



WASTE  
MANAGEMENT

LCBA  
LOW CARBON BUSINESS ACTION  
MEXICO



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# WASTE MANAGEMENT

## DEFINITION

Waste management includes activities and actions to manage waste from its inception to its final disposal, and includes its collection, transport, treatment and disposal, together with the monitoring and regulation of waste management processes.

## TECHNOLOGIES



Waste collection and management



Upcycling



Landfill and remediation treatments



Recycling

# MARKET OPPORTUNITY MEXICO

## WASTE MANAGEMENT

### Market overview

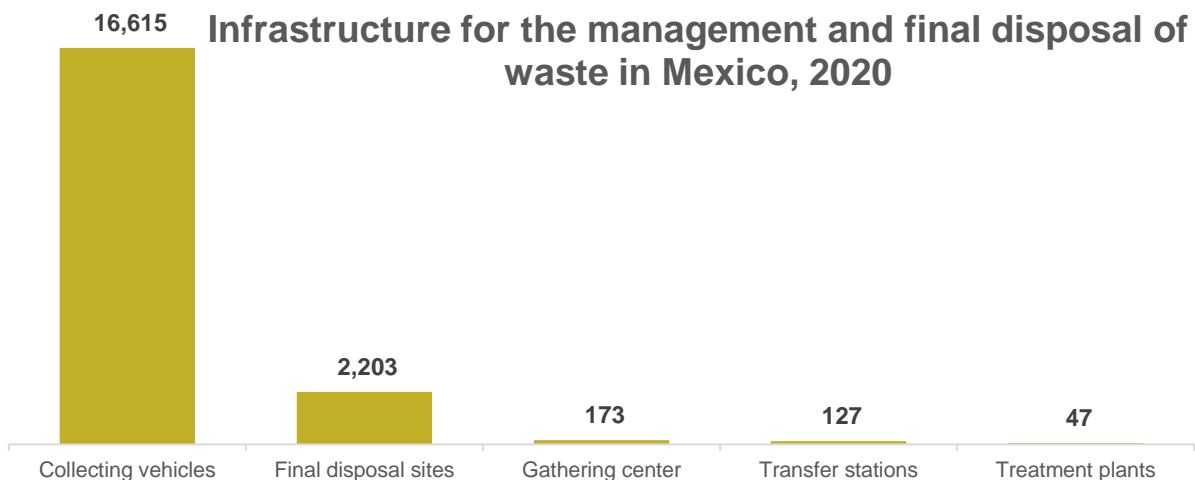
- Mexico's Waste Management Guidelines are under the General Law for the Prevention and Integral Management of Waste.
- Corporations in Mexico are showing increasing interest in zero waste initiatives.
- The marketing, distribution and delivery of single-use plastics is prohibited in Mexico City since 1 January 2021.

## Key business opportunities for European companies

- 1 **Solid waste treatment, waste collection and recycling.** "Vallejo-i", a project to boost the Vallejo industrial zone in Mexico City post COVID-19, includes investments in three waste management projects focused on treatment, collection and recycling technologies.
- 2 **Integrated circular economy and waste to energy solutions to treat household waste.** The Naucalpan municipality's Climate Action Program 2013-2023 identifies the abovementioned solutions as key to reducing its greenhouse gas (GHG) emissions.
- 3 **Waste recycling and upcycling.** Initiatives to pay state taxes with recycled materials have recently been implemented. Several fashion stores have clothes recycling initiatives.
- 4 **Innovative technologies to manage and recycle municipal solid waste.** Local governments lack the means to properly manage and recycle municipal solid waste.
- 5 **Waste management solutions for large corporations.** Many Mexican corporates need solutions to be able to meet their own global Environmental Social and Corporate Governance (ESG) standards and to effectively respond to increasing government pressure to reduce emissions and waste.

### Sector highlight

The following graph shows the infrastructure for waste disposal in Mexico in 2020.



Source: INEGI, SEMARNAT, ECOCE



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### Sector insights

National standards like NMX-AA-180-SCFI-2018 describe methods and procedures for the aerobic treatment of organic matter in urban waste and provide guidelines for waste with special management requirements. They also provide guidelines for commercial information requirements and quality parameters for final disposal.

### Drivers

- International institutions such as the Inter-American Development Bank and the German development agency GIZ, provide project financing for waste management.
- The current administration is developing a National Circular Economy Strategy.
- There is increasing pressure on corporates to implement sustainable waste management technologies. The Mexican government and Mexico City have introduced ambitious plans and policies to minimize waste and reduce emissions. Most international companies in Mexico are also mandated to meet global sustainability strategies and goals set by their headquarters.

### Barriers

- Some municipalities lack sufficient infrastructure and equipment to manage and recycle municipal solid waste.
- Competitiveness in the waste management industry varies greatly from region to region. There are some regional or state monopolies.
- As a consequence of COVID-19, many companies prioritized the incineration of mixed waste over using landfills; this is the main revenue source for the waste management industry. A slowdown for the industry is expected.

### Case studies

- A **global soft drinks producer** has publicly committed to collect and recycle a bottle or can for each one sold by 2030 as well as making packaging 100% recyclable by 2025 - this commitment directly impacts all bottlers in Mexico and provides a large opportunity for waste management and recycling technologies.
- There is a public tender to manage Monterrey Metropolitan zone's solid waste worth 10,153 million MXN (~419 million EUR).

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