

Waste management in Europe: companies, structure and employment

1. Introduction

This paper examines the waste management sector in Europe in 2012.

There have been few changes of ownership since 2007, and the largest multinational companies in the sector remain Veolia and Suez, followed by FCC and Remondis. The companies are getting less business and less profit than they expected because the industrial and commercial waste market has shrunk. They are attempting to restore profits by cutting costs, including in their contracts with municipalities.

Employment in the sector appears to have been volatile since 2008 as a result of the recession , with different results in different countries. About half the jobs are in the recycling and production of new materials, but collection and sorting of household waste, and civic amenity sites, remain the largest areas of stable employment in the sector. In the EU as a whole employment has continued to grow to nearly 1million, of which roughly 200,000 are public sector, 200,000 employed by multinationals, and 600,000 by other local and national private operators.

The public private split in municipal waste collection and processing is roughly equal in the largest countries Germany, UK and France. There is a significant amount of remunicipalisation of services, however, which could grow stronger, especially as there is now yet more evidence that the private sector is no more efficient than the public sector.

While EU legislation continues to drive expansion of waste services, the role of the public sector is undermined by EU institutions giving too much encouragement to PPPs, especially private incinerators. At the same time, the private companies are experiencing a drop in demand from industry, and seeking to compensate by cutting costs across the board, including their municipal services. The waste companies are also attempting to gain new business by importing toxic waste, which has led to strong public resistance.

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