



# VISION 2020

The future of food waste recycling



PDM GROUP

**ReFood**  
pure bioenergy

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## FOREWORD BY ANDY SMITH

When preparing to draft this foreword, I started to look back at how the food waste recycling sector has changed and developed in recent years.

When I stop and consider even the last 15 years, I see an industry which is almost unrecognisable – moving away from its traditional offering of rendering to suddenly developing cutting-edge techniques which not only give different options for the disposal of food waste but techniques which also use waste to generate renewable energy.

As a sector we don't give ourselves enough credit for how we have transformed an age-old industry into one which has a long and secure future. We must start shouting louder about our achievements. A new administration brings new opportunities and challenges. On one hand, the new Government's commitment to Anaerobic Digestion and reducing waste has to be applauded, but the fact that there will be widespread spending cuts means that, as an industry, we need to take charge of our development, growing our importance and voice.

At present, we are reaching a tipping point, with mainstream acceptance of food recycling among businesses and consumers closer than ever before. At PDM, we feel all the ingredients needed for success are still not in place and that the industry needs to come of age to ensure the capacity, investment and infrastructure are in place to meet national demand. For this to happen, industry peers will have to come together and work for the good of the sector, and in doing so, create and shape the future of the industry.

This manifesto, and the ideas contained within it, are our thoughts on what we believe needs to be considered if the sector is to make its good intentions a reality. We want to provoke debate amongst the industry, get people thinking about the future of the sector, the direction we need to take and what needs to be addressed so the sector is galvanised and ready to achieve zero food waste to landfill.

Although, it must be noted, this document is far from a finished piece of work. Indeed, that was never our intention. Rather, we have suggested a number of options which are merely a starter for ten – a stake in the ground which we hope will not only provoke a wide-ranging discussion and engage thinking in the industry but more importantly, will result in action and improvement that will ultimately propel the sector to the next level.

My team and I look forward to meeting, engaging and debating the contents of this manifesto with interested parties over the coming weeks and months. If you have any comments, would like to add to our ideas or have views you would like to share, my team and I would like to hear from you. Please contact us at [vision2020@pdm-group.co.uk](mailto:vision2020@pdm-group.co.uk)

**Andy Smith**  
Chief Executive Officer, PDM.

# A LANDFILL BAN

## OVERVIEW

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- Legislation is needed to ban food waste from landfill, fuelling participation among consumers and businesses
- Already legislation is in place for the disposal of WEEE and batteries but the tonnage of UK food waste means that food waste is a much bigger problem
- The sector needs to be lobbying for change to ensure it's represented at the heart of future discussions
- Any change in policy needs to be made swiftly but introduced on a staggered basis – ensuring the infrastructure and processes are in place to cope with a total ban



PDM believes that the only way to truly maximise the impact and uptake of food waste recycling in the UK is for legislation to be introduced which bans food waste from landfill. This approach has successfully worked in other European countries such as Germany, Sweden, Norway and Denmark where both householders and businesses have no other option but to recycle their food waste. Indeed, recent research has shown just how successful this approach has been, highlighting that the carbon footprint of food waste management in the UK, on a population adjusted basis, is five times higher than in Germany.

It seems strange that there is legislation which governs the disposal of WEEE and waste batteries but there are no regulations in the UK which outlaw food waste to landfill. This is despite the tonnage of food waste in the UK being far greater than either batteries or waste electrical and electronic equipment.

Banning food waste from landfill would give consumers and businesses no other option but to adopt food recycling as a core part of their everyday life. This would also go some distance to helping the UK meet its obligation under the Landfill Directive. Such a ban would be timely following the figures released in July 2010 pointing to the fact that the UK has only eight years before landfill space is full.

At present, producer responsibility in food is not practical, however, we feel that legislation which bans food waste from landfill is crucial to the development of the food recovery sector. We would like to see the industry lobbying as one for the introduction of such a ban, ensuring it is at the centre of any discussions and helping to drive change.

Any legislation change needs to be swift and focused. Recent introduction of environmental directives have been hampered by a long, drawn-out introduction phase and the enthusiasm and momentum for the new law has died long before launch.

PDM would like to see an industry-agreed timetable for the implementation of such legislation with a speedy adoption into law which is then staggered, giving affected parties the time to amend their processes and operations. Such an approach would also give the food recycling sector the opportunity to grow its infrastructure to handle a total food waste ban.

To ensure rigour and fairness for all parties involved, such measures would need to be predicated on a transparent, academically peer reviewed framework of 'carbon foot printing' standards. This would take into account the variety of end technology options in place as well as the corresponding complexity in the intermediate handling and logistics phases as far as the impact of energy is concerned.

# EDUCATING THE GENERAL PUBLIC

## OVERVIEW

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- Sector needs to educate consumers and businesses directly
- Education needs to start in school
- Investing time to understand European recycling behaviours would put the industry ahead of other recycling sectors and raise its profile



Every time a new piece of environmental legislation comes into force in the UK, there is an ongoing and wide ranging debate around the lack of consumer and business education and the impact this has on participation. Legislation such as the WEEE Directive and the recently introduced Batteries Directive are prime examples of this, with awareness among target audiences extremely low.

Our proposed landfill ban gives consumers and businesses no other option but to comply. This approach would also quickly reduce carbon footprint. But such a change in law will take time to come into effect and as a sector, which needs to grow both in size and importance, we cannot wait for this to happen.

### DIRECT EDUCATION

We believe that direct education is key and the food waste sector cannot leave this role to the Government or other parties. Despite local authorities operating their own food waste collections, householders are not being educated about why they need to recycle food and the benefits of doing so. Therefore, the sector should communicate directly with the householder through a variety of methods including local press, road shows and direct mail. The Love Food, Hate Waste campaign run by WRAP in recent years is a great example of direct consumer education and its success should be used as a springboard to encourage others in the sector to talk to consumers directly.

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### NATIONAL CURRICULUM

The sector must take this educational approach further and PDM would like to see the industry getting actively involved in the National Curriculum. Doing so will mean that consumers are captured at a young age, giving the sector more time to influence their behaviour.

### WORKING PARTY

This approach already works across many countries on mainland Europe and is one of many reasons that recycling seems to be ingrained in the psyche of other Europeans. While business collaborations already exist between UK companies and European counterparts, we would like to see a working party from the UK industry investigating how markets such as Germany have managed to foster a proactive approach to recycling among businesses and consumers. Such knowledge would not only give valuable information for the food waste recovery sector to act upon, but it would also demonstrate the ambition of the sector against other industries in the recycling arena.

Finally, an educated general public would then have the knowledge to put pressure on manufacturers to ensure retailers reduce key sources of food waste.

# PLANNING

## OVERVIEW

- Designate redundant brownfield sites as ripe for developing into food recycling plants – utilising the current infrastructure and minimising objection
- Need to reconsider the planning laws to speed up the approval and build process
- Network of local solutions is the future of food recycling
- Food waste should be recycled within a 50 mile radius of where produced
- Develop a site identifying tool similar to the Location Planning Analysis Tool



To cope with the UK's growing food waste problem, it's apparent that large scale investment will have to be made to bring the current infrastructure up to capacity. The small smattering of plants across the UK simply cannot cope with the volume of food waste that the UK is generating.

PDM believes that the future of the UK's food recycling infrastructure lies in a network of local facilities which will handle food waste produced within a 50 mile radius of the facility. Currently food waste has to travel many miles to reach the point of disposal, creating unnecessary road miles, CO<sub>2</sub> emissions and fuel costs. This practice must end if the sector is going to be truly sustainable – both in terms of its environmental impact, as well as its commercial viability.

To aid such a local network, PDM believes that planning rules and procedures need to be reconsidered and relaxed – allowing quicker construction of facilities, as well as a greater array of locations where plants can be based.

This could be achieved through the introduction of a system PDM is calling 'Automatic Selection.' Through this approach, sites such as dormant brownfield sites, which have held commercial units and factories in the past, should be automatically designated for development into food recycling facilities.

Automatic Selection would bring a number of benefits. Infrastructure such as road access will already be in place, and

building on the site of previous commercial development should mean less objections from local residents – often a costly and time consuming part of the planning process.

PDM would like local authorities to identify suitable sites within their jurisdiction and communicate availability to food waste companies. As part of this process, the local planning office should be involved from the outset, ensuring any application is looked upon favourably, reducing the time of the planning process.

This identification process could be aided by the adoption of a nationwide process similar to the Location Planning Analysis Tool which has been developed by Advantage West Midlands and WRAP. The five-stage process has been developed to identify suitable sites in the West Midlands for waste infrastructure.

PDM believes that such an approach would ease the identification of sites and may well foster LA/recycling development partnerships. Similar schemes worked in the late 80s and early 90s when councils developed Enterprise Zones to attract new businesses to their areas.

Taking steps to make the planning process less cumbersome would result in quicker build times and a faster growing network of facilities. Finally, such an approach would take sites which are lying dormant and redevelop them, creating local jobs and regenerating areas.

# PORTFOLIO OF SOLUTIONS

## OVERVIEW

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- Industry needs to promote a range of recycling techniques not just Anaerobic Digestion
- Government needs to set targets around technology for the sector to meet
- Sector needs to develop processes which can safely and adequately handle any doomsday scenario
- Positive peer pressure is needed to encourage adoption of portfolio of options



PDM believes that the food waste sector needs to offer its clients a range of recycling processes, including a variety of techniques to handle crisis situations such as Bovine Spongiform Encephalopathy (BSE) and Foot and Mouth Disease (FMD).

At present there is a huge focus on AD both from the industry and legislators. But this approach could be putting too many eggs in one basket and will not offer adequate solutions for a food chain crisis. An over reliance on AD will also mean the industry is potentially creating a further waste stream with a saturated market for fertiliser.

Therefore, the food waste sector needs to invest in an infrastructure which offers a portfolio of solutions for handling all types of food waste. We would like to see targets being laid out by central government, challenging the sector to develop, implement and offer a range of differing techniques – driving innovation and development rather than prescribing the solution and potentially stifling the development of new processes.

To make this happen, we believe the sector needs to educate legislators about the different techniques and solutions available – the pros and cons, as well as the performance and benefits. We would like to see greater research and understanding from legislators, allowing them to base decisions and approaches on up to date knowledge gained from the industry. This approach may enable funding and support to be provided to a range of food recycling technologies that will ensure we maximise end-of-life food as a resource, rather than a waste.

As a company which plays its part in the sector, we think that the development of the industry would benefit from positive peer pressure – with companies encouraging each other to take a portfolio approach and ensure that all parties in the industry are aware of and promote a range of solutions to customers, not just one.

# ENDING ISSUES AROUND HOUSEHOLD FOOD WASTE

## OVERVIEW

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- Issues around 'living' with food waste are turning consumers against food recycling
- Sector needs to find better storage solutions to neutralise smell and apathy
- Communal bulking of food waste could promote more inclusion in local communities as people don't feel they are living with their waste
- Uniformity around collections across council regions



In our experience, issues around storing food waste for collection, controlling odour and the collection frequency are the biggest drivers of opposition when it comes to household food waste recycling.

Therefore, if the sector is to see food waste recycling adopted as a mainstream habit – such as glass and newspaper recycling – the sector needs to take the lead and find solutions to make food waste less problematic for householders and businesses. We cannot rely on third parties to do this for us.

In our opinion, while it's not a core service provided by the sector, the industry needs to lead on driving the design and production of food waste receptacle options which better fit into consumer lifestyle and business operations. This is an important part of the process and the sector cannot leave the development of such solutions to external companies which do not understand the barriers to participation and the rigours of the food waste collection process.

We would like the sector to invest in collaborative partnerships with a range of related industry experts such as product designers, architects, kitchen manufacturers and even scientists, to help design receptacles which limit odour and blend better into the environments in which they are used.

At present, approaches to food waste collections and recycling differ from council to council. PDM believes collections and education could be improved by bulking-up neighbourhood food waste, where waste is disposed of in a ground level receptacle then stored underground. We think housing food waste in this manner would remove the issue of consumers living with their food waste, reducing apathy and driving community involvement.

# MINIMISING WASTE

## OVERVIEW

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- Prevention better than cure – industry should be promoting zero waste tolerance
- Holistic approach needed from all parts of the food chain
- More end uses need to be found from plastic recyclate
- Retailers and manufacturers should consider portion size and better incentives for consumers to reuse packaging
- 'Eat Today' fixtures could be introduced by retailers



In many sectors, the adage of prevention is better than cure rings true. The same applies in the food waste sector and we all have a role to play. Companies in the sector should first and foremost promote zero tolerance to food and packaging waste – encouraging a more proactive approach to food waste and recycling.

We want to see an holistic approach being taken by all links in the food production chain – from packaging designers, food manufacturers, retailers and material recyclers – in order to reduce both food waste and related packaging waste. This can only happen through collaboration and open dialogue between all parties.

Another positive step we would like to see is retailers and manufacturers considering the portion sizes that food is sold in, creating smaller products if possible and lower price points – reducing potential waste. We would also like this approach to happen to bulk-buy offers or multipacks. Such changes in approach, in our opinion, could be tied together with Government campaigns around obesity and healthy eating – harnessing the power of cross promotion and education.

'Eat Today' fixtures should also be encouraged by retailers. Food which is due to go out of date could be sold at a discounted price on a fixture which is a mainstay of the shop. The fixture could highlight that by purchasing in this way, the consumer is helping to minimise food waste and by ensuring the fixture stays in the same place day in day out, at the same time then consumers will know where to find such food.

Retailers need to incentivise reuse and recycling by rewarding consumers who adopt these habits. While loyalty points for bringing their own bags is admirable, we believe that retailers need to offer more to encourage consumers to adopt different packaging habits such as stocking a greater range of products which have reusable containers – for products such as soups and curries – which could receive monetary discounts when brought back to store to be recycled.

If packaging waste such as plastic is always going to be an inevitability, we would like the food waste sector to work more closely with container manufacturers, retailers and plastic recyclers to find better markets or second uses for recovered plastics.

# CAREERS

## OVERVIEW

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- To develop, the industry needs to attract the best people
- Sector needs to be proactive in promoting the opportunities that exist in the food waste recycling industry
- Need to change view of the recycling sector versus other more 'glamorous' industries
- Training grants and bursaries funded by the sector should be created



Any sector is only as good as the people that work within it and an industry can only develop if it's attracting fresh talent on a regular basis. With this in mind, we feel that the sector has to come together to proactively target and attract the best talent.

Given the origins of the food recycling industry from the rendering sector, it can be forgiven for not being the first port of call for ambitious graduates or skilled professionals. To counter this, we feel that the industry's reputation needs to be re-energised in the eyes of prospective employees.

The first step would be to create an army of ambassadors in the education sector who can sell the virtues of working in the industry to young people – highlighting the benefits such a job could bring, both personally and also to their wider community. To make this happen, we would like to see a dedicated outreach programme for teachers, lecturers and careers advisors which highlights the work the sector undertakes, the benefits it brings and the typical job roles which exist.

We also need the industry to present a unified approach to young people at the time when they are considering career options, either at GCSE or A-Level stages. Given the growing emergence of social enterprises in recent years, highlighting

to young people the impact on the environment that a job in the food waste recycling sector could have would be a timely message.

For those skilled workers looking for their next career move, a concerted outreach via trade media, trade bodies and trade shows would showcase the opportunities that the industry can offer and share the experiences of those who have already made the leap. We would also like to see recruitment agencies being targeted also, not only educating them about the sector and what it does, but also giving them the knowledge to spot candidates who have the right transferable skills.

We would also like to see the commencement of industry-driven bursaries and industry-wide internships. In Germany for example, there are many graduate schemes in place for those who want to work in the sector and there are a number of different bursaries and internships available. Such an approach would make a career in the sector more attractive and accessible, allowing more people to consider the advantages of working in the food waste recycling industry.

# FUTURE PROOFING

## OVERVIEW

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- UK needs to lead the industry, not follow other countries
- Self-imposed contribution to fund future development
- Attract best talent from across the world, creating a global centre of excellence



When it comes to environmental practices, it seems that the UK is often last when it comes to adopting legislation, technologies or procedures. But if the UK is going to lead the world in recycling food waste, this approach and attitude needs to change.

Steps need to be taken to make sure that the UK is leading the development of the industry, not following it. We should be identifying and creating the next solution to food waste and as a result, future proofing Britain's position as a leading player in both the European and global marketplace.

To achieve this we would like to see a self-imposed development contribution, paid by companies in the sector. Such a contribution could take the form of a percentage of profits, operating on a sliding scale dependent on company size. Given the current administration's focus on diverting food waste from landfill, for the first few years in practice, the funds raised by the development contribution could be matched by the Government to propel the sector.

As part of this, PDM would like to see this development contribution also used to attract the best talent into the industry from across the world. Funds could be invested into development grants and bursaries to fund research into new technologies and processes, promoting the UK as a centre of excellence and innovation. This approach will mean that Britain is where new technologies, techniques and approaches are developed first and then shared with the rest of the world.

Such an approach would require a spirit of collaboration in order to agree a clear vision from all corners of the sector.

# VISIONARY PANEL

## OVERVIEW

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- Standalone visionary panel needed for the industry, focused on the future of the sector
- Elected by the industry from companies big and small and supported by Government representatives
- Collaboration needs to be at heart of industry, emulating the success of the IT industry



In our opinion, the food recycling industry needs a forward thinking panel of industry stakeholders focused on safeguarding and developing the future of the sector. We recognise there are already a number of groups established representing different aspects of the food recycling industry but none are truly focused on shaping where the industry goes in the years ahead.

A great deal of thought and concerted effort will need to be made in order for the sector to grow and come of age, with the capacity to handle millions of tonnes of food waste and energy every year. Compared to other industries, ours is in its infancy so the idea of collaboration and sharing isn't as well developed as it is in other sectors. But if we look at how fast and dominant the IT sector has become in recent years, lessons in sharing ideas, information and platforms to aid development could be learnt by the majority in our sector.

We feel that setting up a specific industry group would give direction to the sector, ensuring where commercially possible, all parties are pushing in the right direction. The body would also be in charge of promoting education and shared learning – helping to position the UK as the market leader in the sector. A visionary panel could also help to deliver the changes suggested in this manifesto.

We envisage the panel taking the form of a compliance scheme – a feature of many other recycling industries. Companies in the sector could support it through a self-imposed development contribution and the body would comprise of both elected industry figures and representatives from Government departments.

# TAX BREAKS FOR COMPANIES THAT RECYCLE

## OVERVIEW

- We need to negate the argument of the cost of recycling
- A financial stimulus for companies that recycle their waste
- Rebate programme brought in over 10 year period to give food recycling sector opportunity to develop



In our experience, cost is often cited as a barrier to companies adopting greener practices or adhering to new environmental legislation. As a sector, and as a nation, we should not allow this to stop the development and adoption of food waste to energy as a viable alternative to landfill.

We believe that financial stimulus in the form of rebates should be considered for businesses that can actively demonstrate that they are recycling their food waste. These rebates could be administered in many different forms and would take into account the cost of internal implementation such as amendments to premises for access, as well as the cost of educating staff and changing processes.

Such grants and rebates are available for other aspects of business, even within the wider recycling sector, and play a considerable part in helping companies to change their operations and business. There are a number of ways that we believe that such rebates could work:

**Business Rates:** Given our view that the future of food recycling is at a local level, one of the easiest ways to offer rebates is through business rates paid to local authorities. Rebates could be offered in return for a comprehensive waste audit trail such as detailed waste transfer notes and collection receipts. This approach would also improve compliance and further raise importance of waste audits.

**ROCs:** Given the output derived from food waste, there could be a similar system introduced to the Renewable Obligation Certificate (ROC) which would see companies that recycle food given a ROC for every tonne of food waste diverted from landfill. It could also take the form of carbon credits or CRC offsets. The value of the ROC could then be offset against Corporation Tax or PAYE tax. Again this would be proved by detailed waste audits.

Any rebate scheme put in place needs to be robust and the industry, along with the Government, needs to spend time learning from the success of similar schemes in other industries – drawing on the successes and avoiding the pitfalls. Given the time that it takes to change behaviour, we would envisage these rebates being brought in for a sustained period of time such as 10 years. This will not only help make recycling second nature for business but would also give the sector a sustained period of support to help it develop and gain ground on other materials recycling such as glass and paper.

## **STEPHEN WOODGATE, CHIEF EXECUTIVE AT FABRA:**

“Waste food is a result of society choice in developed countries, and we all have a responsibility to try to minimise waste food going to landfill or to find alternatives. The safe and secure processing of waste food into renewable energy and organic fertiliser is the most significant recent advance in this sector and it should be encouraged by all.”

## **LORD DEBEN, MEMBER OF HOUSE OF LORDS:**

“This manifesto initiates a very important debate in regard to food waste recycling. An opportunity exists to divert a significant amount of food waste away from landfill and to use this substrate to generate useful renewable products. Industry must now work together and explore how to capture increasing quantities of waste from each sector of the food chain, and must continue to develop innovative localised processing solutions.”

## **PETER JONES, DIRECTOR AT ECOLATERAL:**

“By mass, food is around 50% of the UK material consumption economy and it has a commensurate and equivalent impact on our by-product and emissions economy. This occurs across the entire sophisticated food supply chain so the abatement of that impact needs to be suitably refined, targeted and managed in ways which demand coherent, integrated and balanced ranges of policy instruments involving all participants from growers to those who put the plates in the dishwasher.

This manifesto is an important stage in accelerating and informing the debate in this vital area.”







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