



Sector opportunities and
CIWM policy recommendations
for resources and waste

Let's not waste the next four years

This CIWM paper highlights the key opportunities for the resources and waste sector to drive job creation, economic growth and resilience within a circular UK economy.

September 2025



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Summary

In summer 2025, CIWM's Policy & Innovation Forum commissioned and endorsed an independent review of the UK's policy landscape from a resources and waste sector perspective.

The report identifies the most significant opportunities for the sector to drive the transition to a circular economy, and to contribute to the Government's evolving 'Plan for Change' agenda.

The Review's analysis has enabled CIWM to expand and highlight ten recommendations for the sector and for the UK Government to deliver on their mutual priorities of jobs, growth and investment, and to take full advantage of the drive towards net zero and a circular economy.

The detailed report consists of four sections. It was conducted by policy expert, and previously Chief Strategic Advisor at WRAP, Patrick Mahon, and reviewed by CIWM's Policy and Innovation Forum.

Part 1:

Summarises the UK Government's domestic policy agenda and the most relevant policy initiatives to the resources and waste sector. (Also cognisant of the policy agendas of the UK's devolved administrations.)

Part 2:

Assesses progress of the Resources and Waste Strategy 2018 (for England) since CIWM's 2024 review.

Part 3:

Summarises the resources and waste sector's priorities to enable progress towards greater resource efficiency, net zero and a circular economy.

Part 4:

Presents a brief gap analysis and highlights ten recommendations for Government and sector stakeholders.

UK Government's Policy Agendas

The Government is focused on implementing its Election 2025 Manifesto commitments and 'Plan for Change' — structured under five missions: economic growth, clean energy, education, crime, health — underpinned by economic stability, secure borders and national security.

There are seven key domestic policy proposals under development that are of direct relevance to the resources and waste sector:

1. A new Circular Economy Strategy for England, being developed by the Circular Economy Taskforce. Five sector roadmaps are also planned. Due to publish (for consultation) autumn 2025;
2. Delivery of the UK Net Zero Strategy and the 2050 net zero goal. The Net Zero Council is overseeing the development of sector roadmaps, including for resources and waste;
3. The UK's Modern Industrial Strategy, launched in June 2025 is a 10-year commitment and partnership. Delivery and monitoring of the strategy and roadmaps for 8 priority sectors is being overseen by the Industrial Strategy Advisory Council. It promotes resource efficiency and supply chain resilience, linking to the forthcoming Circular Economy Strategy;
4. A Critical Minerals Strategy is due out in 2025. It is expected to have explicit links to the Industrial and Circular Economy Strategies;
5. Skills England assesses current and future needs and identifies how to enhance skills and accelerate access to talent for priority sectors and occupations. Of those most relevant to the resources and waste sector, these include clean energy, digital, construction and engineering. Its work enables relevant sector opportunities linked to the Industrial and (likely) Circular Economy Strategies;
6. In April 2025 Dan Corry completed an independent review of Defra's regulatory landscape, including proposals on resources and waste regulation better aligned to economic growth and nature recovery;
7. Major residual waste policy and regulatory measures are currently in consultation, including reform of the Landfill Tax (HM Treasury), inclusion of energy from waste in the UK Emissions Trading Scheme (DESNZ) and decarbonising the residual waste stream (Defra).



Part 2:

Mapping the policy progress of the Resources and Waste Strategy 2018 (for England)

In 2024, CIWM conducted a Review of the Resources and Waste Strategy, setting out ten clear policy opportunities.* Since then:

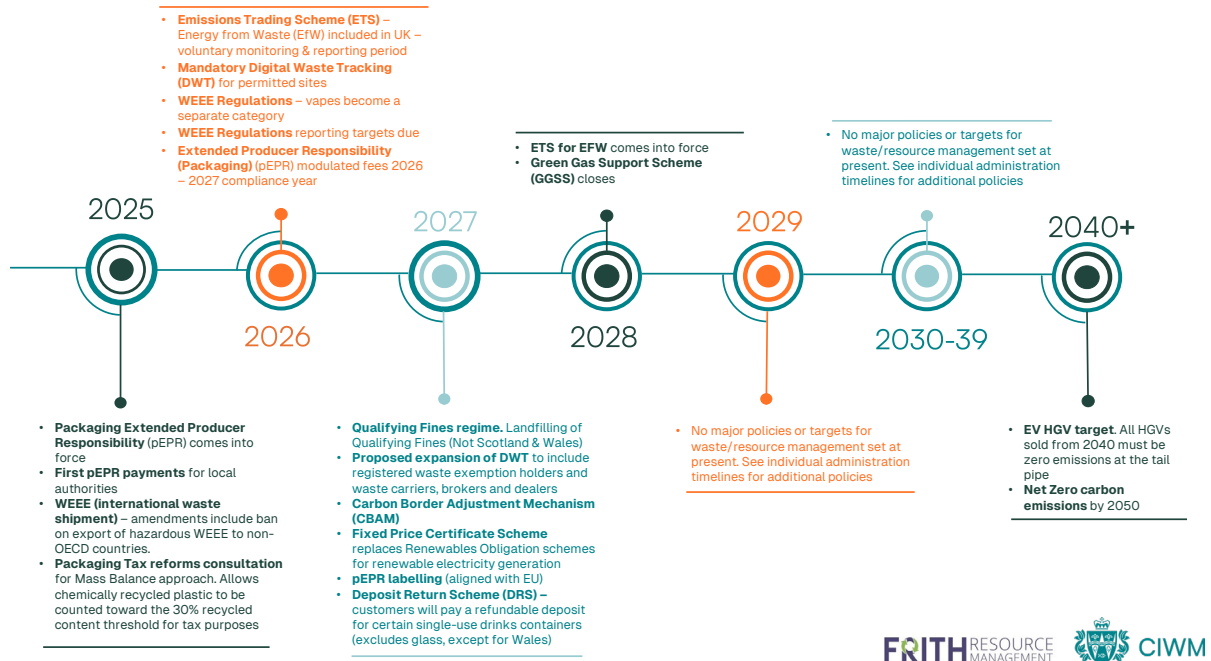
- **One opportunity has been fully implemented:** the creation of a cross-Government taskforce on resources (the CETF);
- **Four are in the process of being implemented:**
 - Create a new strategy;
 - Implement the existing resources and waste strategy measures;
 - Reform key sector regulation; and
 - Introduce targeted economic instruments.
- **Five have not been adopted so far:**
 - Focus on critical green skills;
 - Introduce EPR for new waste streams;
 - Set targets for the top half of the waste hierarchy;
 - Price raw materials to include negative environmental externalities; and
 - Strengthen eco-design and waste prevention.

The graphics on page 6 show the key regulatory and policy measures currently proposed across the UK and presenting challenges and opportunities for our sector.

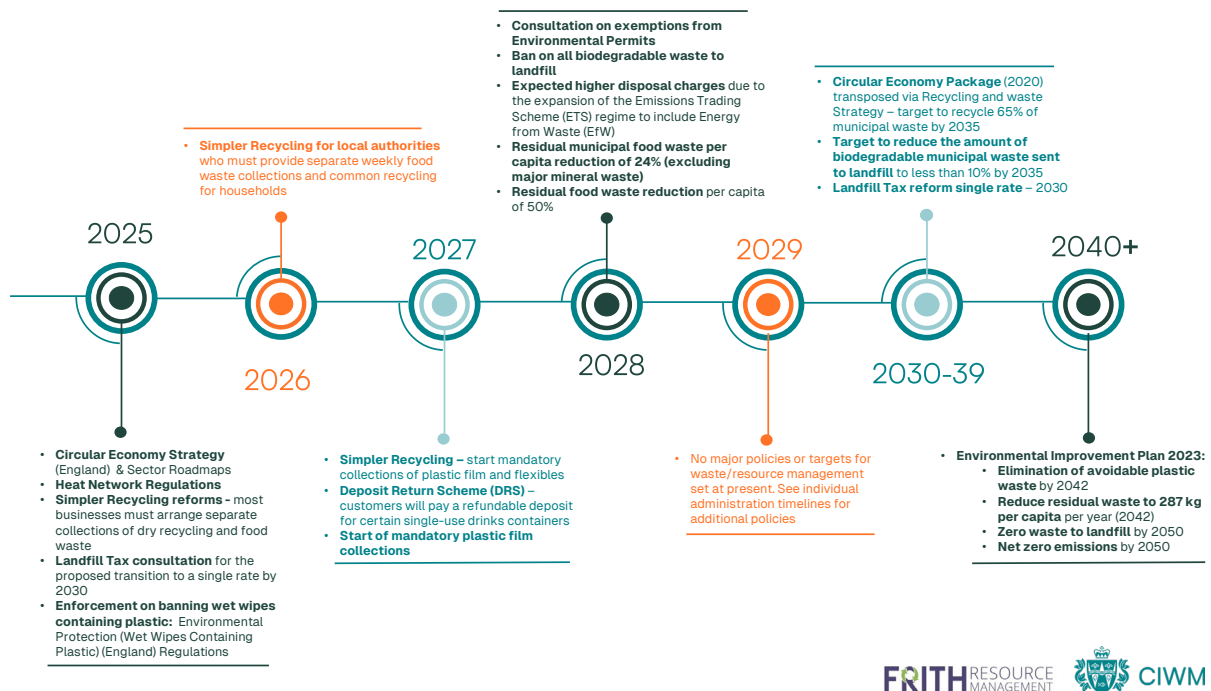
NB: Policy milestones for Scotland, Wales, Northern Ireland, the Republic of Ireland and for the EU are set out in the appendix on pages 10-11.

* (www.ciwm.co.uk/policyasks)

UK Waste Policy Milestones



England Waste Policy Milestones



Circular economy/resource and waste sector priorities

Our sector's priorities were assessed from the following:

- CIWM's priorities – as set out in:
 - CIWM Strategy;
 - Recent Presidential Reports (2021–2025), covering eco-design, end-of-waste regulation, what the sector does (world-class services), green skills, and lost opportunities to a circular economy;
 - Other recent reports – energy from waste's inclusion in the UK Emissions Trading Scheme, sector skills and fiscal policies.
- Other sector stakeholder perspectives, including recent reports from:
 - **CBI**: 'the green economy is growing three times faster than the rest of the economy';
 - **ESA**: Vision for 2040;
 - **Suez**: Seven steps to mainstream repair and reuse;
 - **Green Alliance**: Five tests for the new Circular Economy Strategy for England, et al;
 - the **Aldersgate Group** – six priority actions on circularity; and
 - **Circle Economy**: Circularity Gap Report for the UK: we are only 7.5% circular.
- Four wider global contextual issues were also assessed:
 - US and China relations (including wider global tariffs)
 - Ukraine and other conflicts
 - UK-EU relationship
 - UK local election results and political trends.

This is what we do – sector overview

The UK resources and waste sector provides a regulated utility service that is essential for a thriving economy and high-quality environment. It employs over 145,000 people and has a turnover value of c.£23 billion.

The sector manages waste arisings of 70.8 million tonnes per annum generated by households and businesses, with a total recycling rate of c.60% (45% for household waste only). There are over 12,000 permitted and regulated operational waste and recycling sites and facilities across the UK.

Local authorities are responsible for household waste and recycling collections, the provision of household waste recycling centres (civic amenity sites or 'tips'), disposal and street cleansing services, spending c.£7.5bn p.a. on service delivery.

The private sector and supporting supply chain provides collection, recycling, treatment, disposal and associated services to councils and businesses. It consists of over 7,000 national, regional, local and specialist businesses, including materials brokers and dealers.



Part 4:

Brief gap analysis and ten recommendations

Let's not waste the next four years: this paper uses the recent policy landscape report's evidence and gap analysis to set out sector opportunities and CIWM's policy recommendations for resources and waste.

Relevant gaps and challenges:

- The UK Government is running several large policy reviews in parallel – it will be an important challenge for the Government to keep them aligned.
- The Circular Economy Taskforce recognises the importance of circular thinking at an early stage of policy formulation – but the extent to which the other key review bodies (Net Zero Council, Industrial Strategy Advisory Council, Skills England, etc) do the same may present a gap and a challenge for Defra, Government and the resources and waste sector.
- The UK Government is creating multiple sectoral roadmaps for different purposes – will these be sufficiently joined up?
- The wider context presents opportunities and threats.
- New US vs China and global tensions and policies, along with the impacts of the Ukrainian war and other conflicts, emphasise the value of greater UK resource resilience.
- Recent local and by-election results and the UK and wider political landscape could lead Government to refocus away from the advantages of the 'green agenda'.
- Will the new Circular Economy Taskforce/ Net Zero/ISAC/Skills England policy agendas be properly integrated and coordinated with the delayed implementation of the Resources and Waste Strategy 2018 reforms?

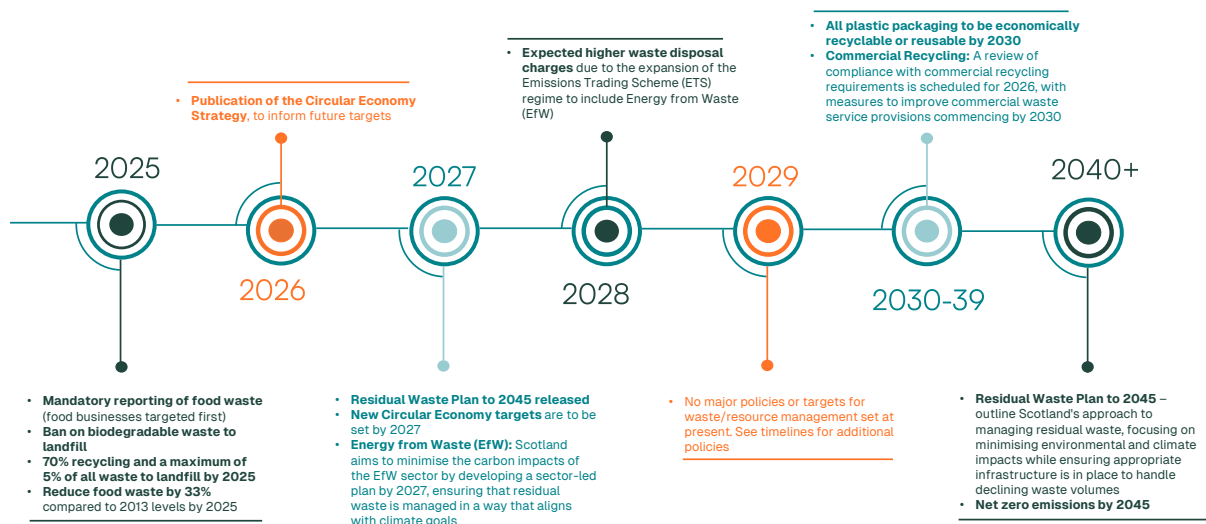
Based on the Resources and Waste Policy Landscape Review, CIWM sets out ten recommendations for the sector and UK Government to deliver on shared priorities of jobs, growth, and investment, to take full advantage of the drive towards net zero and a circular economy.

The forthcoming Circular Economy Strategy and sector roadmaps present clear opportunities to embed many of these recommendations as the key vehicle for policy implementation. CIWM and its members will continue to work with government and stakeholders to drive these opportunities forward.

1. The Circular Economy must be central to the Government's thinking, since there is clear evidence that it drives economic growth and jobs, cuts carbon emissions, and so directly supports the Government's first and second missions of growth and clean energy.
The resources and waste sector provides the bedrock for a circular economy and a sector roadmap with clear metrics must be developed and delivered as a priority.'
2. Given the encouraging level of strategic review and planning, **cross-Government policy integration continue to be vital** across the resources and waste, energy, industrial strategy and net zero spheres, to maximise the opportunities for growth and to avoid unintended consequences and burdens on business and local authorities.
3. **Skills England has a clear added-value opportunity** to broaden its focus and to incentivise critical green skills initiatives, helping to deliver more jobs and strengthen initiatives in the resources and waste sector.
4. **Improved UK resource resilience should remain a focus area for the Government in partnership with the resources and waste sector**, with clear long-term advantages to the UK economy in the context of global political and economic instability.
5. **Applying Extended Producer Responsibility (EPR) for new waste streams, including WEEE, batteries, textiles and mattresses, should remain a priority**, once the principle has been successfully proven. EPR schemes and policies must drive more reuse, repair and higher-quality recycling, enabled by continually improving scheme design.
6. **Reuse and repair needs further, and specific, policy support** including the establishment of clear targets and responsibilities throughout the supply chain to encourage take-up and scaling.
7. **Dan Corry's Review of Defra's Regulatory Landscape** (April 2025) provides an opportunity for the resources and waste sector to work with regulators for more efficient and effective outcomes. **Specifically, regulators should work with sector bodies on priorities** including fostering innovation and cultural change in environmental regulation (Corry Rec. 10), a new Strategic Policy Statement for sector outcomes (Rec. 2), and tougher, faster penalties for deliberate and persistent non-compliance (Recs. 16 & 18).
8. **The proposed increased cost of EfW, arising from bringing it into the UK ETS in 2028, must be reflected in packaging EPR fees to ensure the full application of the 'polluter pays' principle.** Producers of unrecyclable fossil-fuel packaging must bear financial responsibility for the full carbon impacts of their products.
9. **The Resources & Waste Strategy 2018 reforms must to be fully implemented to ensure improved economic, social and environmental outcomes.** This does not just apply to pEPR, Simpler Recycling and Deposit Return Scheme, but also to stalled reforms of the Waste Carrier, Broker and Dealer registration system and full application of Digital Waste Tracking.
10. **Tackling waste crime requires greater focus and resources.** Waste crime at all levels is a £1 billion drag on the UK economy. It causes harm to communities and environments, undermines the professional sector, and restricts local growth. Swift implementation on measures such as Carriers, Brokers and Dealers regulations, full Digital Waste Tracking, and Landfill Tax Reform will help close regulatory gaps currently exploited by waste criminals, often in plain sight.

Appendix

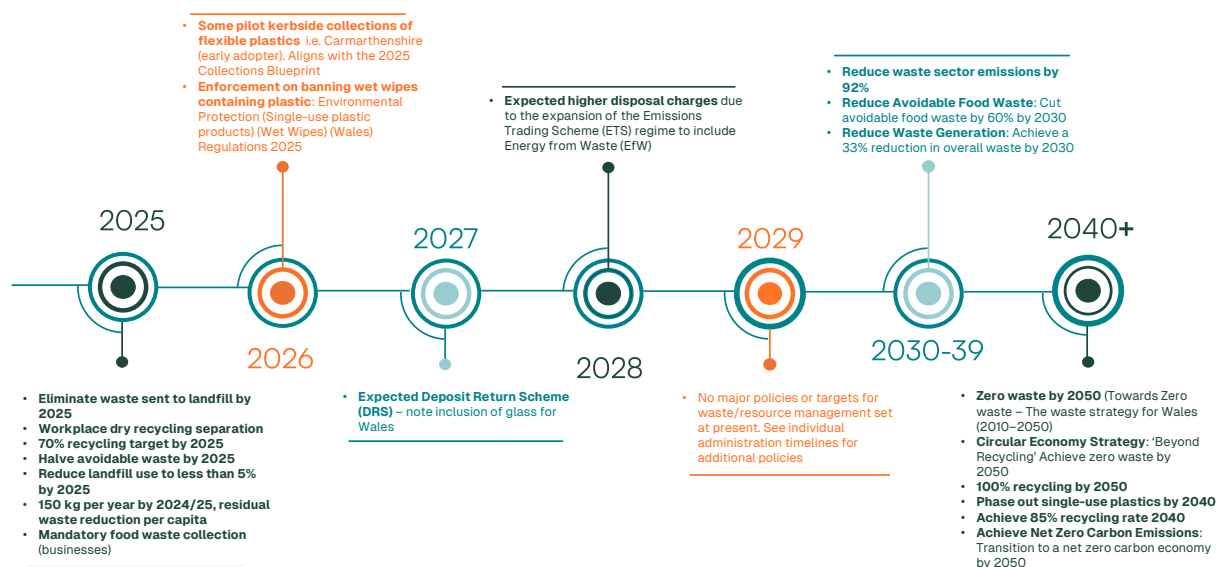
Scotland Waste Policy Milestones



FRITH RESOURCE MANAGEMENT



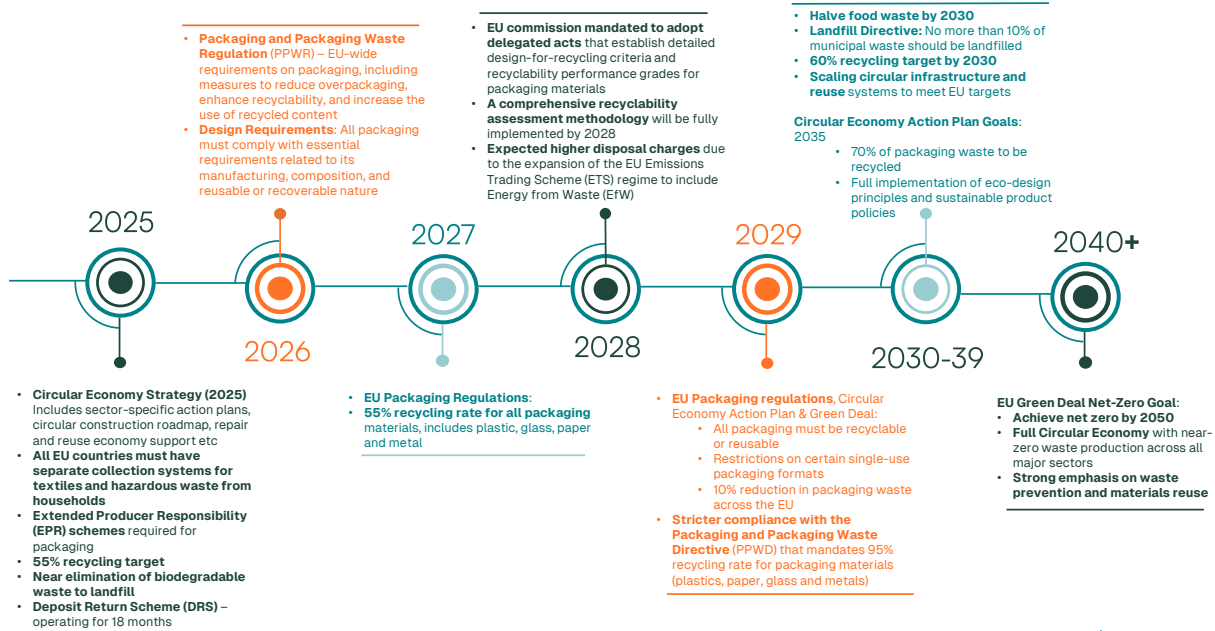
Wales Waste Policy Milestones



FRITH RESOURCE MANAGEMENT



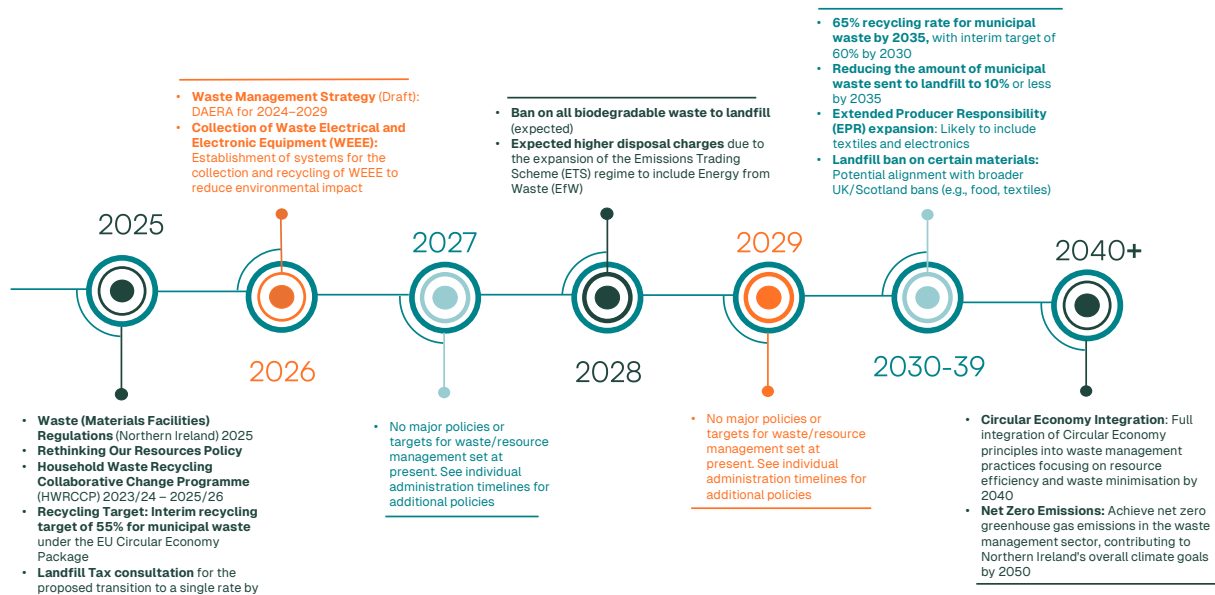
Ireland Waste Policy (including EU) Milestones



FRITH RESOURCE MANAGEMENT



Northern Ireland Waste Policy Milestones



FRITH RESOURCE MANAGEMENT





For further detail, CIWM members can go to the full report [here](#).

Or please contact communications@ciwm.co.uk to discuss practical ways of supporting and progressing the recommendations, or with any other queries.