



UNITED KINGDOM



Population: 61,113,205
Capital: London
Language: English
Currency: Pound Sterling
GDP per capita: \$36,600 (2008)

WATER & WASTE WATER

In 2007/2008, the total estimated turnover of the regulated UK water supply and sewerage services market was \$14.32bn. Each day the UK water industry collects, treats and supplies more than 16 billion liters of water to domestic and commercial consumers and collects and treats over 10 billion liters of the resulting wastewaters. The industry comprises 12 water and sewerage service providers and 13 water suppliers, several of which are subsidiaries of international enterprises. The waste and waste water network includes more than 700,000 kilometers (km) of water mains and sewers, of which 640,026km are in England and Wales, and 666 reservoirs. For the UK to continue to provide good water and wastewater service will require significant investment in infrastructure maintenance, particularly with regard to old pipe work and water-treatment facilities in large urban centers. If Government plans for substantial house building materialize, the distribution network will also have to be expanded; the same applies to the London 2012 Olympics. Climate change is the biggest threat to the sustainability of water services. More frequent droughts, more intense rainfall and flooding are influencing investment planning in all aspects of water services. Opportunities exist for the development of products and services that would help conserve water, as well as technological innovation to improve water treatment methods, metering and waste treatment.

Several regulations affecting the water industry are derived from EU directives – notably drinking water, urban wastewater treatment, water framework, groundwater protection, sewage sludge and health and safety at work.

WASTE & RECYCLING

The value of the UK market for waste management is estimated to be \$10.3 billion. Approximately 330 million tons of total waste are produced each year; the most significant sectors contributing to this total are demolition and construction, followed by mining and quarrying. Municipal waste accounts for approximately 9.5% of total waste in the UK. Although the amount of waste being sent to landfill in the UK is decreasing, significant progress is needed to meet the biodegradable targets set by the EU Landfill Directive. Landfill is the worst environmental option for much of the waste produced in the UK, with the methane generated from it being 21 times more potent than CO₂. Hazardous waste management is also becoming increasingly important as the number of sites licensed to receive it has been reduced.

Recycling is set to increase as a result of more stringent legislation and a rise in the costs associated with landfill. At a municipal level, households will be expected to take greater responsibility for separating waste and restricting the amount of waste they generate. An increase is expected in the number of energy-from-waste plants, including incinerators, which are also viewed as benefitting the contribution made to electricity (and, in some cases, heat) production. Households are now recycling around 28% of waste but the UK is behind many of its European neighbors, who recycle well over half of their municipal waste. Most UK households now receive doorstep or curbside collection service from local councils for recyclable materials, including paper, glass, plastics, textiles, wood and textiles. American companies should be aware of legislative developments that may create opportunities in the UK market for firms

meeting the requisite operational skills. These would include curbside recycling, waste separation, end-of-life vehicle dismantling, electrical and electronic goods disposal, and alternatives to landfill disposal.

REMEDICATION & BROWNFIELDS

An estimated 98,000 hectares of UK brownfield land is still vacant, derelict or available for redevelopment. The Government's target that 60 per cent of new developments be built on previously developed land has been met eight years ahead of schedule. The proportion of development on brownfield land varies widely from region to region. In London it is 90 per cent, while in the South West and East Midlands it is less than 40 per cent. It is expected that the amount of land at risk of flooding will increase substantially by 2050 due to climate change. This means that some of the engineering solutions used to remediate contamination, such as encapsulation of contaminated soil left in situ, permeable reactive barriers, or bentonite walls, may not be appropriate if the site is to be subject to inundation by flood waters. A prime example of soil remediation is the former industrial park that is the construction site of the London 2012 Olympic Park.

ENVIRONMENTAL SERVICES

Consulting services that are in particular demand include services for contaminated land remediation and in the water/wastewater segments.

INDOOR & OUTDOOR AIR POLLUTION

Building Regulations concerning ventilation (ADF) have set performance criteria for several air pollutants including VOCs, nitrogen dioxide and carbon monoxide. Workplace air quality, such as in schools and prisons, is regulated by the Health and Safety Executive. In the majority of homes there is no need for concern over existing levels of pollutants because of housing and public health legislation. However, one particular source of pollutants at many UK sites is soil gas entering buildings from the ground. With regard to household cleaning, the use of green detergents, cleaner paints and building materials are becoming popular to minimize the unnecessary use of chemicals.

Stringent EU legislation and an increased level of environmental awareness have created demand for air pollution control equipment. The EU Large Combustion Plant Directive (LCPD) aims to reduce acidification, ground level ozone and particulates by controlling the emissions of sulphur dioxide, oxides of nitrogen and dust from large combustion plants. In the UK large power stations, petroleum refineries, steelworks and other industrial processes running on solid, liquid or gaseous fuel must comply with the LCPD, or face closure. Technologies such as fabric filters, flue cleaning equipment, electrostatic precipitators, flue gas desulphurisation and selective catalytic reduction (SCR) are all likely to help reduce these emissions significantly.

TRADE EVENTS

Sustainability Live, May 19-21, 2009 <http://www.sustainabilitylive.com>

Recycling and Waste Management, September 16-18, 2009 <http://www.rwminfo.com>

AVAILABLE MARKET RESEARCH

Green Building and Ecobuild (2009)

Municipal Waste Management (2006)

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