

National Waste Reporting 2013

OVERVIEW – THE WASTE MANAGEMENT INDUSTRY IN AUSTRALIA

About the industry

The policy framework supporting the provision and delivery of waste management in each jurisdiction is the responsibility of state, territory and local governments. While government is responsible for the delivery of waste management policy, regulations and, in some cases, waste services, the composition of the waste management industry is a mix of both public and private operations. This mix of public and private is present in all aspects of waste management, from collection through to disposal.

State and territory government regulations, licensing requirements and policies often set the parameters for what waste services are to be provided, where they will be provided and, through environmental standards and occupational health and safety requirements, how waste services will be provided. Local government's roles and responsibilities in respect to waste management are determined by jurisdictional policies and frameworks.

In 2009-10, there were 2667 businesses and organisations involved in the provision of waste management services (Table 1). This comprises of 2120 businesses from the public and private trading sector and 547 businesses from the general government sector (Australian Bureau of Statistics, *Waste Management Services, Australia* publication catalogue 8698).

Table 1 Waste management and recycling businesses, by sector 2009-10

Sector	Jurisdiction							Total
	ACT/NT/TAS	NSW	QLD	SA	VIC	WA		
Trading (Public/Private)	72	709	409	182	592	208	2120*	
General Government	46	153	59	68	80	141	547	
Total	118	862	468	250	672	349		

*Due to businesses operating in multiple jurisdictions, the trading sector as a total does not equal the sum of the jurisdictions. Source: 2009-10 Waste Management Services, ABS 2011 catalogue 8698

Waste management and recycling businesses often provide services across multiple waste activities. The collection of waste is one example, with many businesses that collect waste also managing operations around the collection of recyclables and, in some cases, green waste.

Of the 2120 waste management businesses operating in the private and public trading sector, 1226 businesses include waste collection under their activities, with 819 businesses undertaking recyclables collection (Table 2) (Australian Bureau of Statistics, *Waste Management Services, Australia* publication catalogue 8698).

Table 2 Waste management businesses: Collection and transport activities, 2009-10

Number of businesses by sector and type of activity				
Sector		Collection and transport of waste	Collection and transport of recyclables	Collection and transport of green waste
	Trading (public/private)	1226	819	470
	General Government	222	102	107

Source: 2009-10 Waste Management Services, ABS 2011 catalogue 8698

Decisions relating to waste management operations and processing services are made by local governments. Local governments will often contract collection and processing services to the private sector, but, in some cases, councils will elect to retain these responsibilities. However, in most cases, the public sector depends on private operations to supply new innovative technologies and specialist skills for material separation as demonstrated by ownership of alternative waste treatment facilities which are currently wholly operated by the trading sector (Table 3).

The trading and private sector operators have proven to be crucial in the advancement of waste management operations. Many private waste management businesses are now considered specialists in their field, either in one particular waste stream, in the recovery of specific materials or in the treatment of one type of waste/product. Outside of collection and transportation services, the trading sector accounts for approximately two thirds of the businesses involved in material/resource recovery or reprocessing activities (Table 3).

Table 3 Waste management businesses: Operations and processing activities, 2009-10

Number of businesses by sector and type of waste							
Sector		Landfill operations	Transfer station / Waste depot operations	Material / Resource recovery or reprocessing	Green waste recycling	Alternative waste treatment	Liquid waste treatment*
	Trading (public / private)	54	193	314	72	54	42
	General Government	295	301	110	164	N/A	37

Source: 2009-10 Waste Management Services, ABS 2011 catalogue 8698

* excludes sewage treatment plants

Value of the industry

The true value of the waste management industry is difficult to measure in the absence of an exhaustive and consistent data set. The Australian Bureau of Statistics (ABS) has two collections, the [Waste Account Experimental Estimates](#) (catalogue number 4602) and the [Waste Management Services Australia](#) (catalogue number 8698), which both aim to provide information from a sectoral and jurisdiction perspective on income, expenditure and employment in the waste management services industry.

Sources of waste management income are classified into income from the provision of waste services, the sale of recoverable material, and other sources of income and income from energy generated from waste¹.

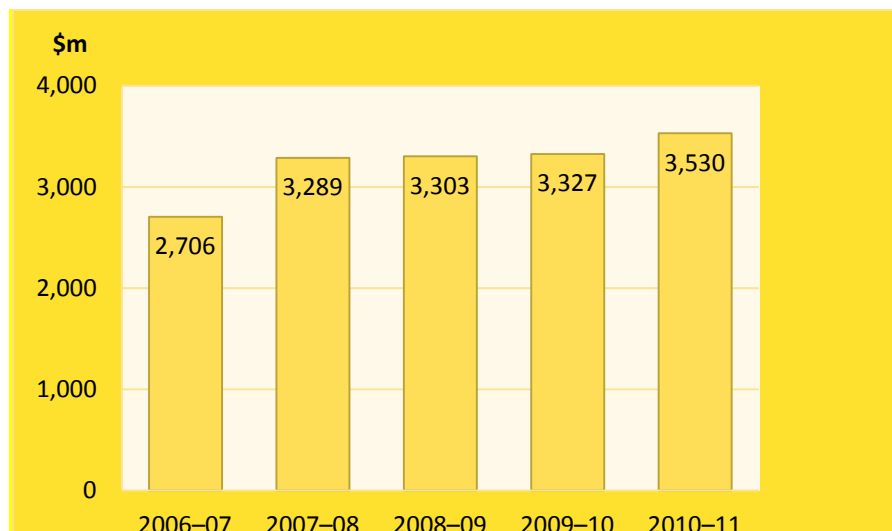
In 2009-10, private and public trading sector waste management businesses received \$8.6 billion in income. The provision of waste services accounts for \$5.1 billion of income, which includes \$4.3 billion in revenue from the provision of non-recyclable waste services and making up half of the sector's total income. The sale of recyclable material contributed another \$2.2 billion, approximately 26 per cent, to total income in the sector.

The general government sector received \$2.6 billion in income during 2009-10. However, the main source of income for this sector comes from other sources of income and income from energy generated from waste which totalled \$2.1 billion, or 79 per cent.

In 2009-10, households spent \$1.6 billion on waste management services, both recyclable and non-recyclable. This is mainly attributable to municipal rates related to waste management services and constitutes around 17 per cent of total expenditure in the sector.

Waste management businesses contributed \$3.3 billion and \$3.5 billion to Australia's gross domestic product (GDP) in 2009-10 and 2010-11, respectively, according to the Australian Bureau of Statistics (ABS). This is based on Industry Value Added (IVA), which over the last 4 years has increased by 30 per cent for the waste management services industry, up from \$2.7 billion in 2006-07 (Figure 1).

Figure 1 Industry Value Added, Waste Management Services Industry, Australia (excludes general government)



Source: ABS, Australian Industry, 2010-11 (Cat. no. 8155.0)

Skills and employment

The waste management industry directly employs 32 737 people across the jurisdictions according to the ABS. These are individuals who work for businesses where the primary function of the business falls within the definition of the ABS industry classification for waste management businesses.

¹ Australian Bureau of Statistics, Waste Management Services, Australia Publication Catalogue 8698

Table 4 Waste management and recycling employment, by sector and jurisdiction 2009-10

Sector	Jurisdiction							
		ACT/NT/Tas	NSW	Qld	SA	Vic	WA	Total
Trading (public/private)		836	8730	5114	1917	6945	3269	26812
General Government		240	2311	1036	339	903	1096	5925
Total								

Source: 2009-10 Waste Management Services, ABS 2011 catalogue 8698

More information on the composition of the waste management and resource recovery industry, can be found in the following Australian Bureau of Statistics publications:

- [Waste Management Services, Australia](#)
- [Waste Account, Australia, Experimental Estimates 2013](#)