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Advisory Group

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## UK WASTE MANAGEMENT Regulatory Development

Major regulatory developments aimed at environmental improvement

- Landfill Directive (landfill diversion targets; pre-treatment requirements)
- Waste Electrical and Electronic Equipment Directive
- Recycling and Recovery targets
- Increasing Landfill Tax
- etc

In order to meet above, up to £30bn will be invested in new waste Management facilities in UK by 2020

Unique partnership approach between private and public sector to fund and deliver above

- PFI and PPP projects

## UK WASTE MANAGEMENT Renewable Energy

• As a result of government incentives

(Renewable Obligation Certificates)

- power generation from landfill gas has increased from 1185 GWH to 4004 GWH over past year years
- majority of landfill gas is now captured and beneficially used
- represents around 30% of total UK renewable energy
- energy from waste represents additional 7% of UK renewable energy

## UK WASTE MANAGEMENT Financial Performance

Regulatory developments have created major financial opportunities

- environment is good for business

As an example, Viridor Waste is one of major waste contractors serving UK market

- £350m turnover and £45m profits
- profit has grown by over 20% each year since 2000 and is projected to continue to grow
- market value has grown from £200m to nearly £1bn

## UK COMPETITIVE ADVANTAGE Environmental Sector

- The UK's legislative & regulatory structure
- Better regulation
- Recent track record of environmental improvement
- Education
- Innovative approaches & technologies
- Capabilities across the value added chain
- Pragmatic solutions to customers' specific problems and requirements
- Partnership approach
- Global leadership in financial services
- Professional services