

NORTH LONDON WASTE AUTHORITY

REPORT TITLE: SERVICES UPDATE

REPORT OF: HEAD OF STRATEGY AND SERVICES

FOR SUBMISSION TO: AUTHORITY MEETING

DATE: 24 APRIL 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 and the continued efforts to increase the range of materials which are recycled in north London.

RECOMMENDATIONS:

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

Signed:  Head of Strategy and Services

Date: 10 April 2025

1. BACKGROUND

- 1.1. This report provides Members with an update of service activity since the September Authority meeting and provides tonnage data and performance information for the period April – February 2024/25 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

- 3.1. Residual tonnages have performed as expected during 2024/25. If a volume of new commercial waste (described below) which was collected from outside of the north London area is excluded, the Year To Date (YTD) actual tonnages from April to February are less than 0.1% or 603t from the 2024/25 budget forecast. This is shown in Table 1.
- 3.2. During 2024/25 London Borough of Hackney collected circa 18,500t of commercial waste from contracts based in East London and Essex. LB Hackney have confirmed that these short-term commercial contracts will not be in place during the year 2025/26 as shown in Fig 1.

Residual waste excluding Reuse and Recycling Centres (RRCs)

	(A) 2023/24 outturn YTD (Apr-Feb)	(B) 2024/25 budget YTD (Apr-Feb)	(C) 2024/25 outturn YTD (Apr-Feb)	(C-B) Variance 2024/25 outturn v budget (t)	(C-B) Variance 2024/25 outturn v budget (%)	(C-A) Variance outturn 24/25 v 23/24 (t)	(C-A) Variance outturn 24/25 v 23/24 (%)
Barnet	96641	97920	96716	-1204	-1.2%	75	0.1%
Camden	63578	63426	64120	694	1.1%	542	0.9%
Enfield	84260	80267	80861	594	0.7%	-3399	-4.0%
Hackney	78366	78428	94724	16296	20.8%	16358	20.9%
Haringey	64199	62218	63676	1458	2.3%	-523	-0.8%
Islington	63012	62891	63090	199	0.3%	78	0.1%
Waltham Forest	61299	59109	60242	1133	1.9%	-1057	-1.7%
NLWA total	511355	504259	523429	19170	3.8%	12074	2.4%
Hackney (excl. NHH growth)	78366	78428	76157	-2271	-2.9%	-2209	-2.8%
Total (excl. Hackney NHH growth)	511355	504259	504862	603	0.1%	-6493	-1.3%

Table 1 Collected Residual Waste excl. RRC tonnage

3.3. Figure 1 demonstrates that actual residual tonnages for 2024/25 (April to February) are higher than tonnages in the preceding four years for the same period. However, when out of area tonnage is excluded 2024/25 tonnages are lower than in most recent years.

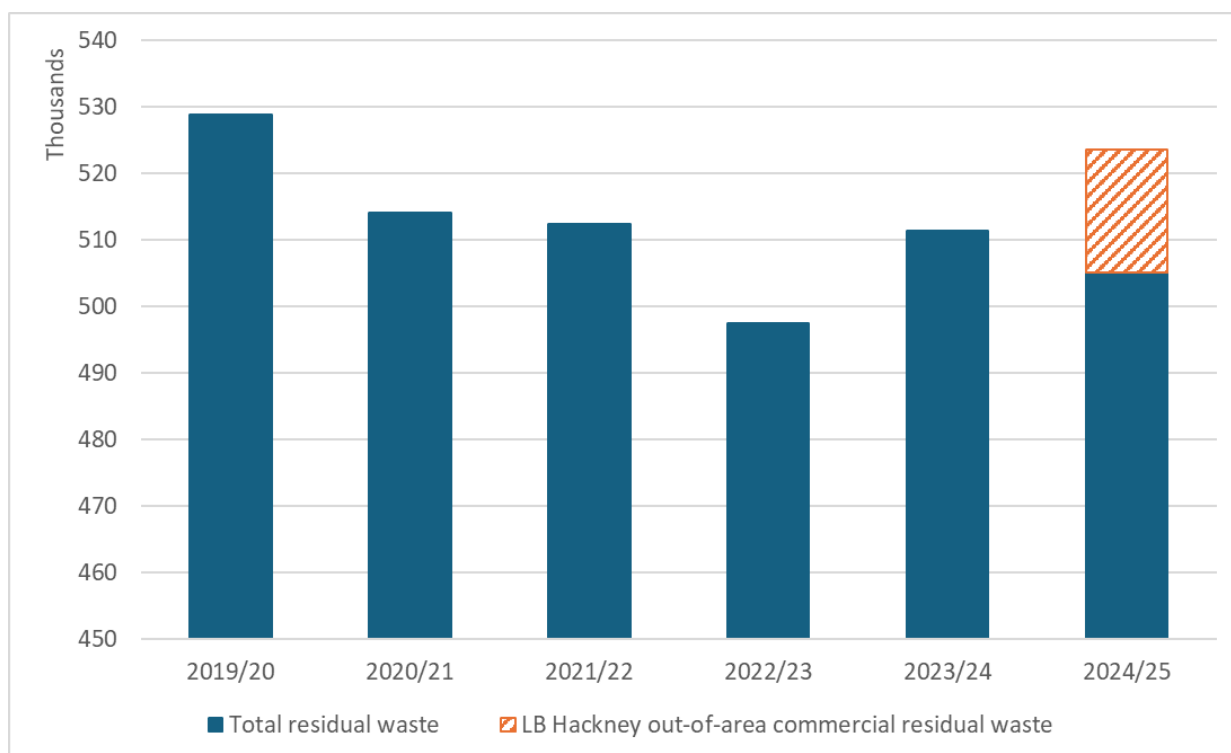


Figure 1: Residual waste tonnages for the period April to February and excluding LB Hackney commercial waste growth in 2024/25

Dry Mixed Recycling (DMR)

	(A) 2023/24 outturn YTD (Apr-Feb)	(B) 2024/25 budget YTD (Apr-Feb)	(C) 2024/25 outturn YTD (Apr-Feb)	(C-B) Variance 2024/25 outturn v budget (t)	(C-B) Variance 2024/25 outturn v budget (%)	(C-A) Variance outturn 24/25 v 23/24 (t)	(C-A) Variance outturn 24/25 v 23/24 (%)
Barnet	22810	23609	23037	-572	-2.4%	227	1.0%
Camden	15014	14163	14535	372	2.6%	-479	-3.2%
Enfield	16162	16149	16034	-115	-0.7%	-128	-0.8%
Hackney	15823	15950	15389	-561	-3.5%	-434	-2.7%
Haringey	15193	15444	15062	-382	-2.5%	-131	-0.9%
Islington	13370	13121	13301	180	1.4%	-69	-0.5%
Waltham Forest	16060	16439	15964	-475	-2.9%	-96	-0.6%
NLWA total	114432	114875	113322	-1553	-1.4%	-1110	-1.0%

Table 2: Collected Dry Mixed Recycling

- 3.4. DMR tonnages (table 2), have also performed as expected. There was a 1% reduction in tonnages YTD against 2023/24, which is similar to the reduction in residual waste shown in table 1 (excluding Hackney commercial growth).

Organic waste streams

	(A) 2023/24 outturn YTD (Apr-Feb)	(B) 2024/25 budget YTD (Apr-Feb)	(C) 2024/25 outturn YTD (Apr-Feb)	(C-B) Variance 2024/25 outturn v budget (t)	(C-B) Variance 2024/25 outturn v budget (%)	(C-A) Variance outturn 24/25 v 23/24 (t)	(C-A) Variance outturn 24/25 v 23/24 (%)
Food waste	17215	14520	20606	6086	41.9%	3391	19.7%
Garden waste	24725	26120	24044	-2076	-7.9%	-681	-2.8%
BioK	14783	11834	5698	-6136	-51.9%	-9085	-61.5%
Total kerbside	56723	52474	50348	-2126	-4.1%	-6375	-11.2%
RRC garden waste	4402	4402	5362	960	21.8%	960	21.8%
Total including RRC garden waste	61125	56876	55710	-1166	-2.1%	-5415	-8.9%

Table 3: Collected Organics – food waste, garden waste and mixed (BioK) - and RRC garden waste

- 3.5. Table 3 details actual organic waste performance in 2024/25 YTD (April to February), against previous years and the YTD budget forecast for 2024/25.
- 3.6. The reduction in tonnage is primarily due to less favourable growing conditions impacting green waste yields. Large variations in food waste and BioK (mixed green and food waste) are due to the removal of BioK collections in Islington and Waltham Forest in favour of separate food and garden waste collections.

RRC tonnages

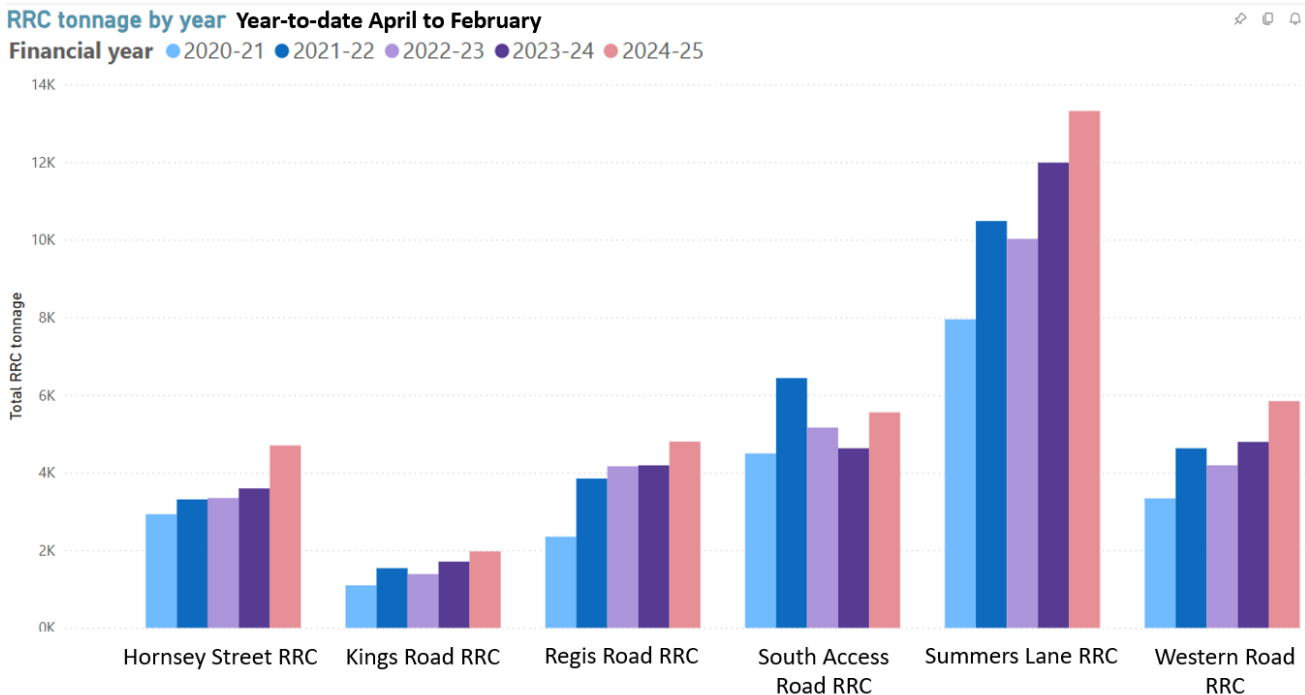


Figure 2: Tonnages of waste collected across six of the RRCs overtime for the period April to February

- 3.7. Figure 2 above shows that RRC tonnages year-to-date (April to February) 2024/25 remain higher than in 2023/24.
- 3.8. Residual waste tonnages, including bulky waste and Persistent Organic Pollutants (POPs) material, is 15% higher YTD in 2024/25 than in 2023/24 across all sites. Increased tonnages are expected to be largely driven by higher visitor numbers compared to last year.
- 3.9. RRC garden waste tonnages have also increased in the period April to February 2024/25 compared to the same period last year. It is expected that this trend will slow as boroughs enter a new subscription year for garden waste collections services and increase the number of residents signed up to the service.
- 3.10. Gateway Road RRC was closed in November 2024. Officers have been monitoring tonnages at South Access Road and Kings Road RRC to identify any increase in volumes associated with the closure of Gateway Road. For the period April to February there has been a 10% increase in tonnage when compared to 2023/24.
- 3.11. Visitor numbers to South Access Road have increased by 76% since November 2024 when Gateway Road RRC closed. This increase was expected, and South Access Road has sufficient capacity to manage increased tonnages and visitor numbers.

4. RECYCLING UPDATE

- 4.1. The Biffa Contract has now been extended until December 2029. The estimated value of the contract over its original 10-year term is £89M.
- 4.2. The contract extension delivers significant social benefits for the residents of north London, these include the employment of fifteen engineering apprentices with two additional apprentices and a graduate hire specifically linked to the NLWA contract.



Figure 3: Biffa apprentices scheme linked to NLWA contract

- 4.3. The material which is in household DMR collections unfortunately contains a volume of non-recyclable material. Monitoring of the DMR contract shows that it is currently processing and recovering 78% of all delivered material for recycling with the non-recyclable element - which is approximately 22% - being processed as Refuse Derived Fuel.
- 4.4. The contract allows loads with 15% - 25% contamination level to be accepted as 'downgraded loads'. This provision resulted in the acceptance of an additional 1,628 tonnes that would otherwise be rejected and saved circa £28,000 in rejected loads cost. Typically, in recycling contracts, the threshold for rejections is only 15%.
- 4.5. Biffa have also announced a significant investment and upgrade to the Edmonton facility at a cost of £4-5m to integrate newer sorting technologies to maintain maximum efficiency and ensure value for money for the Authority.
- 4.6. These included: replacement of the main in-feed conveyor; upgrading equipment to better separate card and mixed paper and introducing a new screen that will improve card capture; introducing robots into the quality control (picking) stations. Nine robots are proposed but is subject to test outcomes; upgrading optical

equipment to improve fibre and colour plastic extraction; undertaking a paper clean-up project with options for better differentiating different grades of fibre; and upgrading the multi optical system – as an alternative to the plant’s back-end material extraction prior to RDF production. These improvements together are aimed at enhancing the target material capture.

Destinations update

Material	Baseline March 2020			Q1-Q3 24/25		
	UK	Europe	Far East	UK	Europe	Far East
Cardboard			100%	15%	44%	41%
Mixed Paper	43%	19%	38%	6%	94%	0%
Glass	68%	32%		100%	0%	0%
Aluminium Cans	100%			100%	0%	0%
Steel Cans	100%			100%	0%	0%
Plastic Bottles	100%			100%	0%	0%
Other Plastics	100%			100%	0%	0%

Table 4

- 4.7. 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 and that be contractualised. However ahead of signing the extension, Biffa indicated that there had been adverse developments in the UK paper recycling market. While they would aim to recycle as much of NLWA’s paper in the UK, they could not agree to a contractual commitment.
- 4.8. The table above compares data for Quarter 3 (Q3) 2024/25 to the March 2020 baseline. The Authority continues to see and benefit from the strong domestic demand for metals, plastics and glass to ensure 100% treatment of those materials in the UK.
- 4.9. As previously reported to the Authority, the UK's current domestic capacity for reprocessing cardboard and mixed paper (fibres) falls short of the volume being produced. As a result, both the UK and European countries have been consistently exporting cardboard to far eastern markets for reprocessing. Despite energy and labour costs remaining relatively high in the UK and Europe, which has previously impeded processors to expand their capacity, the USA tariffs and related shipping constraints in Q3 2024/25 has resulted in more volumes going into Europe.

4.10. The level of detail reported for end destinations and the quality of this data varies across the sector which makes benchmarking challenging. Officers previously reported on the work with Biffa to improve the granularity and accuracy of the end destinations data for NLWA’s DMR, this work has now been completed and incorporated into the data dashboard for easier reporting going forward.

5. COMMODITY PRICES

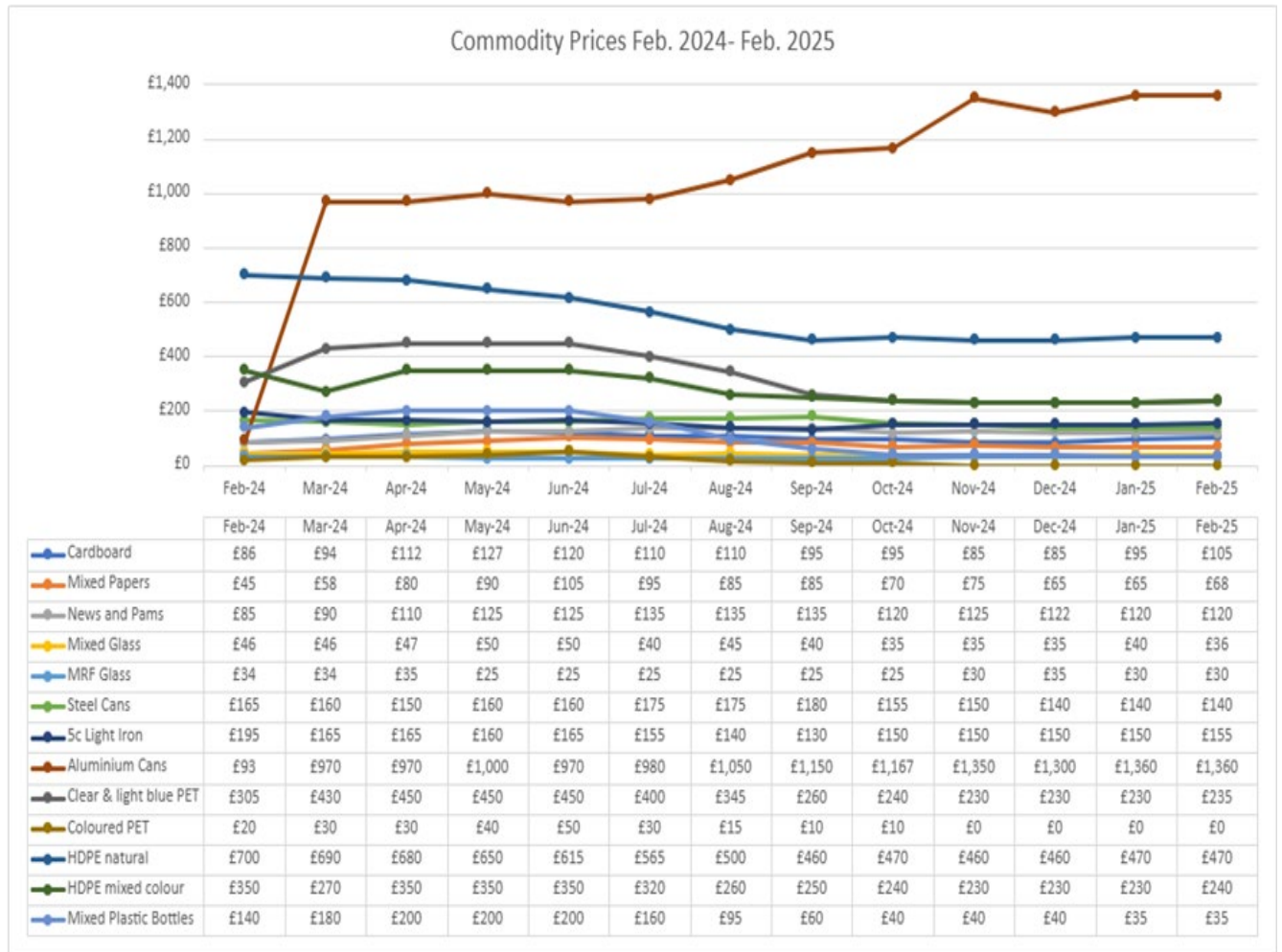


Figure 4: Commodity Prices Feb 2024 – Feb 2025

5.1. Figure 3 details the movement in commodity prices over the last 12 months (Feb 2024 - Feb. 2025) and highlights in particular the depressed value in the plastic markets with PET (drinks bottles) becoming less valuable and a sharp drop in the value of HDPE Natural (milk containers) which has seen prices decrease from £700 per tonne in Feb 2024 to £470 in Feb 2025. Plastic commodities made up 12% of DMR collected from the kerbside, excluding soft plastics.

5.2. Fibre (paper and cardboard) constitutes 46% of DMR loads and the market continues to see a high demand from the Far East as concerns remain over USA tariffs and associated shipping availability. This has resulted in a post-Christmas movement of volumes into the European market with cardboard prices going from

£85 to £105 between Dec. 2024 and Feb. 2025. Uncertainties remain about the sustainability of the situation.

- 5.3. Glass makes up 20% of the Authority’s DMR loads and market prices have remained relatively stable. Metals, especially aluminium, have seen a remarkable price increase despite constituting only 3% of DMR loads.
- 5.4. In the second and third quarters of the year, the Authority benefitted from a small increase in commodity prices. However, this trend started to decline in the first two months of quarter four. Due to volatility in the market and global geopolitics, it is hard to be confident with future forecasts.

DMR Net Basket Price				
	Forecast	Actual	Forecast	Actual
	23/24	23/24	24/25	24/25
Q1	£43.00	£43.26	£39.00	£36.17
Q2	£43.00	£41.89	£39.00	£56.04
Q3	£43.00	£40.48	£35.00	£49.38
Q4	£43.00	£41.11	£35.00	£35.78

Table 5

- 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 Q4 figure is the average of commodity prices published on the market index - Letsrecycle for October to December 2024.

- 5.6. The annual average value for 24/25 was £44.34 - a 19% increase compared to the budgeted annual average price of £37.00.

6. SPECIALIST RECYCLING UPDATE

- 6.1. This section provides an update on the specialist recycling services primarily collected at the Authority’s RRCs. These provide residents with solutions for materials that are difficult-to-recycle and impractical to collect as part of the kerbside collection service provided by Boroughs.
- 6.2. A recent benchmarking exercise confirmed the NLWA accepts a wider range of recycling and reuse materials across our network when compared to other providers within London.
- 6.3. Officers working closely with colleagues from London Energy (LEL) are working hard to increase the range of materials even further. This spring Summers Lane RRC will begin a trial with Toys4life to collect and rehome toys within the UK and, where needed internationally, that would otherwise have gone for recycling or disposal. A wide range of toys and material types will be accepted through the service, including whole toys and games as well as loose Lego bricks.



Figure 5: Toy banks at Summer Lane RRC

- 6.4. NLWA and LEL are also trialling a partnership with The Bike Project, the introduction of bike donation drop-off points at all LEL operated RRCs. The Bike Project will rescue unwanted bikes donated at the RRCs for reuse, repairing any damaged bikes before donating them to refugees and those seeking asylum that reside in north London, enabling them to attend appointments and access essential services without the additional burden of transport costs.
- 6.5. LEL are supporting the initiative by collecting, tagging and transporting donated bikes from across the seven RRCs to a single LEL-operated site for collection by The Bike Project. Promotional material will be released in April to launch the service and encourage uptake by residents. Officers intend to keep Members updated on the progress of the service, including the number of bikes successfully rehomed in each of the north London boroughs, and provide a regular update in future Authority papers.

Expanded Polystyrene

- 6.6. From April 2024 to February 2025, 10 tonnes of Expanded Polystyrene (EPS) have been captured for recycling. This is 3 tonnes more than the amount of EPS material collected for recycling in 2023/24.
- 6.7. Since the scheme commenced in March 2023, 17 tonnes of EPS, a lightweight but difficult to recycle material, have been captured for recycling across the seven RRCs.

Hard Plastics

- 6.8. The hard plastics scheme, which recycles materials such as plastic toys, buckets and garden furniture, has captured 266 tonnes across four sites; South Access Road

RRC, Hornsey Street RRC, Regis Road RRC and EcoPark RRC. This is enough buckets to fill three full-sized Olympic swimming pools.

- 6.9. The toy reuse scheme, referenced above, will aim to manage some of this material further up the waste hierarchy by diverting toys that are in a good condition for reuse.

Mattresses

- 6.10. In 2024 (calendar year), 100,594 mattresses were captured for recycling across the RRCs and waste transfer stations. This is an 11% increase on the number of mattresses captured in 2023 (90,673) and is an average of 8,383 mattresses per month. Including January and February 2025, the grand total of mattresses recycled since 2021 is 340,566.

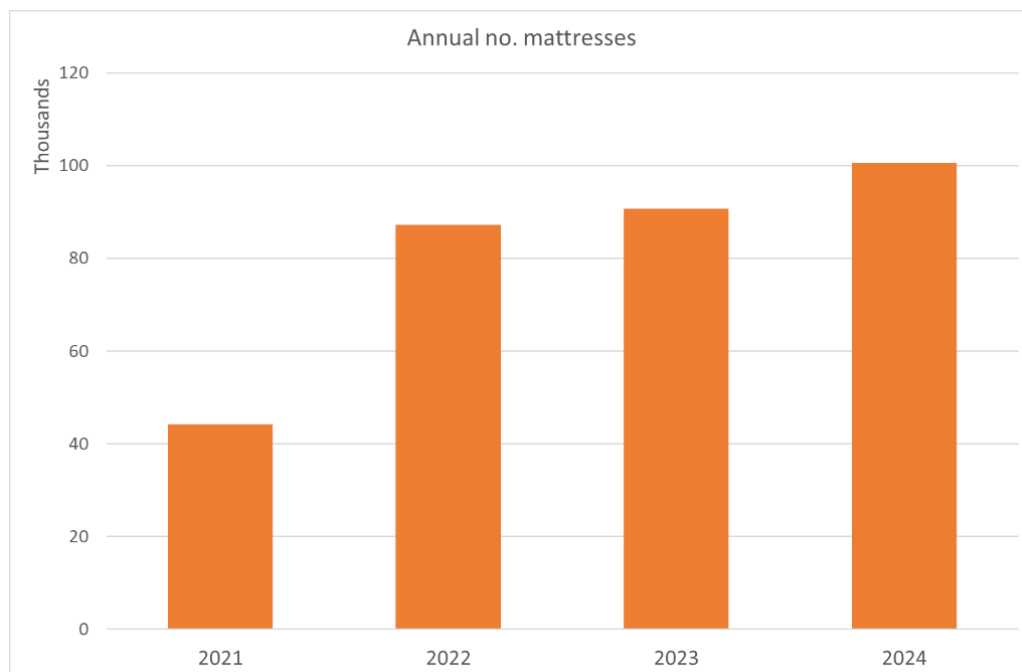


Table 6 - Mattresses collected Annually

Carpets

- 6.11. Up to February 2025, over 214 tonnes of carpet have been captured for recycling since the scheme commenced in November 2023. This is an average of 17 tonnes per month. 27 tonnes of carpet have been captured at the EcoPark RRC since it opened in July 2024.
- 6.12. LEL continue to maintain a high recycling rate for the material with just 5%, primarily the difficult-to-recycle carpet underlay, being managed through energy from waste.

DIY Reuse

- 6.13. In 2024/25, 50 tonnes of DIY materials were taken by north London residents for reuse from South Access Road and Summers Lane RRCs. In total, year-to-date, the scheme has prevented 140 tonnes of DIY materials from becoming waste.
- 6.14. Paving slabs, tiles, bricks and cement bags were the most common materials taken by residents for reuse by weight in the last two quarters of 2024/25. Bulky items commonly captured for reuse and rescued by residents include baths, fence panels and toilets.

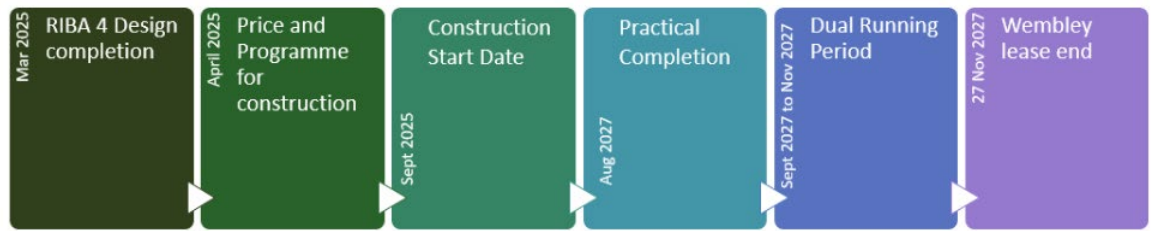
Vapes (E-cigarettes)

- 6.15. 830 kilograms of disposable vapes (e-cigarettes) have been separately captured for recycling across our RRCs since Summer 2024. This is equivalent to approximately 39,500 individual disposable vapes diverted from litter, street and kerbside bins.
- 6.16. Disposable vapes are collected in non-flammable, fire resistant bins from all seven RRCs through a contract between LEL and the European Recycling Platform (ERP), who is also NLWA's compliance scheme operator for Waste Electrical and Electronic Equipment (WEEE). Due to the size of vapes, it takes longer to fill a bin meaning collections by ERP are not frequent. Therefore, there is a greater lag between when a resident deposits disposable vapes to when this is weighed and sent for recycling. The latest available tonnage data is from February 2025.

7. GERON WAY UPDATE

- 7.1. In 2027, Geron Way will replace the former Hendon Transfer Station and current leased facility at Wembley (Hannah Close) as the west-of-area transfer station serving primarily Barnet and Camden. Officers are working with LEL and Barnet colleagues to agree sign-off of RIBA Stage 4 designs. The Settlement Agreement for the project requires all three signatories to formally agree these designs before construction begins. Barnet is planning to commence construction of the site in the Autumn of 2025.
- 7.2. Officers and LEL colleagues have made significant progress in reaching a design capable of meeting the service need. Challenges around site manoeuvrability and the operability have been largely resolved.
- 7.3. Some concerns remain outstanding. These are primarily linked to technical requirements around the fire suppression, odour control, drainage, effluent management and noise abatement systems. LB Barnet colleagues are working with officers to support an LEL pre application enquiry with the Environment Agency and the insurance market to determine those requirements, which will be incorporated into the design ahead of the construction starting.

7.4. Figure 5 below details a high-level timeline for the project. Note that officers are working towards design completion in April 2025.



8. EQUALITIES IMPLICATIONS

8.1. There are no equalities implications associated with this report.

9. COMMENTS OF THE LEGAL ADVISER

9.1. The Legal Adviser has been consulted in the preparation of this report.

10. COMMENTS OF THE FINANCIAL ADVISER

10.1. Chargeable household waste and Non-household waste are both charged to boroughs separately to the levy. Charges for the financial year are based on budgeted tonnage and boroughs pay each month. After the end of the financial year, the Authority will calculate the actual charge. If a borough has delivered additional tonnes, it will be charged the difference. Where less tonnage has been delivered a refund will be issued. A tonnage forecast and a calculation of the forecast costs was included in the Finance Update paper reported to the February meeting.

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Reference used in the report

Population growth statistics - [UN World Urbanization Prospects](#).