



# National waste crime survey: 2025 results and findings

Chief Scientist's Group report

July 2025

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Email: [research@environment-agency.gov.uk](mailto:research@environment-agency.gov.uk)

Author(s):

Nicole Parr, Matthew Hess

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Research contractor:

SYSTRA Limited, 3<sup>rd</sup> Floor, 5 Old Bailey, London, EC4M 7BA

Environment Agency's Project Manager:  
Matthew Hess

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Dr Robert Bradburne  
**Chief Scientist**

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# Foreword

Waste criminals put us all at risk every time they break the law. Their toxic crimes cause widespread and significant harm to people, places and the economy.

The more we know about these people, the more effective we can be at stopping them. This is why we run the National Waste Crime Survey - it is designed to provide us with a unique insight into the problem by asking those who see it day in, day out. The results in this report inform our understanding of the scale and nature of crimes in the waste industry, the impact on people, and what works to stop and shut down waste criminals. It also tells us there is a lot more to do if we're going to stop them.

The headlines illustrate the size of the challenge:

- Waste criminals are all around us: respondents estimate that 20% of all waste produced may be illegally managed – enough to fill Wembley stadium 35 times.
- Waste crime is big business: the legitimate waste industry estimates it costs £1bn a year (ESA 2021). Survey respondents estimated that 20% of all waste operators are thought to engage in illegal activity.
- Rogue operators are financially motivated: they misdescribe waste to avoid regulations and evade landfill tax to illegally boost their profits. Respondents estimated that financial gains are attracting organised crime, estimating that 35% of waste crime is committed by organised crime groups.
- Waste crime is bad for good business: legitimate waste operators are undercut by criminals offering below market rate services, and landowners and farmers whose land is dumped on face significant clean-up costs.
- Under reporting: only 27% of all waste crimes are reported. We can't stop what we don't know about, however, we need to build trust that each report made is valuable, is reviewed, assessed, and used to help us to target the offenders.
- We need to work together to drive criminals out of the industry: the Environment Agency is respected for its knowledge, but industry remain sceptical that the Environment Agency is resourced to do the job.

In a year that's sadly seen frequent headlines about waste crime (from major dumping and producer responsibility fraud), these survey findings further illustrate the scale of the challenge ahead. Waste crime continues to impact the legitimate waste industry, restricting growth in this sector and undermining investments in achieving a circular economy. Stopping and shutting down high risk illegal waste sites, tackling the misdescription of waste and producer responsibility fraud, and preventing the illegal export of waste are the Environment Agency's crime priorities. Progress since the 2023 survey includes the launch of our Economic Crime Unit. This has been an important step in responding to the changing nature of waste crime. It targets the money and assets behind offending and uses financial mechanisms to stop criminals, including organised crime groups from operating.

The Environment Agency is determined to use all our powers and resources to improve compliance with the law - stopping waste crime, protecting the environment, and pursuing criminals. We cannot achieve these goals alone. We know we are stronger working together, with our partners, across government, with other regulators and law enforcement agencies to share information, tools, and resources. The waste industry and the public have a crucial role in helping us stop waste criminals faster by sharing with us what they know about the people committing waste crimes.

Finally, I'd like to thank everyone who took part and to the waste industry who helped shape and promote the survey. The overall response was excellent and will inform what we do.

*Steve Molyneux*

# Acknowledgements

We are grateful to the participation of several teams within the Environment Agency and Defra for contribution to the design of the National Waste Crime Survey, particularly waste regulation colleagues and waste communication engagement specialists. Several colleagues also assisted in the distribution of the survey. Similarly, we are grateful to contributors from Chartered Institution of Wastes Management, Environmental Services Association, United Resource Operators Consortium, National Farmers Union, and Local Government Association for helping to shape the questions and promoting the survey to their member bases. SYSTRA administered the survey. Finally, thanks to the respondents of the survey for helping to build our understanding of the scale and nature of waste crime in England, and how the Environment Agency can be more effective in tackling it.

# Executive summary

Waste crimes are committed when people don't deal with waste in accordance with the law, for example by illegally exporting waste or large-scale dumping. Waste criminals are able to make huge profits by breaking the law to undercut the legitimate industry or not paying the appropriate tax on waste. Whilst the Environment Agency works to stop waste criminals from impacting our environment and communities, it can be challenging to measure how successful this work is.

The National Waste Crime Survey is used as a tool for the Environment Agency to greater understand the nature and scale of waste crime, as perceived by those experiencing it. It is the most independent metric the Environment Agency uses to measure waste crime, because it's not restricted by Environment Agency operational resources or pressures. In addition to the scale of waste crime, the survey also asks what motivates and deters waste criminals and explores respondents' opinions on the effectiveness of the Environment Agency in tackling waste crime.

This is the fourth iteration of the survey, following a pilot survey in 2020 and two full previous iterations in 2021 and 2023. In 2025, waste industry respondents estimated that 20% of waste is illegally managed, with 1 in 5 waste industry organisations estimated to be committing waste crime. Findings were largely consistent with previous rounds of the survey (18% of waste was estimated to be illegally managed in 2023), and whilst there is some fluctuation in the proportion of respondents affected by waste crime, there were no changes outside the margin of errors for each survey.

This means that waste crime continues to impact the legitimate industry and cause harm to landowners and farmers. It was estimated that 50% of the waste industry is affected by waste crime, causing financial costs in excess of an estimated £60 million across all survey respondents in the last 12 months. This demonstrates the impact that waste crime has for legitimate business restricting the development and growth of the waste industry. Waste crime is a threat to the circular economy, restricting sustainable growth of a sector that is crucial to achieving circularity, as well as directly removing waste from the legitimate cycle. Effective regulation that protects people and the environment is essential to move towards sustainable growth and a circular economy. Encouragingly, in 2025 the estimated proportion of waste crime reported to the Environment Agency rose to 27%, with a large increase in the satisfaction reporters of waste crime had with Environment Agency action taken.

Looking across the results of the previous iterations of the National Waste Crime Survey allows emerging trends to be observed. The proportion of respondents who felt there had been an increase in waste crime over the previous 12 months fell with each survey up to 2025. However, for fly tipping, this changed in 2025, where a higher proportion of respondents felt that it had increased. This was true for both small scale fly tipping (waste abandonment of less than one lorry load of waste, not within the Environment Agency's remit) and large scale fly tipping. This is supported by the findings of the Chief Regulator's Report (Environment Agency, 2023-2024), which found that whilst there had been a



downward trend in large scale fly tipping incidents that the Environment Agency dealt with since the financial year 2019 to 2020, an increase occurred in 2023-24.

Since 2020, the National Waste Crime Surveys have provided insight into the scale and nature of waste crime in England, highlighting the damage that waste crime causes. It is clear that there is work still to be done. The findings will be used to inform the Environment Agency's strategic approach to eliminate waste crime by 2042.

# Introduction

Waste crime in England is widespread, and criminals can profit by illegally handling waste, which is estimated to cost the English economy £1 billion per year (ESA 2021). Waste crime includes dumping or burning waste, illegally shipping waste abroad, deliberately mis-describing waste (either to evade landfill tax or avoid the correct management required) and operating illegal waste sites. Illegal management of waste damages the environment and causes harm to local communities. This is in addition to the impact to the waste industry, as illegal practises undercut legitimate businesses.

The scale of waste crime in England is challenging to measure directly and quantify accurately as criminals aim to avoid detection of their activities. The Environment Agency therefore uses a National Waste Crime Survey to gather insights from the waste industry, landowners and farmers, and service providers. This provides information on the nature and the scale of waste crime, as well as how the Environment Agency is perceived in tackling it.

The previous iterations of the survey (2021 and 2023) have found that waste crime is perceived to be widespread (18% of all waste was estimated to be illegally managed in both 2021 and 2023, when averaging across waste industry respondent's estimates). Respondents have consistently felt that waste crime has increased over the preceding 12 months. The survey has also helped the Environment Agency to shape its strategic direction and consider how its effectiveness is regarded by the waste industry and potential victims of waste crime.

In February 2025 the fourth iteration of the survey was launched, further solidifying the National Waste Crime Survey as a useful tool to track changes in the perception of waste crime.

## Objectives

For this iteration, the survey was designed to build on the knowledge base established in 2021 and 2023, providing an update on the scale and nature of waste crime.

Specifically, the objectives were to:

1. Quantify the perceived scale and impact of waste crime type in England
2. Understand what motivates people to commit waste crime in England, what enables it and what has the potential to deter waste crime.
3. Understand the willingness of the public and industry to report waste crime.
4. Identify whether action taken by the Environment Agency and our partners is perceived as being effective in reducing the scale of waste crime in England.

# Methodology

The National Waste Crime Survey 2025 was commissioned by the Deputy Director for Waste and Resources Regulation at the Environment Agency. The research was carried out by SYSTRA consultants. It ran as an online survey from 3<sup>rd</sup> February 2025 – 25<sup>th</sup> February 2025.

Respondents to the survey were characterised as representing one of three target groups:

- Waste industry
- Landowners/farmers
- Service providers (including local authorities and environmental consultants)

Potential respondents (table 1) received weekly email reminders, which invited them to complete the survey. This email explained the objectives of the survey and that responses to the survey would be treated with anonymity. To maximise the survey response rate, stakeholders representing the target response groups were consulted during the survey design phase and then assisted in sharing the survey to their membership bases. This included United Resource Operators Consortium, Environmental Services Association, Chartered Institution of Wastes Management, National Farmers Union, and Local Government Association. Finally, the Environment Agency promoted the survey through its social media channels, alongside information on how to report waste crime through Crimestoppers.

**Table 1 The total number of emails sent to specific target groups with an invitation to complete the national waste crime survey.**

Target Group	Number contacted
Sample list of those in the waste industry, purchased from Experian	9028
Sample of Environment Agency waste permit holders	5266
Sample of Defra register of landowners/farmers	6611
Sample of Environment Agency exemption holders	635
Sample of Environment Agency registered Carriers, Brokers and Dealers	2201

## Wisdom of the crowds

Several questions in the survey used a 'wisdom of the crowds' approach. This method aims to utilise the collective knowledge of a group to produce average estimates, by aggregating individuals' answers (Centola 2022). The approach assumes the sample respondents have a diverse range of opinions, specialised local knowledge and can state independent views. Broadly, the groups targeted in this survey meet these requirements, with perspectives across the waste industry (including organisations ranging in size and sector), landowners/farmers, and service providers as well as geographical spread.

However, this survey relied upon a self-selecting sample, which is an acknowledged limitation of this research. Those who have experienced waste crime or those who hold strong opinions on the Environment Agency may have felt more motivated to reply than those who have not experienced waste crime, or those who commit waste crime themselves. A level of bias that cannot be controlled for is assumed to be present in responses. Furthermore, it is possible views from respondents were not truly independent or diverse as respondents' opinions may be informed by their consumption of materials by trade press or industry associations. The Environment Agency also circulate waste crime statistics and reports, which could have informed respondents' opinions prior to completing the survey. For example, respondents may have been aware of the finding that 18% of waste was estimated to be illegally managed in 2023. However, all responses reflect the perceptions of those working in the waste industry or those who may be victims of waste crime. This survey produces a subjective measure of the scale of waste crime and should be treated as an informed estimate rather than the true scale of waste crime.

## Modifications to 2023 survey

The 2025 survey aimed to track changes in the perception of the scale and nature of waste crime and modifications to the questions set have been very minimal. In 2023, the survey included small scale fly tipping as an additional waste crime type for the first time and given the effect this was perceived to have on the results, small scale fly tipping has been included again, despite being outside of the Environment Agency's remit. This was defined separately from large scale fly tipping throughout the survey:

- Large scale fly tipping - waste abandonment, including illegal deposits of waste of more than one lorry load of waste
- Small scale fly tipping - waste abandonment of less than one lorry load of waste

In 2025, the survey was also sent directly to a sample of registered carrier, broker and dealers, a new target group (table 1). This was to increase representation of the waste industry. Changes have been made to ensure questions are up to date, removing questions about the impact of COVID-19 and EU Exit, and adding questions about new measures implemented by the Environment Agency.

Unlike previous years, in 2025 there were no additional interviews to expand upon the survey findings.

# Results

## Sample profile

The survey garnered responses from 764 people (21 respondents were excluded based on the inclusion criteria of needing to have a role in relation to waste or landowner/farmer). There was a response rate of 3.3% (for those who were emailed the survey directly rather than who accessed the survey through social media, table 1). At this sample size (764), the margin of error is  $\pm 3.5\%$ , at a 95% confidence level. In 2021 and 2023 the margin of error was  $\pm 3.4\%$  (Environment Agency, 2021; 2023). Only differences between survey years with no overlapping confidence intervals would be considered statistically significant.

Of the 764 respondents, 351 worked within the waste industry (table 2). Those with a role in waste management covered a range of sectors (most commonly construction and demolition, recycled materials, or household/commercial waste). There were 406 responses from landowners/farmers and 95 from service providers (including local authorities and consultants).

**Table 2: The total number of respondents and the groups they belong to (either waste industry, landowners/farmer, and service providers) along with the percentage of total occupancy or overlap between groups, for example 351 respondents were from the waste industry, 15% of which were also landowners/farmers.**

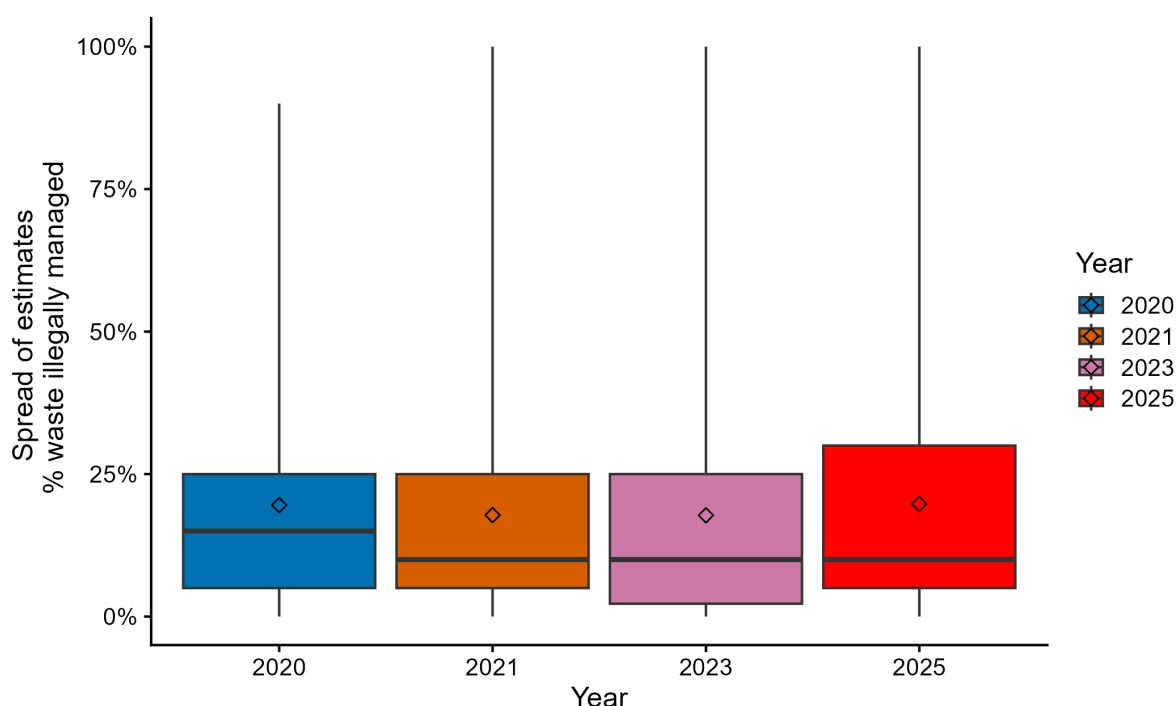
Group	Waste industry	Landowners/farmers	Service providers
Waste industry	100%	13%	29%
Landowners/farmers	15%	100%	19%
Service providers	8%	4%	100%
Total number	351	406	95

The geographical spread of respondents included representation from each of the Environment Agency areas. There was a range of organisational sizes, though most respondents represented smaller organisations (76% of respondents worked for organisations with fewer than 50 employees).

# Objective 1: Quantify the perceived scale and impact of waste crime in England

## Scale of waste crime

**Waste crime is widespread – respondents from the waste industry estimated that 20% of all waste is illegally managed** (mean value, 18 to 22%, at 95% confidence level, n=351). Based on the amount of waste produced in England in 2022 (Defra, 2024), that's approximately 38.2 million tonnes illegally handled, enough to fill Wembley stadium 35 times. This finding suggests a small increase in illegal handling of waste (in 2023 it was estimated 18% of waste was illegally handled, 16% to 20% 95% CI, n=346, (Environment Agency, 2023) figure 1). Given the overlapping confidence intervals, it is not a statistically significant increase. There was a wide spread of estimates, including a small number of respondents who estimated that over 90% of waste is illegally managed. This increases the mean estimate, as shown in Figure 1. However, the median estimate of the proportion of waste that has been illegally managed is 10% (consistent with the 2021 and 2023 surveys).



**Figure 1** Boxplot to show the distribution of estimates for the survey question “*please can you provide your best estimate for the percentage of waste you believe is illegally managed in the sector you work within?*”. This was only asked to waste industry respondents; pilot study (n=182), 2021 (n=379), 2023 (n=346) and 2025 (n=351). The extent of the whiskers showing the minimum and maximum estimate, the upper and lower bounds of the box show the 75% and 25% quantiles and the line through each box shows the median value. An additional diamond point is added to each box to show the mean estimate of percentage of waste that has been illegally managed.

Respondents were asked to estimate what percentage of other organisations nationally and within their Environment Agency area (distinctions were shown to respondents on a map) were affected in any way by waste crime (therefore estimates will include those affected by small scale fly tipping). Nationally, 49% of the waste industry was estimated to be affected by waste crime (n=351), 57% of landowners and farmers (n=406) and 62% of service providers (n=56). There was geographical variation in the estimated scale of waste crime in addition to variation between respondent groups (land owners/farmers, waste industry and service providers). The proportion of land owners and farmers estimated to be affected was higher than the proportion of the waste industry estimated to be affected in most areas (Cumbria and Lancashire was the exception, with 56% of the waste industry estimated to be affected (n=12), compared to 44% of land owners and farmers (n=13)). The waste industry estimate was highest in Lincolnshire and Northamptonshire (an estimated 59%, n=12) compared to Solent and South Downs, which had the lowest estimated scale (32%, n=23). However, the highest estimate for the proportion of landowners/farmers affected by waste crime was in Hertfordshire and North London (82%, n=7) and lowest in Cumbria and Lancashire (44%, n=13). The lower number of respondents from some areas, such as Hertfordshire and North London, limits the ability to compare across areas and estimates of crime specific to areas should be interpreted with caution.

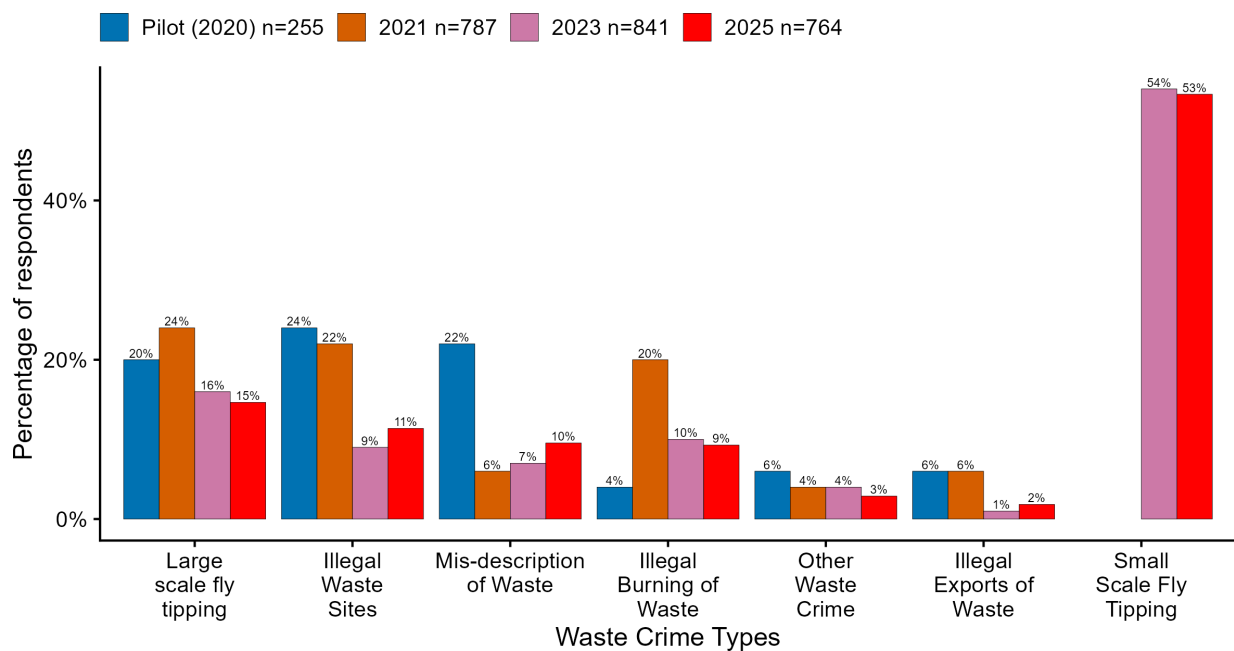
Respondents were then asked about their own experiences of specific waste crime types and the impact this has had on their organisation, land, or clients. Table 3 shows that small scale fly tipping has affected the greatest proportion of survey respondents compared to other waste crime types, regardless of the group. However, a higher percentage of respondents who were landowners/farmers or service providers were impacted by small scale fly tipping than in other groups (87% of landowners/farmers and 97% of service providers have been impacted by small scale fly tipping compared with 50% for the waste industry). Across all groups, fewest respondents reported being impacted by illegal waste exports.

**Table 3 The percentage of respondents who reported being affected by each waste crime type (combining respondents who selected both ‘directly’ and ‘indirectly’), split into the three respondent groups: waste industry, landowners/farmers, and service providers.**

<b>Waste Crime Type</b>	<b>Waste Industry respondents affected (%)</b>	<b>Farmer &amp; landowner respondents affected (%)</b>	<b>Service provider &amp; local authority respondents affected (%)</b>
<b>Large scale fly tipping</b>	32%	21%	78%
<b>Small scale fly tipping</b>	50%	87%	97%
<b>Illegal waste sites</b>	44%	13%	65%
<b>Illegal burning of waste</b>	26%	17%	64%
<b>Illegal exports of waste</b>	10%	1%	16%
<b>Mis-description of waste</b>	31%	7%	42%

**The proportion of respondents who experienced direct impacts of waste crime types were found to be similar to the 2023 survey (figure 2).** It is likely that the drop in the proportion of respondents directly impacted by large scale fly tipping and illegal waste sites between 2021 and 2023 reflects the addition of small scale fly tipping to the question, which has been found to increase between 2022/23 and 2023/24 (DEFRA, 2025).





**Figure 2 Bar chart to show the percentage of respondents who were directly affected by waste crime in the pilot study, 2021, 2023 and 2025, with error bars to show 95% confidence intervals. Question: “Have [you, or your organisation / the land you own or manage / your clients] been affected in any way by waste crime in the past 12 months, either directly or indirectly?”**

## Scale of mis-description

Respondents who had reported experiencing mis-description of waste were asked to estimate the number of individual incidents in the last 12 months. Respondents in 2025 estimated an average of 131 individual incidents, in line with the increase seen between 2021 (55 individual incidents) and 2023 (127 individual incidents). Likewise, 42% of respondents thought that mis-description was a daily occurrence in 2025. Waste industry respondents believed that **23% (n=154) of waste is misdescribed, with 1 in 4 competitors estimated to mis-describe waste. It was estimated that organisations who mis-describe waste evaded 36% of their landfill tax bill (n=115)** in the last 12 months. This finding was consistent with the previous surveys.

## Duty of Care

When asked ‘to what extent do you understand waste duty of care requirements’, 95% of respondents working in waste treatment and/or disposal stated they ‘fully’ understand the requirements. Confidence in understanding of duty of care requirements was lowest in the land ownership and farming group with only 39% responding they ‘fully’ understood the requirements and 11% selecting “I partially understand the waste duty of care

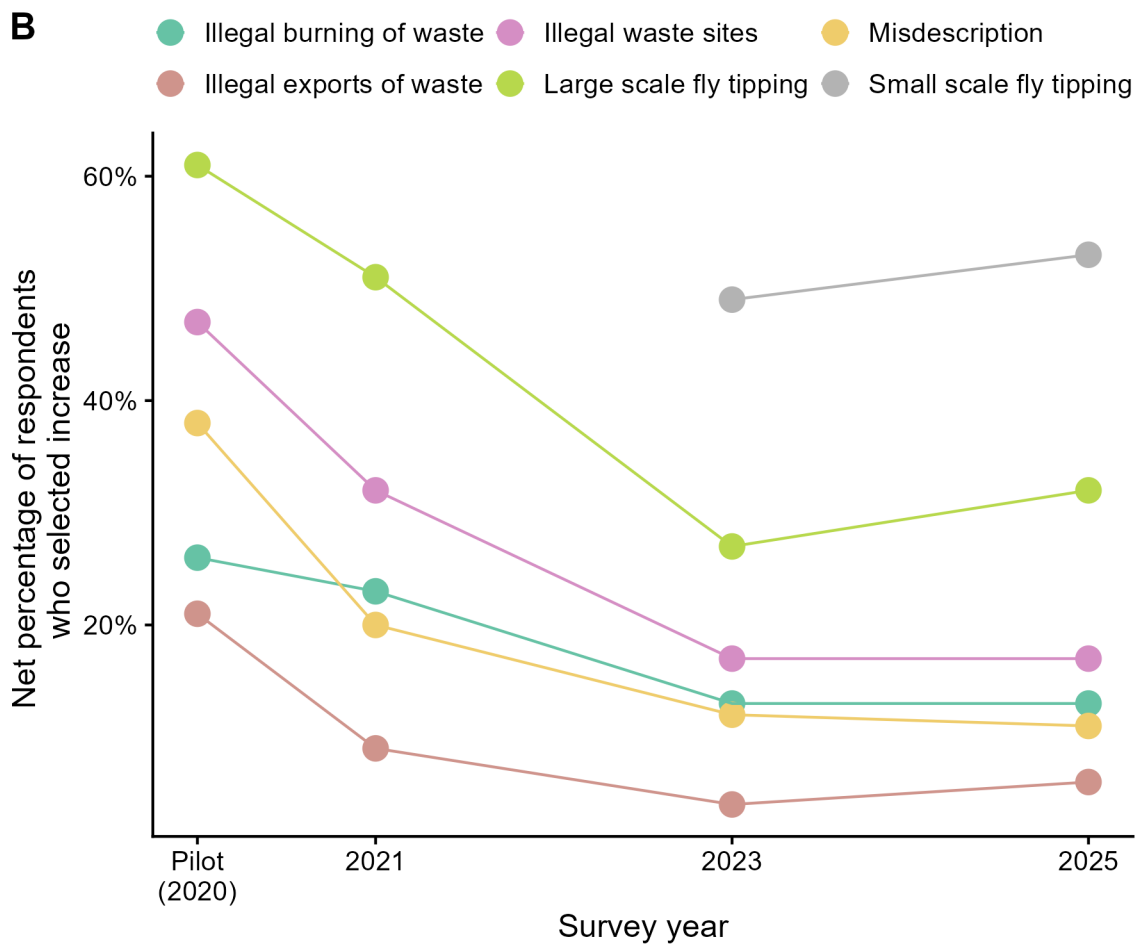
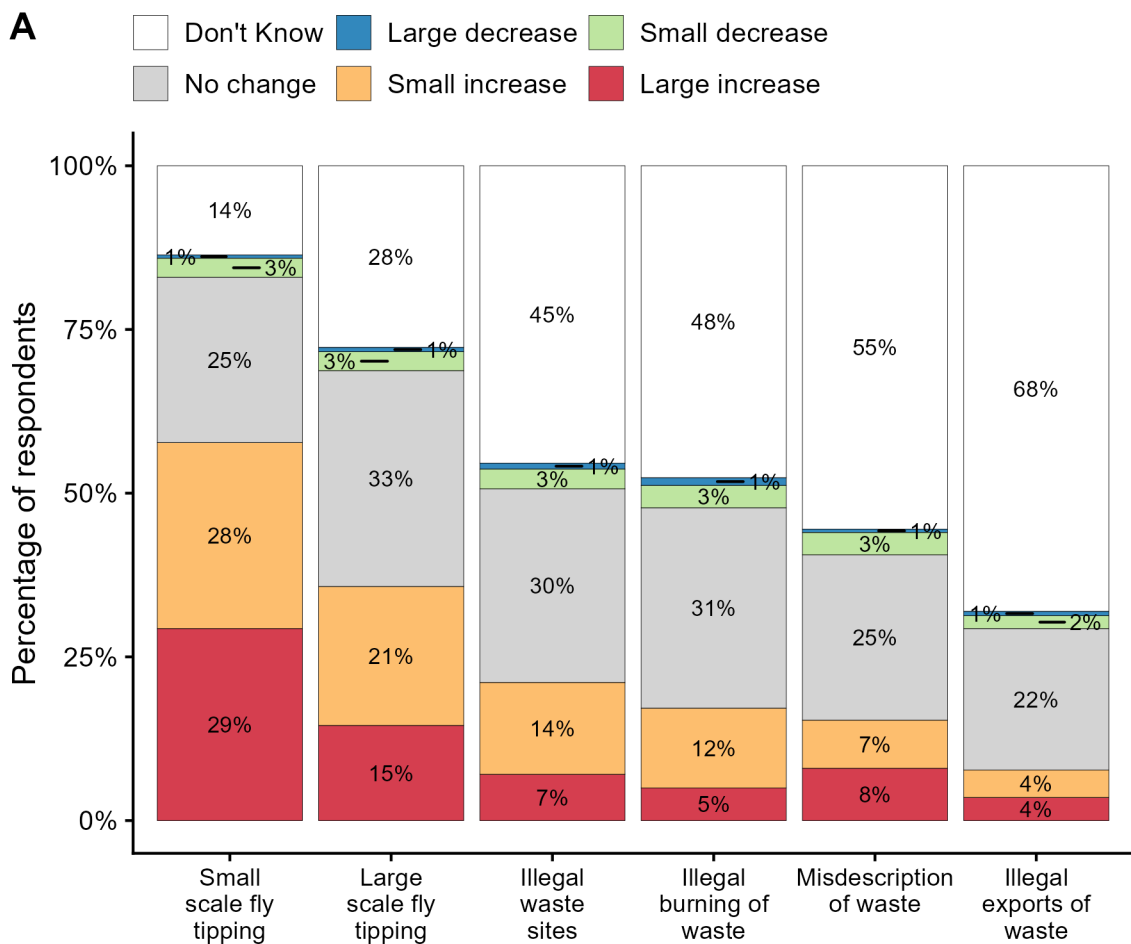
requirements". Of those who understood duty of care requirements, 52% reported turning away waste that they suspected violated duty of care.

## **Producer responsibility regulations**

The Environment Agency also seeks to tackle producer responsibility fraud as part of its waste crime remit. Respondents in the waste industry were asked how accurate they felt nationally reported recycling rates are for batteries (respondents were informed that this was 46% in 2023) and packaging (65% in 2023). For batteries 9% of the respondents felt these proportions were 'accurate, or almost accurate', and 11% of respondents considered packaging recycling rates were 'accurate, or almost accurate'. The majority (35% for batteries and 32% for packaging) of respondents selecting 'somewhat accurate'. Respondents who felt the recycling rates were not accurate were asked what they estimated the actual rate to be. For batteries the average estimate was 31% (15 percentage points lower than the reported statistic) and for packaging this was estimated to be 38% (27 percentage points lower than the reported statistic). Similarly, when asked about their perception of accuracy in waste electrical and electronic equipment data and evidence notes, only 13% of respondents from the waste industry considered these to be accurate or 'almost accurate' and 24% of respondents felt these were 'somewhat accurate'. However, 52% of waste industry respondents selected 'Don't know' for this question.

## **Perceptions of the changing scale of waste crime**

Respondents were asked if they felt specific waste crimes had increased (or decreased) over the last 12 months. This revealed the common perceptions are that waste crime has increased (small scale fly tipping) or remained the same as previous years (figure 3A). Very few respondents felt that any waste crime type had decreased in scale over the last 12 months. However, this finding should be treated with caution given the high percentage of respondents who selected "don't know", particularly for changes in illegal waste exports or mis-description of waste. When compared with 2023 (figure 3B) the perception of change for each crime type was similar, with slightly more respondents considering there to have been an increase in large scale fly tipping in 2025 (net 32%) compared to 2023 (net 27%). This was not reflected in the proportion of respondents affected by large scale fly tipping in 2025 compared to 2023 (figure 2).

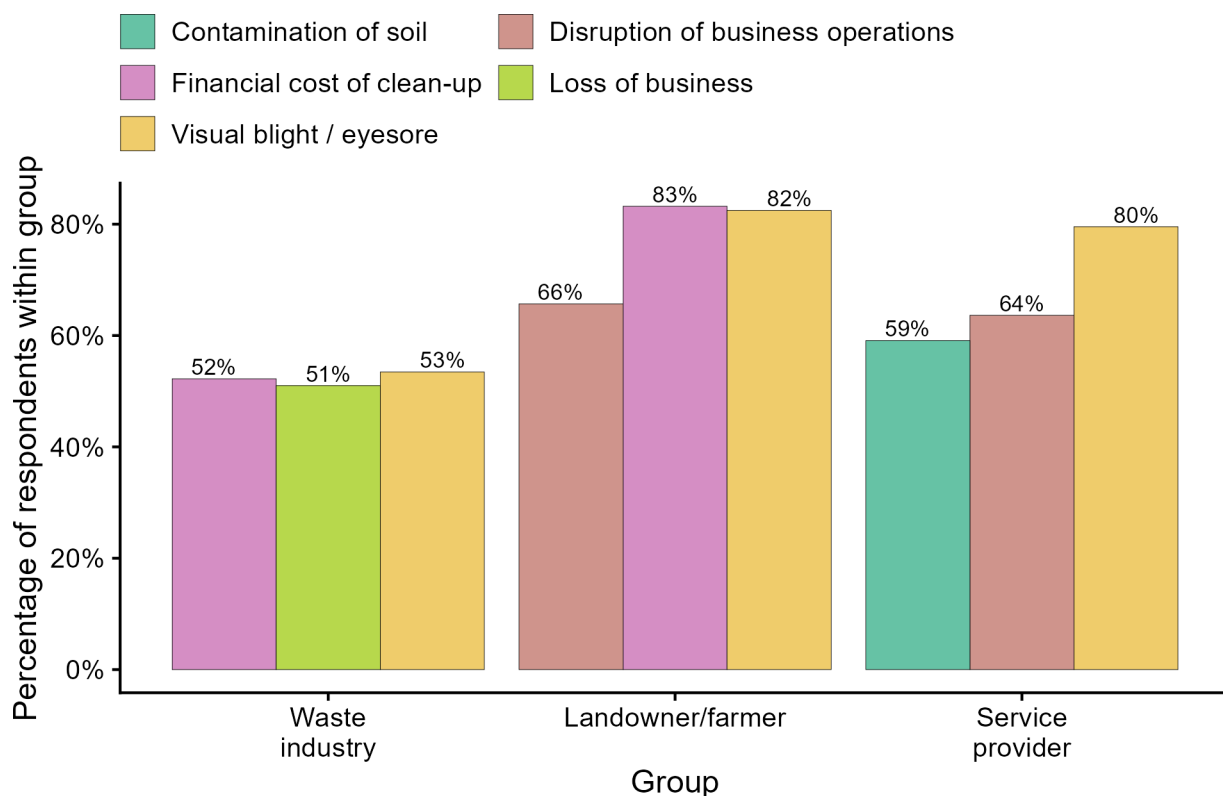


**Figure 3 (A) Stacked bar chart to show the percentage of respondents who perceived there to be a change in the prevalence of waste crime in the last 12 months, from a large increase through to a large decrease. All percentages are rounded and may not total to 100% within each bar. Question: “*Which best describes the change in number of waste crimes committed in England over the last 12 months?*” (N= 764).**

**(B) Net percentage of respondents who selected increase by waste crime type (y axis) was calculated by the percentage of respondents who selected ‘small increase’ or ‘large increase’ minus the percentage that selected ‘small decrease’ or ‘large decrease’, for each year.**

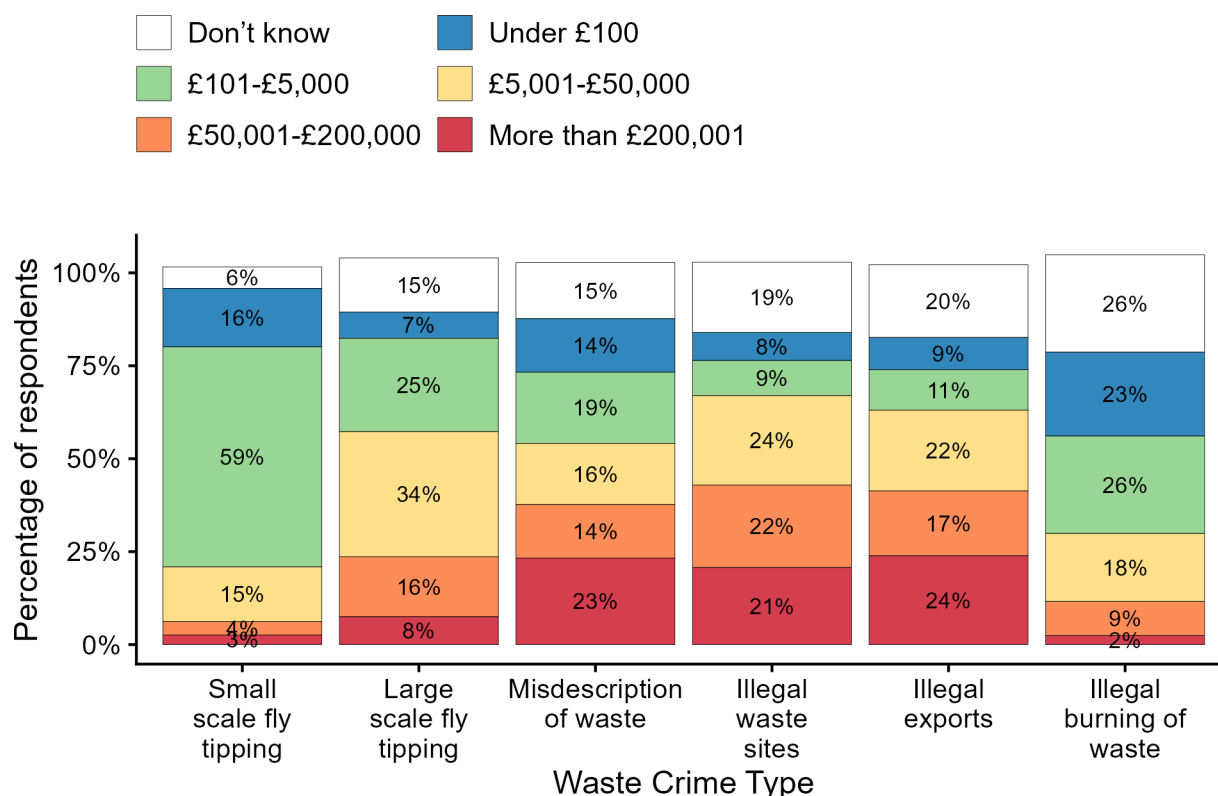
## Impact of waste crime

Whilst the survey cannot address the long term environmental or amenity impacts, respondents were asked about their experiences over the last 12 months to better understand the immediate impacts of waste crime. Of respondents who had been impacted by waste crime, **the visual blight and the financial costs (of clean-up and otherwise) affected the highest percentage of respondents**, though impacts varied between groups (figure 4).



**Figure 4 Bar chart to display the top three most selected impacts of waste crime by respondent group. Question: “*In what way have waste crime incidents impacted [your organisation / the land you own or manage / your clients], the wider community, and the environment in the past 12 months?*”, N= 247 (waste industry), 137 (landowners/farmers), 88 (service providers), asked only to those impacted by waste crime.**

In addition to these common impacts, 31% reported waste crime having a negative impact on mental health (up from 13% in the 2023 survey). Respondents also used free text boxes to report other impacts that included loss of reputation to their sector.



**Figure 5 A stacked bar chart to show the percentage of respondents who incurred financial costs (ranging from under £100 to over £200,000) due to experiencing waste crime, over the last 12 months. All percentages are rounded and may not total to 100% within each bar. Question: “What is the total financial cost (including loss of business) of [waste crime type] [to your organisation / on the land you own or manage / to individual clients] in the past 12 months?” (Asked to those who had been affected by each waste crime)**

To understand the financial impact that waste crime has, respondents were asked to estimate their total financial costs resulting from waste crime they had experienced during the previous 12 months (figure 5). Given the number of respondents per waste crime type and cost bracket and using the minimum and maximum range of each cost bracket, respondents’ total financial impact can be estimated for the period February 2024 – February 2025. This was found to be between £60.3 - £89 million (N=600 respondents). In 2023 this cost was between £60.8 - £86.3 million (N=613 respondents), suggesting the financial impacts have not become worse when comparing 2024-2025 with 2022-2023. **Illegal waste sites had the greatest financial impact; 43% of respondents who had been impacted by this crime reported costs of more than £50,000.** This was followed by illegal exports (41%) and mis-description (38%), with the estimate of financial impact due to misdescription across all respondents totalling at least £16 million (N= 146 respondents).

Whilst the proportion of respondents who experienced over £50,000 of financial costs was higher in 2023 than 2021 for each waste crime type, there is very little difference between 2023 and 2025. The largest difference was found in illegal burning of waste (causing 9%

of respondents over £50,000 of costs in 2023 and 12% in 2025), though given the margin of error, no waste crime type significantly differed between 2023 and 2025 in terms of financial impact.

## Objective 2: Understand what motivates people to commit waste crime in England, what enables it and what will deter people

### Who commits waste crime?

Waste industry employees estimated that 20% of organisations working in the waste industry in England commit waste crime. This slight increase from the 18% estimate of 2023 is not considered to be statistically significant. These estimates are separate from the percentage of waste estimated to be illegally handled.

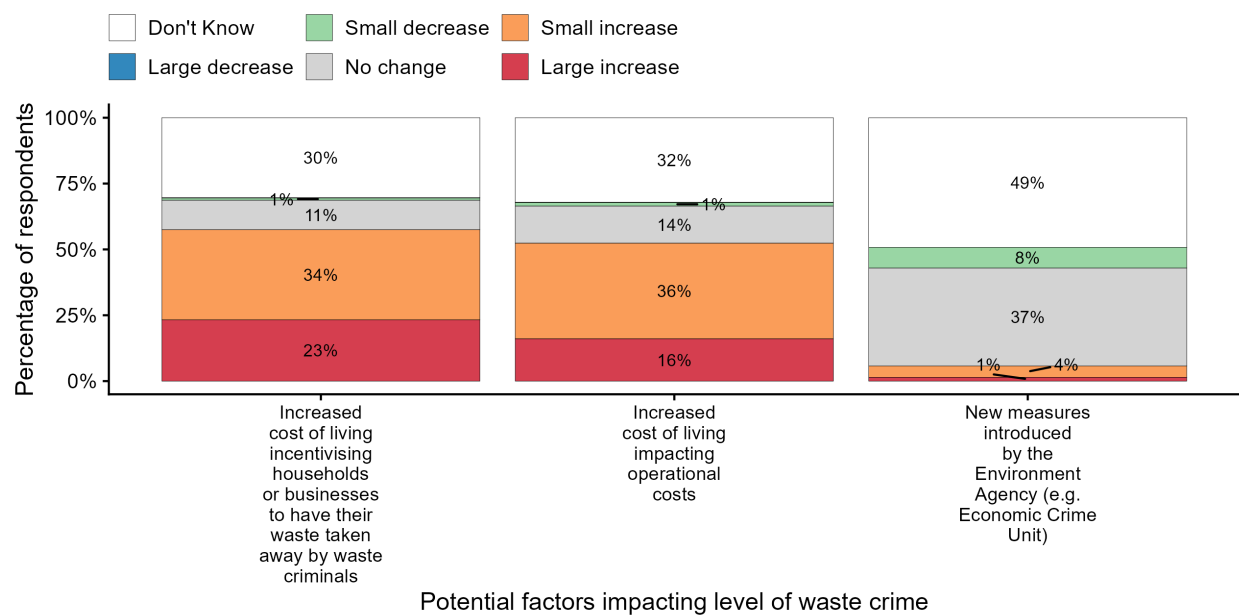
Similarly, when asked about the percentage of organisations committing specific waste crime types, the average estimates made in 2025 were in line with the estimates made in 2023 and 2021, Table 4).

**Table 4 A comparison of the percentage of organisations estimated to be committing different types of waste crime, as estimated by respondents in the waste industry in 2021, 2023 and 2025.**

Waste Crime	2021 estimate	2023 estimate	2025 estimate
Mis-description of waste	24%	27%	25%
Illegal waste sites	18%	19%	20%
Illegal burning of waste	13%	14%	13%
Large scale fly tipping	12%	16%	12%
Illegal exports of waste	17%	16%	19%
Small scale fly tipping	NA	19%	19%

**On average respondents (waste industry and/or landowners/farmers, N=705) estimated that 35% of all waste crimes are committed by organised crime groups.** This is up from 31% estimated to be committed by organised crime groups in 2023 (Environment Agency 2023), and is in line with other findings on the increase of organised crime in rural settings (NFU Mutual, 2024). 89% of landowners/farmers and those in the waste industry felt that waste crimes are most likely to be committed by repeat offenders, working either locally (49%) or regionally (30%). When asked if waste crime is organised or advertised online, 74% of respondents were not aware of waste crime activities being online. This is in line with 2023 findings.

**Waste crime drivers**



**Figure 6 Stacked bar chart to show the extent to which respondents felt waste crime was changed by a range of recent events. All percentages are rounded and may not total to 100% within each bar. Question: “Have any of the following factors contributed to a change in the overall level of waste crime in England in the last 12 months?”, N= 764.**

Respondents were asked if factors at a national scale had influenced the level of waste crime. As seen in 2023, the rising costs of living continued to be perceived as impacting the level of waste crime activity by the highest proportion of respondents (figure 6), acting in two ways. Firstly, 57% of respondents felt this had contributed to an increase of the supply of waste to criminals (by business and households). Secondly, 52% of respondents felt the additional financial pressures on businesses working in the waste industry also increased waste crime activity.

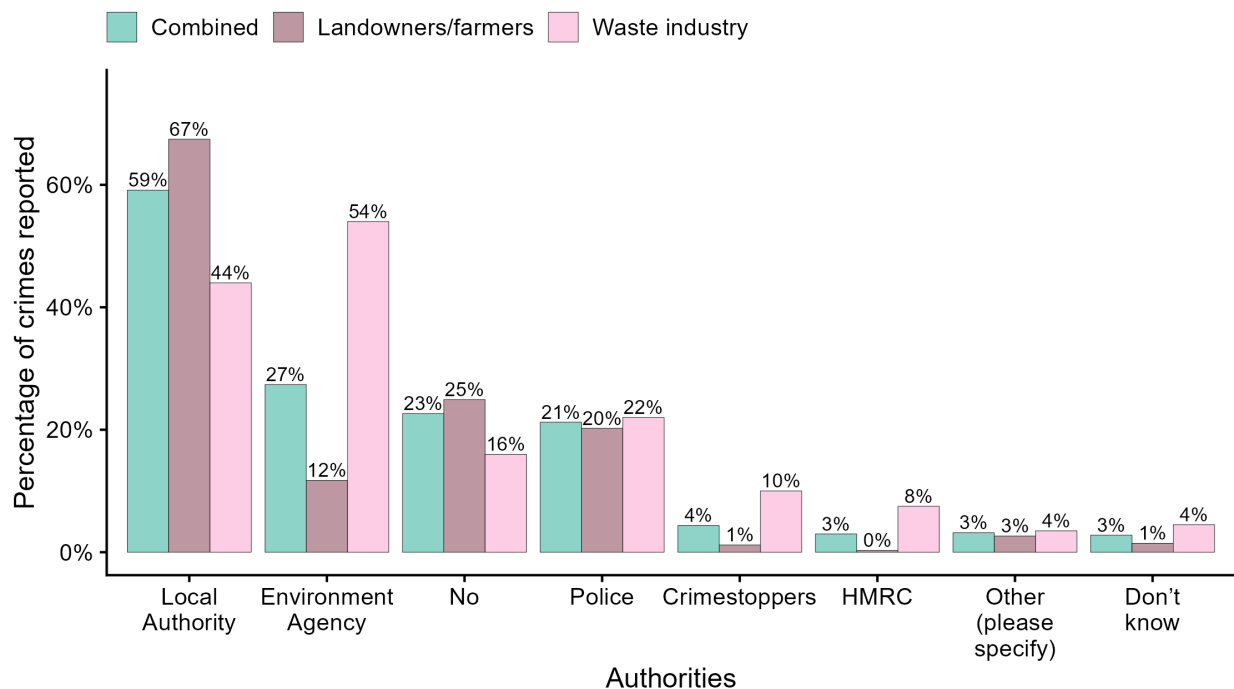
Respondents estimated that the biggest motivators for waste crimes were the size of financial gain, low likelihood of detection, and low likelihood of penalties/enforcement being applied (table 5). This is consistent with the findings in 2021 and 2023.



**Table 5** The top 5 most selected motivators of waste crime, in rank order. Question: *“Which of the following factors do you believe motivate waste crime?”* (N= 705, waste industry and/or landowners/farmers).

Perceived motivators of waste crime	Percentage of respondents
Size of financial gains	84%
Low likelihood of detection	77%
Low likelihood of penalties/enforcement measures being applied	68%
Penalties/enforcement measures do not match the potential gains	59%
Opportunistic crime	46%

### Objective 3: Understand the willingness of the public and industry to report waste crime



**Figure 7 Bar chart to show the percentage of respondents (waste industry, landowner/farmers, and combined percentage) who have reported waste crime, and to which authority (based on their most recently experienced waste crime incident). ‘Other’ authorities stated in the free text response included countryside watch, the NFU and DVLA. Question: “Please think about the most recent incident of waste crime that you, or your organisation, has experienced. Was the incident reported to authorities?”, N=539 (those in the waste industry (N=200) and/or landowners/farmers (N=341) who had experienced waste crime)**

On average, respondents estimated that 27% (25 – 28%, 95% CI) of waste crime incidents are reported to the Environment Agency, which is 3% points higher (though not statistically significantly) than 2021 and 2023. Respondents were also asked if they had reported their most recent experience of waste crime and similarly, only 27% of respondents had reported this incident of waste crime to the Environment Agency. A higher proportion of respondents in the waste industry reported the crime to the Environment Agency compared to the landowner/farmer group (figure 7), where the highest proportion of waste crime incidents were made to local authorities. This difference between groups may reflect the types of crime being experienced (table 3) and the remit of authorities in relation to waste crime types (the advice for most small scale fly tipping incidents is not to report it to the Environment Agency).

Once a report had been made to the Environment Agency, 35% of respondents stated that they did not receive any follow up on this report. Only 9% of respondents reported that there was a follow up that detailed the action taken (a further 16% had follow up to confirm no action would be taken, and the remaining 40% didn't know if there was follow up or if

there was action). However, of the group who were informed action was taken (n=13), 85% of respondents were satisfied with the action, a considerable improvement from 2023 where only 54% of respondents were satisfied with the action.

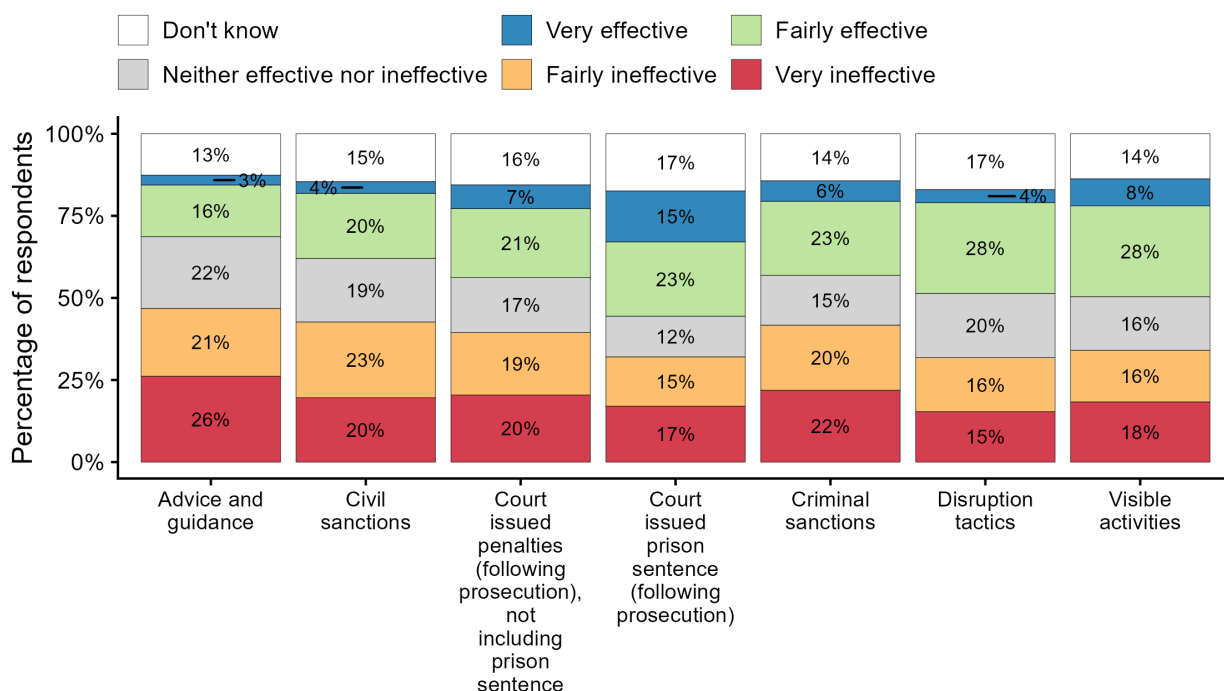
The survey seeks to explore why respondents may not report waste crime to the Environment Agency. This revealed variation in awareness of reporting routes. As found in 2023, respondents were the least certain where to report illegal exports (24% of respondents were very confident in this). In contrast, respondents were more confident in knowing where to report fly tipping (70% of landowners/farmers were 'quite' or 'very' confident in reporting small scale fly tipping and 67% in reporting large scale fly tipping). The waste industry has more confidence in knowing where to report than the landowner and farmers group, for example 79% and 80% responded with confidence in knowing where to report small scale and large scale fly tipping, respectively.

However, when asked why waste crime hasn't been reported to the Environment Agency, respondents stated they are unlikely to make a report to the Environment Agency as they feel there is little that the agency can do to bring perpetrators to justice. Other popular options selected were if a report has been made to another authority (or if respondents were unaware that the incident should be reported to the Environment Agency) or if the loss/damage was negligible. 29% of the waste industry and 23% of landowners/farmers said they'd not reported to the Environment Agency because they have experience of the Environment Agency not acting on past reports.

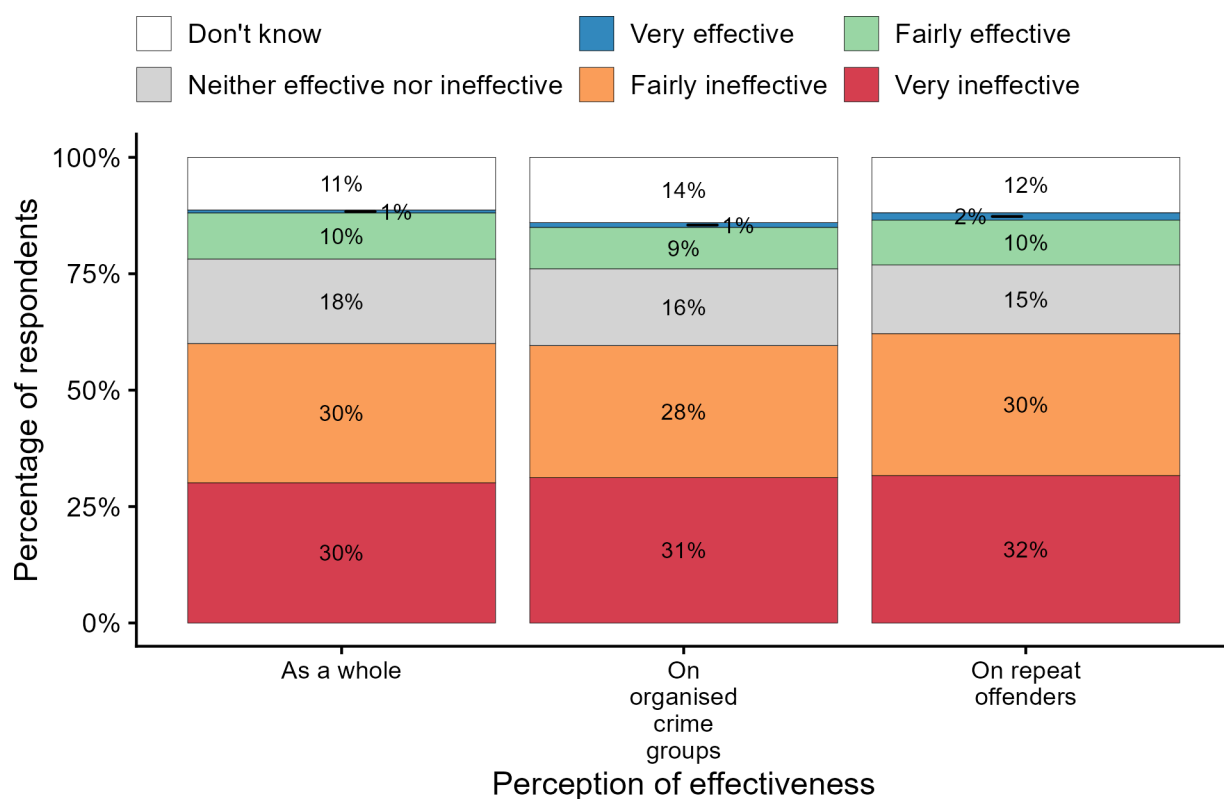
## Objective 4: Identify whether action taken by the Environment Agency and partners is perceived as being effective in reducing the scale of waste crime

Opinions on what makes an effective deterrent against waste crime mirrored the factors that were identified as motivators. The highest proportion of respondents selected financial penalties, followed by the likelihood of being caught, the likelihood of being imprisoned (or other enforcement), confiscation of vehicles and swiftness of sanctions. This was the same ranking as found in 2023.

When asked how effective the available methods that the Environment Agency uses to deter and enforce against waste crime are, respondents' selections reflected this ranking (figure 8). Prison sentences were ranked 'very' or 'fairly effective' by 38% of respondents, making this deterrent the most favourably rated. In contrast, fewest respondents felt that advice and guidance was an effective deterrent and a further 47% of respondents ranked this as 'fairly' or 'very ineffective'.



**Figure 8** Bar chart to show the percentage of respondents who ranked the different actions available to the Environment Agency in terms of effectiveness (ranging from very effective to very ineffective). All percentages are rounded and may not total to 100% within each bar. Question: *"To what extent do you think each of these individual measures undertaken by the Environment Agency have been effective in deterring people from committing waste crimes in England?"*, N= 705 (waste industry and/or landowners/farmers)

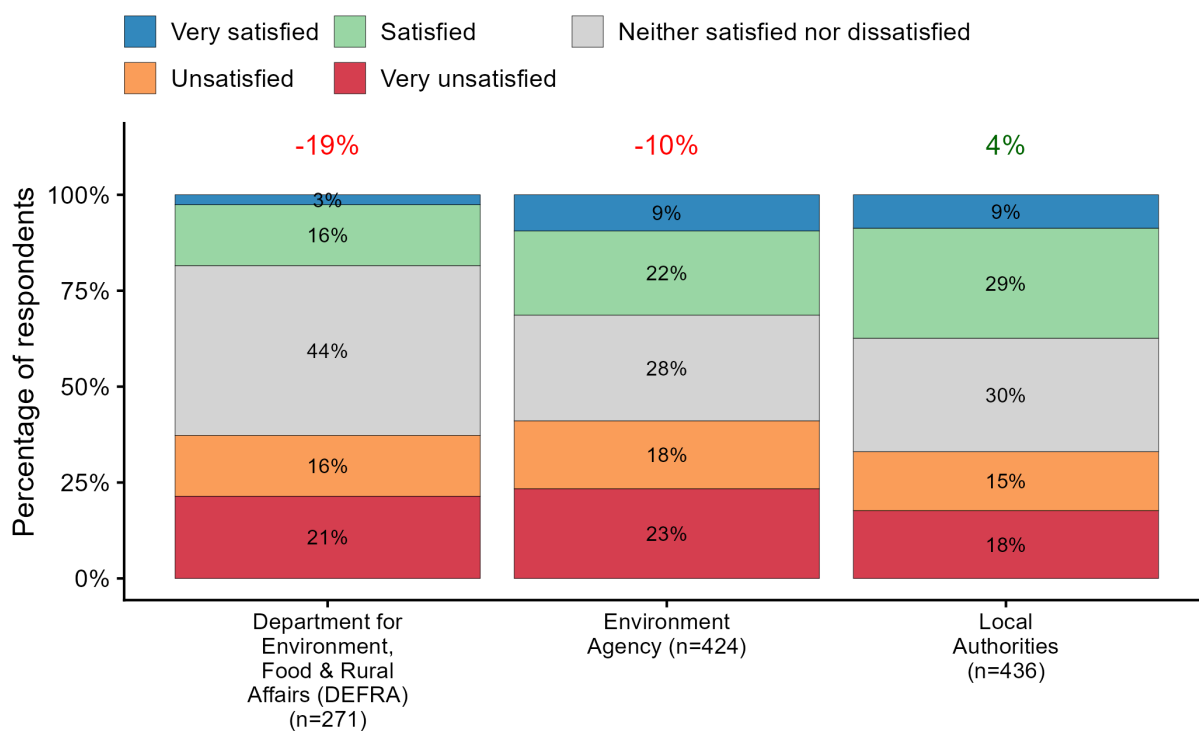


**Figure 9 Bar chart to show the percentage of respondents who ranked the Environment Agency's deterrence in terms of effectiveness (ranging from very effective to very ineffective), in tackling waste crime. All percentages are rounded and may not total to 100% within each bar. Question: "At an overall level, to what extent do you believe measures undertaken by the Environment Agency have been collectively effective in deterring waste crimes in England", N= 705 (waste industry and/or landowners/farmers)**

Accordingly, at an overall level, **only 11% of respondents felt that the Environment Agency is effective (very or fairly) in deterring waste crime**, and respondents saw little differentiation in the effectiveness against organised crime and repeat offenders (figure 9). When asked to rate the Environment Agency's specific effectiveness against specific waste crime types, ratings were marginally improved, however the net opinion across all respondents was that the Environment Agency is ineffective in deterring each waste crime type (table 6). Excluding small scale fly tipping (as this is mainly outside of the Environment Agency's remit), large scale fly tipping was seen as crime types that the Environment Agency is the least effective in deterring.

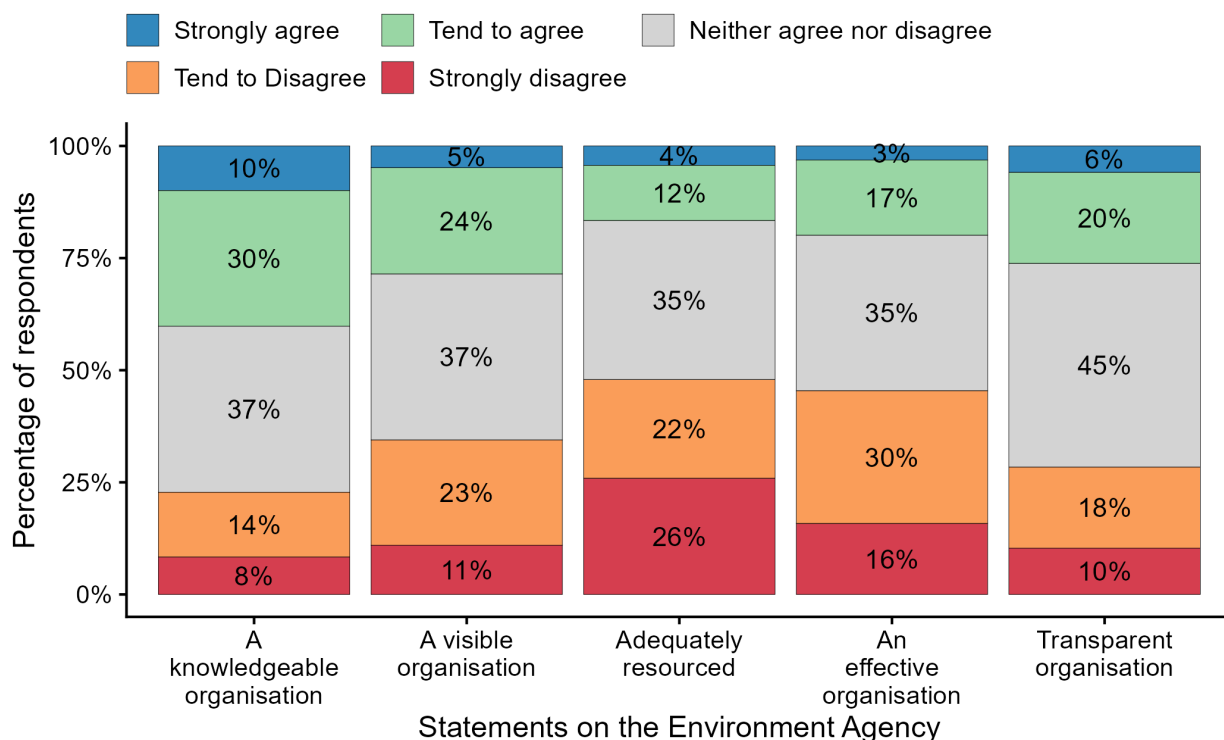
**Table 6 Percentage of respondents who felt Environment Agency measures were ‘very effective’ or ‘fairly effective’ compared with the percentage who felt measures were ‘very ineffective’ or ‘fairly ineffective’ in deterring crime, (N=705, landowners/farmers and/or waste industry).**

<b>Waste Crime Type</b>	<b>Effective (% respondents)</b>	<b>Ineffective (% respondents)</b>	<b>Net effective</b>
<b>Large scale fly tipping</b>	14%	48%	-34%
<b>Small scale fly tipping</b>	8%	63%	-55%
<b>Illegal waste sites</b>	18%	40%	-22%
<b>Illegal burning of waste</b>	16%	39%	-23%
<b>Illegal exports of waste</b>	14%	23%	-9%
<b>Mis-description</b>	12%	32%	-20%



**Figure 10 Stacked bar chart to show satisfaction with the support and/or advice obtained from the relevant government authorities in a position to offer advice, with regards to waste crime. Net satisfaction (show in red and green above each bar) per authority was calculated by the percentage of respondents who were satisfied or very satisfied minus the percentage that were unsatisfied or very unsatisfied. All percentages are rounded and may not total to 100% within each bar. Question: “How satisfied are you with the support and/or advice you obtained from the following authorities, with regards to waste crime?”, N=764.**

Respondents were more likely to be satisfied with support and advice from local authorities than the Environment Agency or DEFRA (figure 10). However, for each organisation the most popular option selected was ‘neither satisfied nor unsatisfied’.



**Figure 11** stacked bar chart to show to what extent participants agreed with assessments of the Environment Agency’s overall performance with regards to waste crime. All percentages are rounded and may not total to 100% within each bar. Question: “To what extent do you agree or disagree with each of the following statements about the Environment Agency and how it operates as an organisation in relation to waste regulation?”, N=764.

Respondents were asked to consider the Environment Agency’s operation in relation to waste regulation overall (figure 11). This revealed that 40% of respondents felt that the organisation is knowledgeable (in contrast only 18% of respondents disagreed with this statement). The outcome for visibility was less clear as 29% of respondents agreed that the Environment Agency is visible, whilst 34% disagreed. However, only 16% of the respondents felt that the Environment Agency is adequately resourced (and 48% disagreed that it is adequately resourced).



# Conclusions

The results of the 2025 National Waste Crime Survey show that the waste industry continues to perceive waste crime to be widespread across England. Landowners and farmers, as well as the waste industry, also continue to be impacted by waste crime. Respondents felt that approximately half of the organisations in their respective sectors are impacted by waste crime. The most recent data on illegal waste sites (Chief Regulator Report, Environment Agency, 2024) suggests there has been a reduction in active illegal waste sites (that are known to the Environment Agency). However, the consistency found across survey years, both in the proportion of respondents impacted by waste crime and in the estimates of the scale of waste crime, suggests any reduction in illegal waste sites is not being felt by the waste industry, or potential victims.

Increases in cost of living continues to be perceived as a motivating factor for committing waste crime - businesses are thought to be more willing to supply their waste to criminals to save money, combined with illegal waste handlers looking for ways to undercut the legitimate market. Respondents estimated that financial gains are attracting organised crime, thought to be responsible for over a third of all waste crime.

Despite continuing to be considered a knowledgeable organisation, respondents to the 2025 survey felt that the Environment Agency is not effective in its response to waste crime, reinforcing the 2023 findings. Respondents felt that waste crime requires severe sanctions. Court issued penalties, visible activities, disruption tactics and criminal sanctions were again considered the most effective deterrents against waste crime, echoing the 2023 findings. Further research is required to compare this finding with the Environment Agency's internal metrics on waste crime. Whilst there is a suggestion that reporting rates are increasing, 27% of waste crime being reported to the Environment Agency remains low, though the increase in satisfaction with follow up action (when it occurred) is encouraging.

The findings of this report, combined with the consistent evidence from the 2023 survey provides a valuable baseline of the scale and nature of waste crime. It creates a better understanding of the challenges faced and the work still to be done. The findings will be used to inform the Environment Agency's strategic approach to stopping waste crime, where to direct its resources and how we work with industry, our customers, and our partners. The survey will continue to be developed in future iterations, remaining relevant to the current waste crime prevalence and nature.

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