WASTE AUTHORITY

REPORT TITLE: SERVICES AND POLICY UPDATE

REPORT OF: HEAD OF STRATEGY AND SERVICES

FOR SUBMISSION TO: AUTHORITY MEETING

DATE: 12 NOVEMBER 2026

SUMMARY OF REPORT:

This report provides Members with details of operational performance in the first months of the 2026/27 reporting year. It sets out confirmed tonnage and performance data and updates on specialist recycling initiatives.

RECOMMENDATIONS:

The Authority is recommended to note the service update provided.

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

Date: 02 November 2026

1. BACKGROUND

1.1. This report provides Members with an update on the operational performance.

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 and deliver to the Authority just over 750,000 tonnes of waste and recycling a year, of which circa 675,000 tonnes are 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

3.1. The following section provides a picture of actual waste tonnages delivered by constituent boroughs for residual, dry mixed recycling (DMR) and organic waste for the first six months of 2026/27. Table 1 below shows actual performance for residual waste in 2026/27 compared with the same months in 2025/26. Table 2 shows how the performance for 2026/27 compares with the assumptions agreed with boroughs when the Authority budget was set for this year.

3.2. Forecasts of tonnages to be included in the NLWA budget for each waste stream are developed by boroughs in Quarter (Q)4 of each financial year and reviewed and agreed with NLWA officers.

Residual waste excluding Reuse and Recycling Centres (RRCs)

RESIDUAL VS PRIOR YEAR	April-Sept tonnages		
	2025/26	2026/27	Difference
Barnet	53,351	51,138	-4.1%
Camden	35,058	33,300	-5.0%
Enfield	43,137	42,774	-0.8%
Hackney	43,605	41,836	-4.1%
Haringey	34,899	34,270	-1.8%
Islington	33,915	35,196	3.8%
Waltham Forest	28,810	29,668	3.0%
NLWA total	**272,774**	**268,182**	**-1.7%**

Table 1: Collected residual waste excl. RRC tonnage for April-September 2026 compared to the same period in 2025

3.3. Table 1 above shows that 2026/27 residual waste tonnages are currently lower than they were last year with some variation between boroughs.

3.4. At the end of March 2026, Barnet introduced a separate food waste collection. The diversion of some food waste from the residual waste stream will have been a material contributor in the 4.1% reduction in residual tonnage they have experienced.

3.5. Waltham Forest introduced fortnightly residual waste collections and a separate weekly food waste service in Autumn 2024. This resulted in a 6,500 tonne or 10.1% reduction in residual waste in 2025/26 compared to 2024/25. Data for the first six months of 2026/27 show a 3.0% increase (857 tonnes) in residual waste compared with the large reductions which were seen immediately after the service change. This is not unusual to see following a significant service change as residents become used to the service.

3.6. During 2024/25, Hackney's trading company collected residual waste from commercial customers outside north London. This was delivered in Hackney vehicles to NLWA and so was recorded as Hackney tonnage for the purposes of NLWA recording. This increased the borough's tonnage delivered for treatment by nearly 20,000 tonnes. As the company ceased operating in February 2026, the stopping of this out of area waste is likely a key factor behind Hackney's 4.1% reduction compared to prior year recorded in the first six months of 2026/27.

3.7. Other boroughs, including Camden and Islington, have seen notable changes in residual tonnage during the first six months of the year that are not reflected in the 2026/27 budget (see table 2 below), where the cause is less clear. Officers will continue to monitor tonnages to determine whether these changes represent an ongoing trend or are being influenced by temporary factors, such as differences in the number of collection days compared with the previous year.

RESIDUAL VS BUDGET	April-Sept tonnages		
	Budget 2026/27	Actual 2026/27	Difference
Barnet	49,527	51,138	3.3%
Camden	34,818	33,300	-4.4%
Enfield	42,237	42,774	1.3%
Hackney	43,518	41,836	-3.9%
Haringey	34,946	34,270	-1.9%
Islington	33,660	35,196	4.6%
Waltham Forest	29,713	29,668	-0.2%
NLWA total	**268,419**	**268,182**	**-0.1%**

Table 2: Collected Residual Waste excl. RRC tonnage for April-September 2026 compared to budget

3.8. Table 2 shows that, at a regional level, overall residual tonnages are broadly in line with budget for the first six months of 2026/27, although performance varies by borough.

Barnet expected a larger reduction from its food waste service, which has not fully materialised.

3.9. Most boroughs expected tonnages to remain in line with 2025/26 or increase slightly due to population growth. Instead, overall tonnages have fallen, potentially reflecting increased food waste collections, although growth in food waste is small relative to the reduction in residual waste (see Table 5). April to September 2026/27 data is consistent with the broader trend of stable tonnages over the past five years (see Figure 1).

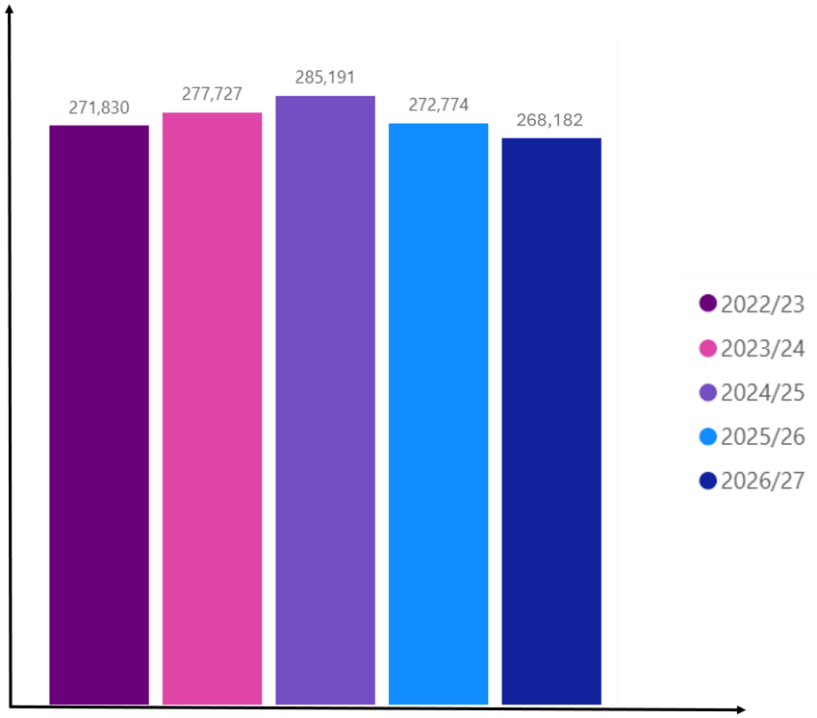


Figure 1: Residual waste tonnages for the period April-September over the past five years

Dry Mixed Recycling (DMR)

3.10. Table 3 below shows actual performance for DMR in 2026/27 compared with the same months in 2025/26. Table 4 shows how the performance for 2026/27 compares with the assumptions agreed with boroughs for DMR when the Authority budget was set for this year.

DMR VS PRIOR YEAR	April-Sept tonnages		
	2025/26	2026/27	Difference
Barnet	11,995	12,379	3.2%
Camden	8,076	7,904	-2.1%
Enfield	9,214	9,406	2.1%
Hackney	8,487	8,539	0.6%
Haringey	8,214	8,123	-1.1%
Islington	7,174	6,921	-3.5%
Waltham Forest	9,583	9,860	2.9%
NLWA total	**62,743**	**63,132**	**0.6%**

Table 3: Collected dry mixed recycling for April-September 2026 compared to the same period in 2025

3.11. Table 3 shows that overall DMR tonnages for the first six months are the year are similar to last year. Barnet's new food waste service communications promoted wider recycling behaviours, which has likely contributed to a 3.2% increase in DMR tonnage compared with 2025/26.

3.12. Similar to the differences seen in residual waste, Camden and Islington have seen greater than expected reductions in DMR compared to 2025/26. Officers will liaise with opposite numbers in boroughs to investigate this further and provide an update in future report to Members.

DMR VS BUDGET	April-Sept tonnages		
	Budget 2026/27	Actual 2026/27	Difference
Barnet	12,560	12,379	-1.4%
Camden	7,949	7,904	-0.6%
Enfield	9,306	9,406	1.1%
Hackney	8,482	8,539	0.7%
Haringey	8,216	8,123	-1.1%
Islington	7,149	6,921	-3.2%
Waltham Forest	9,611	9,860	2.6%
NLWA total	**63,273**	**63,132**	**-0.2%**

Table 4: Collected dry mixed recycling for April-September 2026 compared to budget

3.13. Overall DMR tonnages are performing as expected when the budget was set. Excluding those that have experienced service changes, boroughs have typically seen DMR tonnages remain constant over the past few years.

Whilst the overall picture for April to August is close to forecast, there is some variation between boroughs. When Waltham Forest introduced fortnightly residual waste collections in 2025/26, they saw an increase in recycling tonnage (7.7% increase compared

to 2024/25). Looking at the first six months of 2026/27, the borough continues to benefit from the introduction of fortnightly residual waste collections and has seen a greater increase in DMR tonnage than anticipated (2.6% above budget). Enfield anticipated a small increase on 2025/26 tonnages when setting their budget for 2026/27 due to planned recycling initiatives. Table 4 suggests they are currently performing above this expected increase.

Organic waste streams

3.14. Table 5 below shows actual performance for garden waste and food waste in 2026/27 compared with the same months in 2025/26. Table 6 shows how the performance for 2026/27 compares with the assumptions agreed with boroughs for garden waste and food waste when the Authority budget was set for this year.

GARDEN VS PRIOR YEAR	April-Sept tonnages		
	2025/26	2026/27	Difference
Barnet	5,658	5,147	-9.0%
Camden	851	817	-3.9%
Enfield	3,654	3,221	-11.9%
Hackney	673	730	8.6%
Haringey	1,501	1,364	-9.2%
Islington	587	590	0.4%
Waltham Forest	3,756	3,535	-5.9%
NLWA total	**16,679**	**15,404**	**-7.6%**

FOOD VS PRIOR YEAR	April-Sept tonnages		
	2025/26	2026/27	Difference
Barnet	0	2,647	-
Camden	1,465	1,547	5.6%
Enfield	3,346	3,501	4.6%
Hackney	2,223	2,266	1.9%
Haringey	1,909	1,877	-1.7%
Islington	1,362	1,406	3.3%
Waltham Forest	3,344	3,257	-2.6%
NLWA total	**13,649**	**16,501**	**20.9%**

Table 5: Collected Organics (Food Waste and Garden Waste) for April-September 2026 compared to the same period in 2025

3.15. Table 5 shows actual food waste and garden waste tonnages for April to September 2026/27 compared to 2025/26 tonnages for the same period. Tonnages for garden waste are heavily dependent on the weather. Hot and dry weather conditions early in the financial year have resulted in fewer garden waste arisings than in 2025/26.

3.16. Barnet introduced new separate weekly food waste collections at the end of March 2026. Between April and September 2026/27, Barnet have captured 2,647 tonnes of food waste. If Barnet's new tonnage is excluded food waste has improved by 1.5% across the remaining NLWA constituent boroughs, rather than 20.9% shown in table 5.

3.17. Increasing food waste tonnage is recognised as a behavioural challenge. Shifting attitudes towards perceived barriers to participation is proving difficult and will require concerted communications and behaviour change work at national, regional and local level. Barriers to the service include lack of space in kitchens, misuse of communal bins by a minority that hampers the majority, and a number of hard to tackle misconceptions relating to odour, cleanliness, pest and health concerns. In this context a 1.5 % increase in overall tonnage,

excluding Barnet, is not insignificant. This increase could partly be driven by boroughs expanding collections to estates and flats above shops (FLASH) under Simpler Recycling requirements that became mandatory on 31st March 2026.

GARDEN VS BUDGET	April-Sept tonnages		
	Budget 2026/27	Actual 2026/27	Difference
Barnet	6,883	5,147	-25.2%
Camden	909	817	-10.1%
Enfield	4,350	3,221	-26.0%
Hackney	686	730	6.5%
Haringey	1,598	1,364	-14.7%
Islington	650	590	-9.3%
Waltham Forest	4,060	3,535	-12.9%
NLWA total	**19,136**	**15,404**	**-19.5%**

FOOD VS BUDGET	April-Sept tonnages		
	Budget 2026/27	Actual 2026/27	Difference
Barnet	4,373	2,647	-39.5%
Camden	1,479	1,547	4.6%
Enfield	3,379	3,501	3.6%
Hackney	2,255	2,266	0.5%
Haringey	1,928	1,877	-2.7%
Islington	1,475	1,406	-4.7%
Waltham Forest	3,378	3,257	-3.6%
NLWA total	**18,267**	**16,501**	**-9.7%**

Table 6: Collected Organics (Food Waste and Garden Waste) for April-August 2026 compared to budget

3.18. Table 6 shows garden waste and food waste tonnages compared to budget for April to September 2026/27.

3.19. Following a dry period in 2025/26, most boroughs were anticipating a return to average garden waste levels in 2026/27. However, continued poor growing conditions caused by numerous heat waves in 2026 means garden waste tonnages have remained low.

3.20. Food waste is 1,766 tonnes below budget for April to September 2026/27. Most boroughs were anticipating a small increase in food waste in 2026/27 driven by the expansion of dedicated collections to flats and businesses. For some boroughs, this increase has begun to materialise, and Camden, Enfield and Hackney are performing better than expected. Others, including Islington and Barnet have seen an increase compared to prior year for the first six months of the year but a smaller increase than anticipated. Waltham Forest were expecting to see a small increase in tonnage in the second year of operating separate food waste collections which is not yet reflected in the first six months of 2026/27.

Waste performance metrics

3.21. Figure 2 below shows the household recycling rate for each north London borough for the period 2021/22 to 2025/26. Local Authorities in England have a statutory requirement to submit tonnage data to WasteDataFlow, a national tonnage reporting system, on a quarterly basis. Defra uses WasteDataFlow figures to produce an annual national statistical release. 2025/26 tonnages and performance measures are provisional as, at the time of writing, WasteDataFlow tonnages for 2025/26 are not fully reconciled nationally, and Defra has not yet published the final numbers for 2025/26. There is likely to be some movement in the 2025/26 figures shown in figure 2 when the statistical release is published in Spring 2027. Because of this, a national average is not available for 2025/26.

3.22. In 2025/26, Waltham Forest introduced a separate food waste collection service and restricted residual waste capacity which resulted in an increase in organic waste, reduction in household residual waste and an increase in dry mixed recycling (7.7% increase on prior year). Although the 2025/26 numbers in figure 2 are provisional, officers would expect to see an increase in Waltham Forest's recycling rate for that year. The impact of Barnet's separate food waste collections on recycling rate will be reflected in 2026/27 numbers as the service was introduced at the end of March 2026.

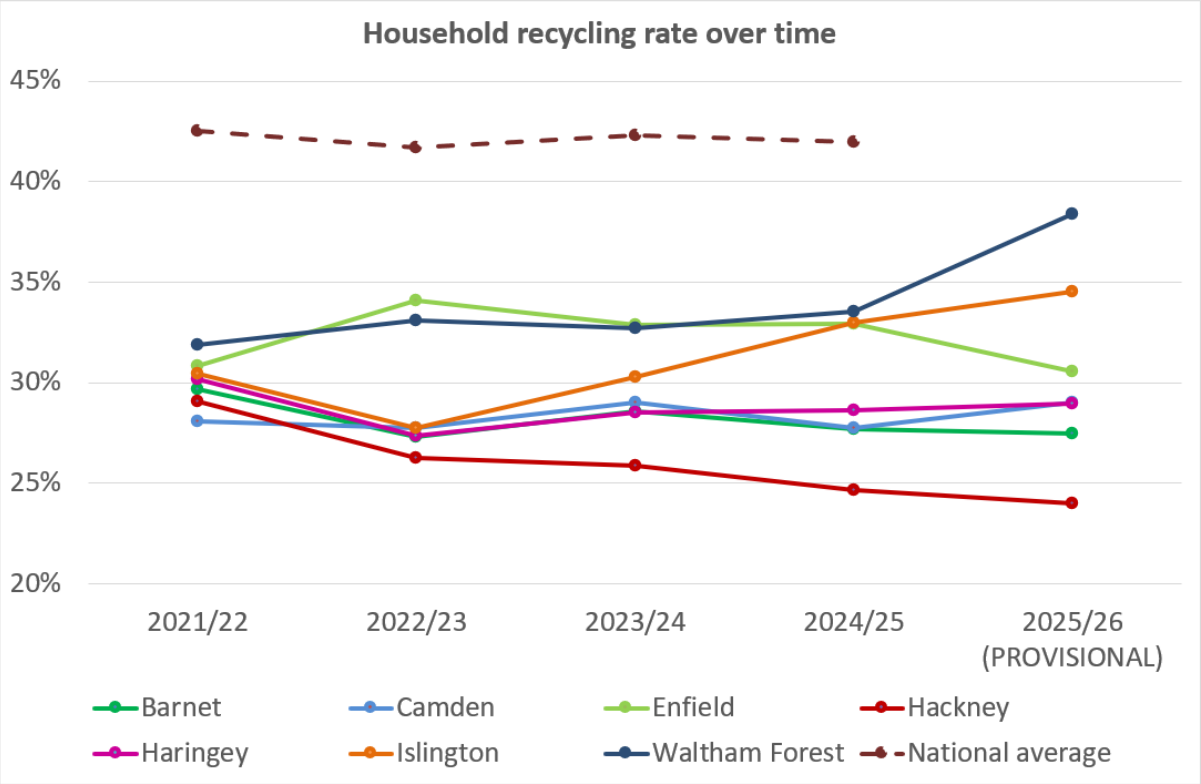


Figure 2: Household recycling rate over time by borough and compared to the national average for England. Source: nationally reported statistics using WasteDataFlow

3.23. Traditionally, local authorities have measured waste performance using household recycling rates which capture the amount of dry mixed recycling, compostable waste and separately collected recyclable fractions as a proportion of total household waste collected in an area. Due to the nature of north London's housing stock, particularly the high proportion of flats and the low number of gardens, opportunities to transform the recycling rate are limited. A lack of storage space in areas with high-density or crowded housing limits opportunities for residents to segregate recyclable materials and a more mobile population creates challenges for communication and engagement with services.

3.24. Compared to the national average, north London collects and recycles less organic waste. North London has fewer properties with gardens than in the rest of England while gardens across London are also 26% smaller than the national average. In more rural authorities, garden waste can contribute significantly to recycling rates. This is a limiting factor on

north London's overall recycling rate, as the quantity of garden waste present in other areas is simply not available in north London.

3.25. While recycling rates can be a useful metric, as a statutory target recycling percentage does not record or incentivise a reduction in overall waste produced. This is why the Government has set a national long-term target under the Environment Act 2021 to reduce residual waste (excluding major mineral wastes) per capita in England by 50% by December 31, 2042 (compared to 2019 levels). In the North London Joint Waste Strategy (NLJWS), NLWA calls on government to improve the metrics and reporting methods which are used to measure performance and track waste management nationally. This includes moving away from proportional targets such as recycling rate to focus on waste reduction, as this better reflects the quantity of waste arising and its impact across the country. Using these metrics, government could more effectively measure and incentivise a reduction of overall waste, which would bring about the most significant environmental benefits.

3.26. The NLJWS commits NLWA and the Boroughs to reporting alternative performance metrics that focus on waste reduction. Figure 3 below shows north London borough performance for household waste per person. This has historically received less attention than recycling rates.

Between 2021/22 and 2024/25, the total household waste per person has reduced for all north London boroughs and remains below the national average for England. This reflects flats producing less waste per household and a smaller amount of garden waste than in other boroughs. The downward trend in household waste per person in north London is likely due to stagnating tonnages because of cost-of-living pressures and population increases in each borough.

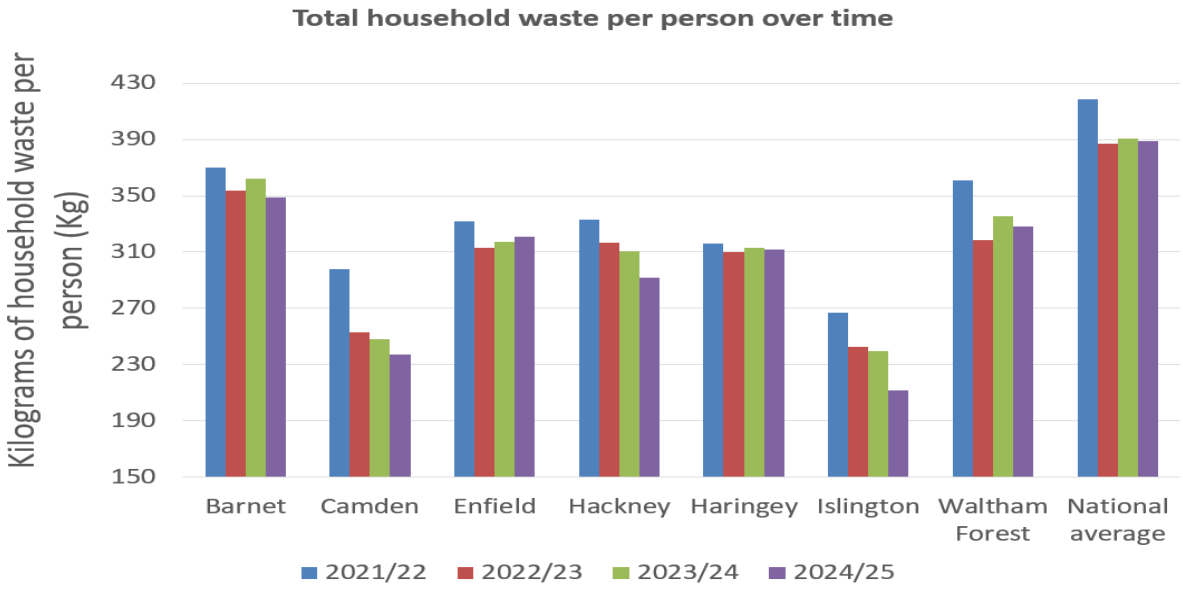


Figure 3: Total household waste per person (kilograms) over time by borough and compared to the national average for England. Source: nationally reported statistics using WasteDataFlow

4. COMMODITY END MARKETS AND RESILIENCE

4.1. Recent events have highlighted growing pressures on waste sector resilience. Extended periods of hot weather, disruptions in domestic waste processing infrastructure, a significant increase in battery related fires and more stringent environmental regulations have exposed vulnerabilities across multiple waste streams.

4.2. The loss of Wembley Waste Transfer Station has removed valuable storage capacity that allowed the Authority to stockpile recyclable materials when the market was in crisis. This capacity enabled the authority to continue to accept materials at its RRC store them temporarily at Wembley until such time as the market had recovered.

Waste fridge recycling

4.3. Higher temperatures have increased demand for fridge disposal due to appliance failures. There is also limited domestic processing capacity which has led to stockpiling by some local authorities. Waste Electrical and Electronic Equipment (WEEE) is managed under a producer responsibility scheme which requires producers of electricals to pay for the disposal of WEEE through a Producer Compliance Scheme (PCS). However, with a shortage of recycling plants and unclear legislation, some PCSs have refused to collect the growing numbers of waste fridges and freezers from local authorities. This has placed pressure on local authorities to put in place contingency arrangements to store bulky WEEE within their own disposal infrastructure networks using already constrained sites for short-term storage.

4.4. NLWA have worked with a PCS managed by European Recycling Platform (ERP) and are working to minimise any impact on residents by managing occasional service interruptions where they arise. As a result, NLWA has avoided the significant off-taker challenges and recycling service issues experienced by some neighbouring authorities. Officers are actively monitoring developments within this service area and reviewing contingency arrangements to ensure the ongoing resilience of fridges and freezers recycling collections and treatment services should market conditions or off-taker availability worsen.

Textiles reuse and recycling

4.5. Over the past few years, the value of textiles has fallen sharply due to oversupply of poor-quality textiles and global political issues increasing energy and shipping costs. This led to The Salvation Army Trading Company, the textile recycling arm of The Salvation Army, withdrawing from all local authority RRC textile bank contracts in December 2025, including in north London. London Energy Limited (LEL) quickly secured an arrangement with an alternative local textile recycling company, East London Textiles. Despite having a limited time for exchange of contracts and mobilisation, the RRC service was maintained with no disruption to residents.

4.6. In early Summer 2026, the Environment Agency (EA) introduced more stringent regulations on sorting and grading textiles for reuse and recycling prior to export. In August 2026, East

London Textiles notified LEL that they had limited capacity at their sites as the EA regulations required them to spend more time sorting material by quality and type before onward transport. Therefore, LEL were only accepting textiles at Hornsey Street and EcoPark Reuse and Recycling Centres (RRC's) in response to the lack of capacity at the reprocessor's end. A full service resumed on Monday 14th September, but as markets come under pressure due the volatility in the market, officers are working with LEL to build resilience into arrangements to ensure services are maintained for residents.

5. SPECIALIST RECYCLING UPDATE

5.1. This section provides an update on the specialist recycling services offered across NLWA's eight 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.

5.2. NLWA's scale and access to LEL-operated waste management infrastructure across north London play a critical role in maintaining specialist recycling services for volatile and difficult-to-recycle materials. Weak and often unstable end markets mean that reprocessors typically require significant volumes of material before recycling becomes commercially viable. NLWA's transfer station network provides the opportunity to offer these services by enabling LEL to bulk and store materials collected from RRCs until sufficient volumes are available for onward transport and treatment. This infrastructure also helps maintain service continuity when disruptions occur. For example, following a fire at a south London site operated by NLWA's mattress recycling contractor, SSSI, in early 2026, LEL used the Wembley transfer station to stockpile mattresses from RRCs, ensuring residents continued to have access to the service whilst treatment capacity was restricted.

5.3. However, the fire at Wembley in August 2026 has reduced this resilience. Prior to the fire, expanded polystyrene collected across the RRC network was bulked and stored at Wembley before being transported to a recycling contractor in Hampshire for treatment. As Wembley is no longer available for this operation, NLWA and LEL are exploring alternative management arrangements. It is likely that the contractor will need to collect material directly from individual RRCs in smaller loads, reducing operational efficiency, increasing transport costs and potentially undermining the long-term viability of the service.

5.4. Additionally, in October 2026, NLWA was informed that the off-taker for carpets at RRCs could no longer accept material for recycling. In normal circumstances, NLWA would stockpile material until alternative arrangements were made to avoid a disruption of service to residents. However, with the loss of the Wembley transfer station, this has not been possible and whilst LEL will continue to provide bins for carpets at RRCs, the material will not be recycled temporarily. LEL have engaged with an alternative supplier and have sent trial loads to their processing facility. NLWA and LEL hope to reinstate a recycling service for carpets with the new supplier but until this has been tested and agreed, carpets will be sent for residual recovery. The loss of service resilience with Wembley becoming unavailable has undermined the viability of specialist recycling services in the short-term.

	April to Sept 2025 (tonnes)	April to Sept 2026 (tonnes)
Expanded polystyrene	7.6	2.1
Carpets	186	226
DIY Reuse	47	49
Mattresses	154	197
Toys	2.2	1.9
Vapes	3.3	1.1
Number of bikes reused		
RRC Reuse Shops	1,923	1,773
The Bike Project	167	210

Table 9: RRC specialist recycling tonnages for April-August 2026 compared to prior year

5.5. Table 9 above shows the volume of specialist recycling material collected from RRCs between April and August 2026 compared to the same period in 2025.

5.6. Just over one tonne of disposable vapes (e-cigarettes) have been separately captured for recycling across RRCs since the beginning of April 2026. This is equivalent to approximately 43,000 individual disposable vapes diverted from litter, street and kerbside bins this year. 1.9 tonnes of toys have been diverted from residual waste and captured for reuse at Summers Lane RRC this fiscal year.

5.7. More carpets have been recycled between April and September 2026 compared to the same period last year. NLWA started recycling carpets in November 2023 and have since collected enough material to cover 51 Premier League sized football pitches.

Bikes

5.8. Across all RRCs, 527 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.

5.9. 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 Shops. Between April and August 2026, 1,670 bikes were sold from the ReUse Shop at Kings Road RRC in Waltham Forest. Since LEL took operational control of the site in July 2026, 103 bikes have been sold from the shop at Barrowell Green RRC in Enfield.

6. EQUALITIES IMPLICATIONS

6.1. There are no equality implications associated with this report.

7. COMMENTS OF THE LEGAL ADVISER

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

8. COMMENTS OF THE FINANCIAL ADVISER

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

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