



HEATHCOTE  
HOLDINGS

# Annual Report

Focus on  
Waste Management Expertise



HEATHCOTE HOLDINGS

SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

# An Introduction to Heathcote Holdings

**Heathcote Holdings is a family-run business built on a simple principle: we never let the customer down.**

Across our group of companies, we specialise in solving critical operational challenges for businesses who require waste management, plant and welfare hire, land management and environmental services. In addition, we have developed integrated solutions for construction, infrastructure, hospitality sector and events.

**We recognise that many of our services are not our customers' core expertise—but they are ours.**

That's why we take pride in being problem-solvers, delivering solutions that are effective, cost-efficient, and built around our customers' needs. A common thread runs through all our businesses: we provide the critical support that enables our customers to focus on their business and their customers.

**Over the last 20 years, Heathcote Holdings has grown from humble beginnings to a thriving enterprise with:**

**£164m annual turnover**

**£130m gross assets**

**20 individual sites**

**1,054 employees**



# A Family Business

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All figures included in this report are up-to-date to the 30th April 2024, unless otherwise stated.



# Heathcote Holdings Three Areas of Expertise

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## WASTE MANAGEMENT

**COUNTRYstyle**  
RECYCLING

Commercial waste management and recycling

**enVar**

Transformation of green waste into compost

**Verigreen**

Anaerobic digestion for energy recovery

**COMPACT&BALE**  
TOTAL WASTE & RECYCLING SOLUTIONS

Waste compacting equipment for businesses

**fgs** industrial facilities management

Industrial cleaning and labour supply

## PLANT & WELFARE



Welfare and toilets provisions for hire

**FGS**  
PLANT

Plant and powered access platform hire

**HIRE**  
ACCESS  
PLATFORMS

The South West branch of FGS Plant

**CLEMENTS**  
PLANT & ACCESS HIRE

The Midlands branch of FGS Plant

## LAND & ENVIRONMENTAL

**fgsagri**

Agricultural services and land management

**fgspilcher**

Tailored land drainage and civil engineering

**Habitat**  
Regeneration

End-to-end ecological and offsetting solutions

**fgsorganics**

Supply and application of renewable fertilisers

**DIRECT ENVIRO**  
SERVICES

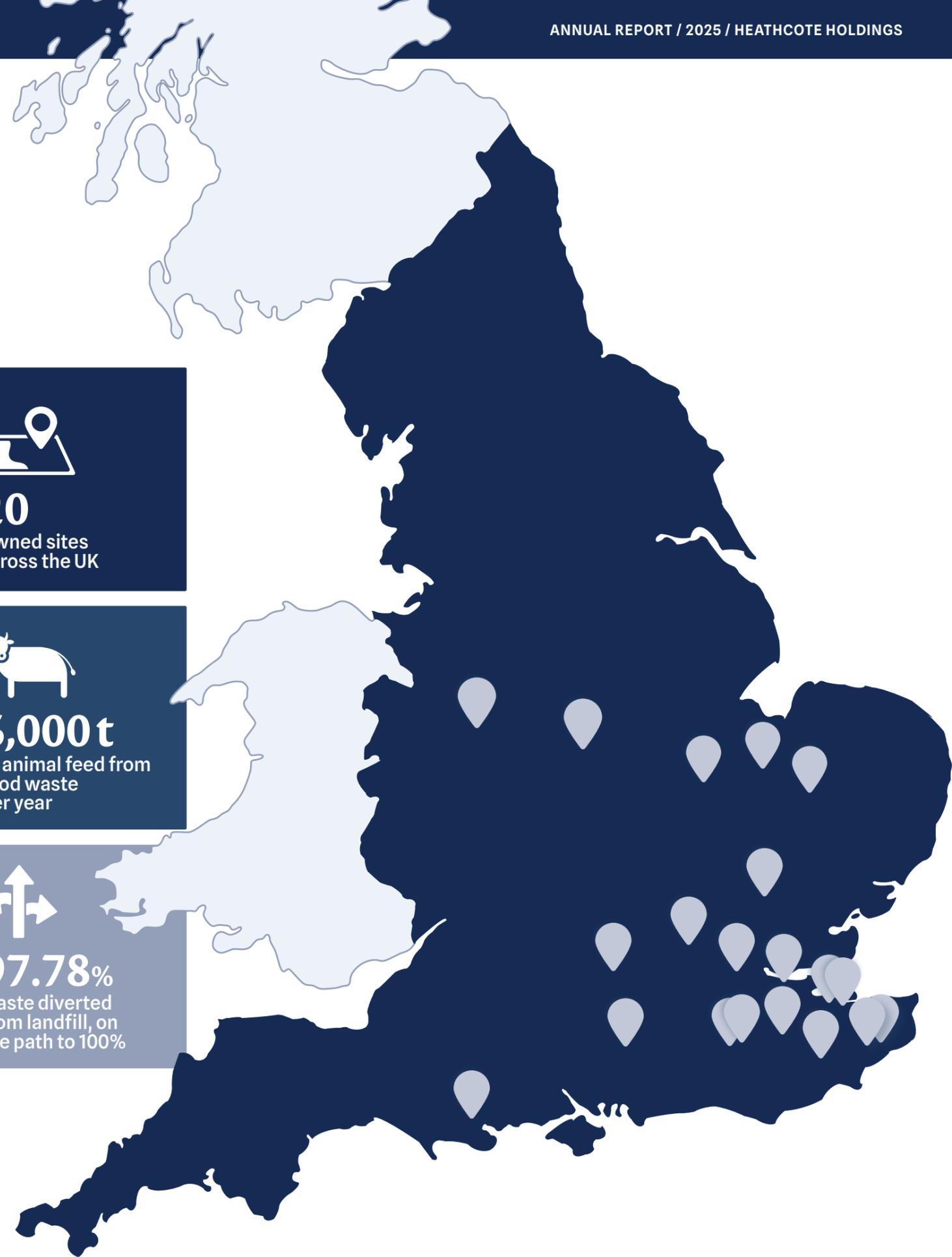
Expert vegetation and traffic management services

# The Group in Numbers

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# Business Performance

This financial year has been marked by significant turnover growth and profitability improvement, largely derived from Waste Management Services and strategic acquisitional investments within the Waste and Plant Hire Sector.



**£164m**

Heathcote Holdings  
annual turnover



**£100m**

Countrystyle  
annual turnover



**£105m**

Heathcote Holdings  
Net Assets



**16%**

return on capital  
employed

**Trevor Heathcote**  
Chairman, Heathcote Holdings



**Martin Heathcote**  
CEO, Heathcote Holdings



**Nathan Heathcote**  
Director, Four Jays



**Tony Godden**  
CFO, Heathcote Holdings



## Financial Statement

Total revenue has increased by 22% year on year to £164 million and operating profit has improved by 130%. This was driven by strong performance across many of our segments, leveraging on operational gains and efficiencies.

The group has maintained healthy cashflows, ensuring sufficient liquidity to meet short-term obligations whilst funding expansion opportunities. Alongside investing circa £29m on fixed assets across all areas, ensuring replacement of ageing equipment is maintained together with investing in new plant, fleet and technologies to remain compliant and competitive in the industry.

Looking ahead, we anticipate continued growth, however we will face strong headwinds from tax increases, insolvencies in the sector, changing and uncertain regulations as well as movement in market conditions.

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# Committed to Health & Safety

For the people who work for us and with us. The Board of Directors at Heathcote Holdings considers the Health, Safety and Wellbeing of its employees, customers and the public is of paramount importance to us as a business.

## Samsara: Enhancing Fleet Safety & Compliance

As Heathcote Holdings continues to grow, the demand for a robust telematics and safety monitoring system has become imperative. The existing vehicle telematics system faced limitations, including intermittent footage from forward-facing cameras and a lack of comprehensive visibility into driver behaviour. To address these challenges, Countrystyle implemented Samsara's dual-facing AI Dash Cams and Vehicle Gateways, ensuring full operational oversight.

The group adopted a phased approach to implementation, gradually enabling safety alerts to ease driver adaptation to the new system. Once familiarised, drivers were monitored for key safety events such as seatbelt compliance, mobile phone use, and distracted driving. The system automatically captures and uploads footage of these events, allowing fleet compliance teams to efficiently review and coach drivers



Carl Leader, Logistics Director  
Countrystyle Recycling

on improved behaviours. Additionally, the Samsara Camera Connector integrates third-party cameras, providing 360-degree visibility. This centralised dashboard eliminates siloed information and manual reporting inefficiencies, making fleet management more effective.

Encouraged by this success, our plan is to expand Samsara's use across our whole fleet, including company cars, trailers, and dustcarts. This standardisation aims to enhance safety & operational efficiency moving forward.

"Since the implementation of Samsara Countrystyle driver scores have improved by 21% and we have seen a 21.6% reduction in total insurance claims, with 40% of those claims non fault, zero cost.

A reduction in both infringements and alerts, reporting times down to 1.6 days from 6.0, means clients are seeing the difference."

## ZoneSafe Alert Systems

Accidents involving heavy machinery, such as forklifts, are a major concern due to blind spots, obstructed vision from loads, and potential pedestrian collisions. To mitigate these risks, Countrystyle Recycling and Envar Composting have installed ZoneSafe Proximity Alert Systems across all mobile plant equipment at their sites.

These systems create virtual detection zones around both machinery and personnel, alerting operators and workers to potential dangers before collisions occur. This proactive approach enhances safety and reduces the risk of accidents.

## Achievements

- ✓ All key business directors attended a IOSH Leading Safety Course.
- ✓ We have retained the external certification of our H&S management system to the international ISO 45001 standard.
- ✓ In October 2024, Countrystyle was recognised by Samsara at the Brakes Awards for the 'Safest Operator' category and were proud to accept 1st place.

We will continue to prioritise health & safety performance, through our Compliance Strategy to ensure that our people and public are kept safe.

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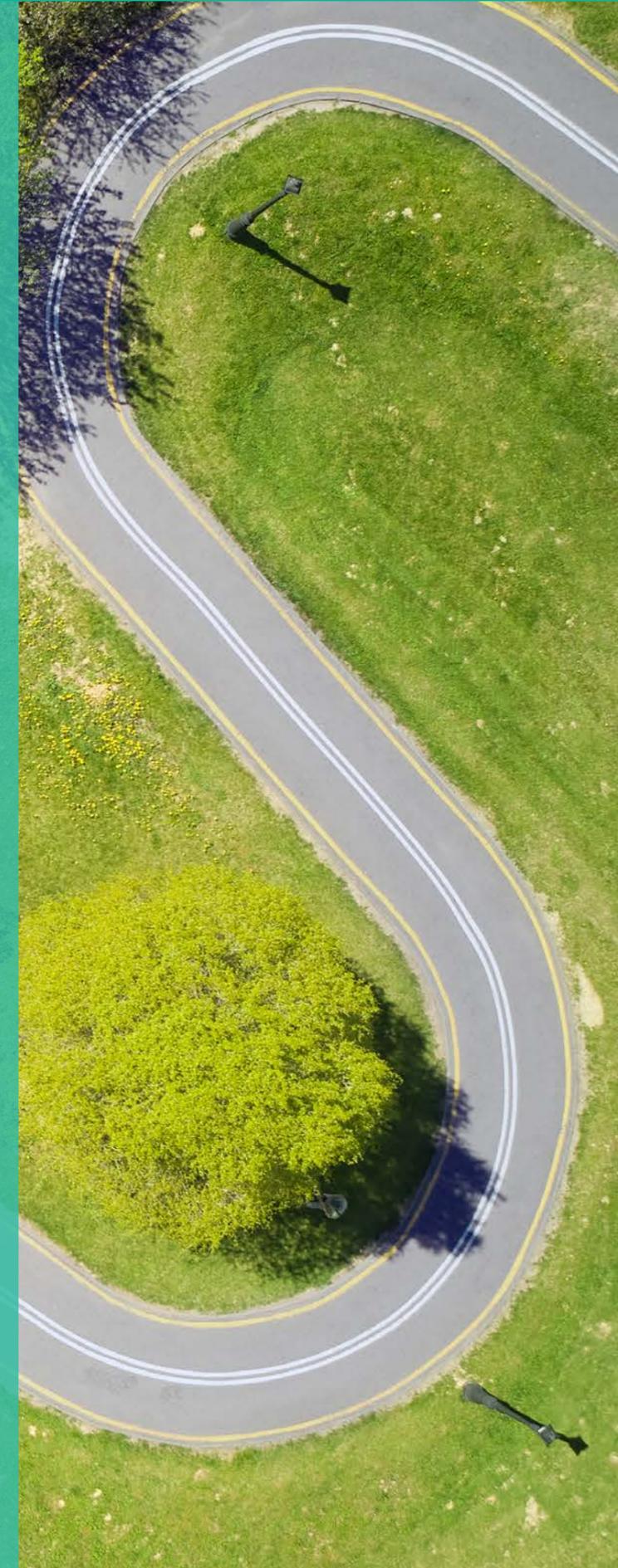
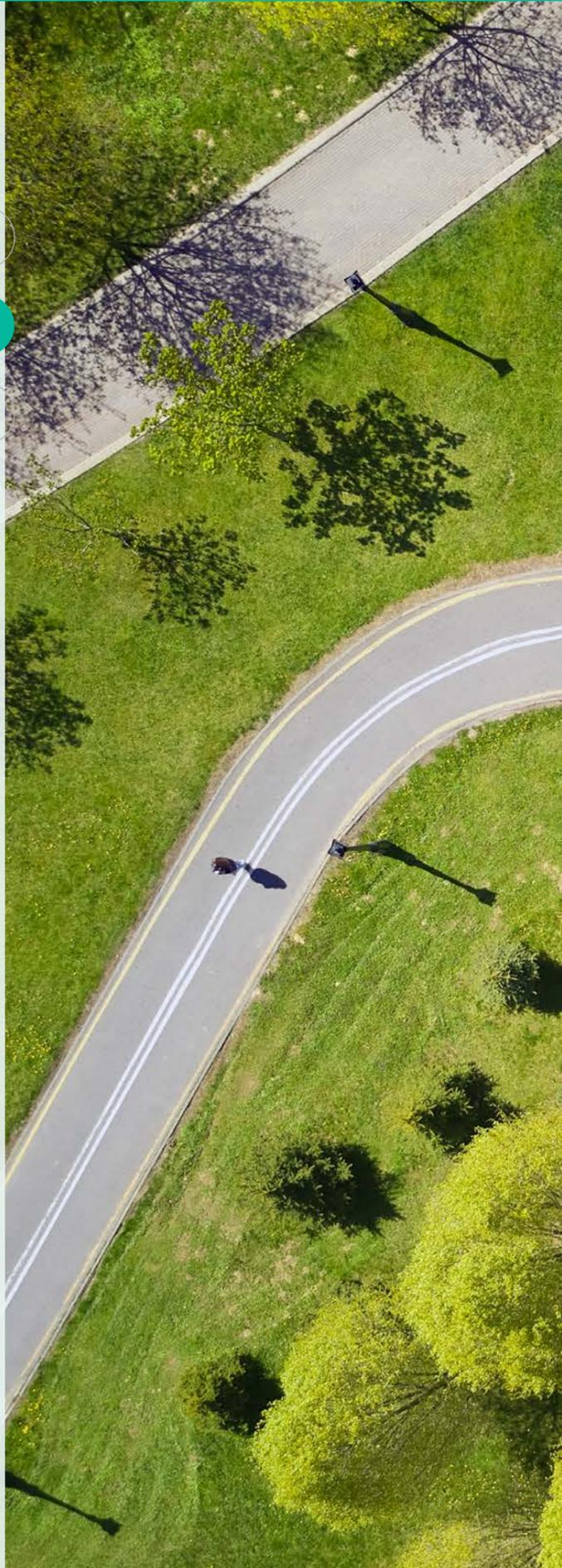
# Sustainability & CSR



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# Carbon Reduction Plan

Countrystyle Recycling recognises that the energy, products and services it consumes cause the emission of greenhouse gases to the atmosphere, which contribute to climate change.

As part of our overall sustainability goals, we are committed to continual improvement in the management and reduction of energy consumption and carbon emissions. We will achieve this by:

Managing energy consumption via a systematic, auditable energy management system, certified to ISO 50001	Implementing a sustainable energy strategy to reduce our carbon emissions by 45% by 2030 and to reach Net Zero by 2040
Ensuring our continual compliance with energy related legislation	Continually improving the energy efficiency of our existing sites
Ensuring that any new recycling plants contribute to the sustainable energy strategy	Regularly monitoring and reviewing energy consumption against our reduction targets
Ensure the availability of information and necessary resources are made available to achieve these goals, cost-effectively	Managing our Scope 3 emissions from waste, water, transport, products and services, via our ISO 14001 Environmental Management System
Promoting energy awareness among our staff	Communicating progress to internal and external interested parties
Assessing the energy efficiency of significant energy-using plant, equipment and processes during the design and procurement process, including new buildings and refurbishments	

This plan is regularly reviewed and communicated to employees, contractors, visitors, suppliers and other key stakeholders.

Martin Heathcote | Chief Executive Officer

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# Sustainability Ambition

## Embedding Sustainability in Our Operations

In 2023/2024, we made strong progress integrating sustainability across our business.

Key achievements include the adoption of core policies such as our Sustainability Policy, Sustainable Sourcing Policy, and Carbon Reduction Plan.

These were backed by practical initiatives like:

-  Alternative fleet fuel trials, including our first HVO (green diesel) delivery.
-  Fleet innovations, with pilots for electric vehicles.



## Carbon Reducing & Reporting

We earned Planet Mark certification for 2023/2024, reflecting a 5% reduction in CO<sub>2</sub> emissions. Our commitment to transparency extends to:

-  Enhanced Scope 3 emissions reporting.
-  Supply chain sustainability improvements.
-  A PPE recycling programme.
-  Ensuring Credibility and Compliance.

To maintain accuracy in carbon reporting, we collaborate with Planet Mark, ensuring compliance with ISAE 3410 standards. This strengthens our Carbon Reduction Plan and aligns with broader ESG objectives.



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# Reducing Our Footprint

At our core, we recognise the importance of minimising our environmental impact while providing essential waste management services.

Our sustainability strategy focuses on reducing carbon emissions, optimising resource recovery, and increasing efficiency across all operations.

## Addressing Fleet Emissions

Our fleet is responsible for 93.8% of our emissions, contributing 12,504.7 tCO<sub>2</sub>e annually. As one of the largest contributors to our footprint, we are taking decisive action to reduce emissions from transport by:

- ✓ Investing in alternative fuel and electric vehicles.
- ✓ Enhancing fleet efficiency through route optimisation and smart logistics.
- ✓ Exploring low-carbon fuel alternatives to further reduce environmental impact.

## Optimising Operations for Lower Emissions

We are continually investing in eco-friendly fleet upgrades, route optimisation, and advanced logistics planning to reduce fuel consumption and lower carbon emissions. Our commitment to sustainability includes:

- ✓ Transitioning to low-emission and alternative fuel vehicles.
- ✓ Implementing AI-powered route planning to reduce mileage.
- ✓ Working with clients to optimise waste collections and minimise unnecessary transport.

## Driving Innovation in Sustainable Waste Management

We are committed to staying ahead of industry changes, regulatory shifts, and emerging sustainability trends.

By working with businesses, councils, and industry leaders, we help shape a greener, more responsible waste sector.

Through these initiatives, we are taking measurable steps toward reducing our footprint and creating a sustainable future for our clients and communities.

## Maximising Resource Recovery

Our goal is to divert waste from landfill and ensure valuable materials are repurposed. Through strategic investments in recycling, composting, and energy recovery, we help businesses transition toward a circular economy.

- ✓ Partnering with local authorities and commercial clients to increase recycling rates.
- ✓ Expanding our waste-to-energy and composting capabilities.
- ✓ Collaborating with manufacturers to reintegrate recovered materials into new products.

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# Increasing Our Handprint



The River Walk we opened in March 2025 at our Ridham site.

## Enhancing biodiversity and natural spaces

We are actively supporting the restoration and enhancement of local environments

### Biodiversity Programme:

Integrated into school educational plans and our community engagement activities.

### River Walks Clearance and Maintenance:

Supporting natural habitat improvements and public access to green spaces.

### Habitat Regeneration Work:

Working in partnership with Habitat Regeneration, they provide assistance with Biodiversity Net Gain Projects from initial works and establishment through to long term solutions and management.

## Supporting young people and local communities

Our social value activities aim to empower and uplift those in our communities, including:

### Young Lives Foundation Partnership:

Fundraising and awareness through events like our Pluckley to Paris cycle challenge, working closely with Kent County Council to provide support for young people in care.

### Green School Awards:

Promoting sustainability awareness and action among local schools

### Social Value Construction Gold Certification:

Recognising our commitment to delivering community and social benefits through our operations.



Celebrating students' green achievements by sponsoring Social Enterprise Kent's Green School Awards.



The Pluckley to Paris team on the finish line, in May 2025

## Promoting inclusive employment and staff wellbeing

### Wellbeing programmes:

Providing comprehensive support through our Employee Assistance Programme (EAP), GP24 service, and Mental Health First Aiders.

### Employment of ex-offenders:

Creating opportunities and social inclusion through targeted recruitment initiatives and supporting projects like **Project Accountability** focused on life after prison for offenders.

### Giving back to families:

Each year, we express our appreciation to our staff and their families by providing turkeys or veggie boxes at Christmas, along with hosting an annual summer barbecue to give back to the families.

# Innovation for a Sustainable Future

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## Habitat Regeneration

**Habitat Regeneration delivers end-to-end ecological solutions, offering a full-service approach to habitat creation, enhancement, and long-term management.**

The team provides expert, practical services that support biodiversity net gain, nutrient neutrality, environmental offsetting, and sustainable land use. Working in partnership with FGS Agri and FGS Pilcher under the Heathcote Holdings group, Habitat Regeneration combines ecological expertise with skilled operators and specialist equipment to deliver projects that maximise environmental outcomes.

### The impact of Habitat Regeneration

- 
**Supports Biodiversity Net Gain**  
 Habitat Regeneration actively assists with the delivery and maintenance of Biodiversity Net Gain Projects.
- 
**Delivers Practical Solutions for Environmental Offsetting**  
 Full-service habitat creation and management, enabling clients to meet environmental offsetting requirements
- 
**Promotes Long-Term Sustainable Land Use**  
 Proactive ecological planning and ongoing site management, to ensure that landscapes remain resilient and productive.



## DIRECT ENVIRO SERVICES

**Direct Enviro Services delivers comprehensive highway maintenance solutions by combining high-quality vegetation management with state-of-the-art equipment and advanced AI technology.**

By prioritising both performance and the environment, Direct Enviro Services ensures safe, efficient project delivery alongside long-term ecological benefits. This balance of innovation and responsibility promotes healthier ecosystems and contributes to sustainable green space management for the future.

### The impact of Direct Enviro Services

- 
**Promoting Biodiversity in Highways**  
 Verge and vegetation management that supports biodiversity, while maintaining safe and accessible highways and footpaths.
- 
**Sustainable Asset Management for the Future**  
 Specialist equipment and environmentally responsible practices, creating sustainable highways asset management.
- 
**AI-Driven Green Space Management**  
 By applying AI technology to plant detection, tree inventories and litter hotspots, Direct Enviro Services delivers smarter, more sustainable solutions for managing green spaces.

# Innovation for a Sustainable Future

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**Compact & Bale delivers complete waste handling solutions, specialising in efficient, sustainable systems for recycling and resource recovery.**

Our expert team provides practical, results-driven services that support environmental compliance, carbon reduction, and circular economy goals. Working in partnership with Countrystyle, and as part of the Heathcote Holdings group, we combine technical expertise with specialist equipment and full on-site training — ensuring every project delivers measurable environmental and operational benefits.

## The impact of Compact & Bale

- 
**Delivers Practical Solutions for Resource Recovery**  
 Implements baling and compacting systems to reduce waste volume and increase recycling efficiency on commercial sites.
- 
**Supports Carbon Reduction Through Waste Optimisation**  
 Helps businesses lower emissions by streamlining waste handling processes and diverting recyclables from landfill.
- 
**Drives Circular Economy Outcomes**  
 Enables reuse and repurposing of materials through tailored waste management strategies that align with environmental compliance and sustainability goals.



**FGS Pilcher delivers integrated enabling works, civils support, and infrastructure services for large-scale renewable energy schemes.**

Working within sensitive environmental settings and complex site conditions, FGS Pilcher combined practical expertise with innovative solutions to keep programme-critical timelines on track, achieving zero environmental non-conformances, safeguarding biodiversity and minimising surface disturbance.

## The impact of FGS Pilcher on Solar Delivery

- 
**Delivers Enabling Works for Renewable Infrastructure**  
 From land preparation and ecological protection to welfare setup and access routes, FGS Pilcher ensures sites are ready for safe and efficient delivery.
- 
**Provides Innovative Ground Engineering Solutions**  
 Specialist testing and the Helicasol screw piling system offers a low-impact, stable foundation approach, reducing risk and protecting sensitive soils.
- 
**Supports Seamless Operations**  
 Careful planning of logistics, staging, and mechanical install support, enables smooth progression from groundwork through to solar frame installation.

# Improving Environmental Outcomes

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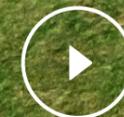
## Habitat Regeneration

Habitat Regeneration delivers full-spectrum ecological services focused on creating, enhancing, and managing habitats for long-term environmental resilience.

As part of Heathcote Holdings, and working alongside FGS Agri and FGS Pilcher, the team combines ecological expertise with practical delivery to support biodiversity net gain, nutrient neutrality, and sustainable land use.

### Environmental Impact Highlights

- 
**Biodiversity Net Gain**  
 Proactively supports the design, implementation, and maintenance of habitats that meet biodiversity net gain targets.
- 
**Environmental Offsetting**  
 Offers tailored habitat creation and management to help clients meet offsetting obligations.
- 
**Sustainable Land Use**  
 Long-term ecological planning ensures landscapes remain productive, diverse, and resilient.



An aerial view of a 91-acre wetland creation project for habitat enhancement on a site that is recognised as a special protection area (SPA) & Site of Special Scientific Interest (SSSI), done in collaboration with sister company FGS Pilcher. [Watch our video about the project here.](#)

# AI Separates Weeds from Trees

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## DIRECT ENVIRO SERVICES

Direct Enviro Services integrates advanced AI technology into highway vegetation management to deliver smarter, safer, and more sustainable outcomes.

Their AI-driven systems distinguish between weeds and beneficial plant species, enabling precision maintenance that protects biodiversity while ensuring infrastructure safety.

### AI Driven Innovation

- 
**Smart Plant Detection**  
 AI tools accurately identify plant species, enabling targeted weed control without harming trees or native flora.
- 
**Efficient Vegetation Management**  
 Automated systems streamline operations, improving accuracy in tree inventories and litter hotspot detection.
- 
**Sustainable Green Space Stewardship**  
 Data-driven insights guide ecological decisions, balancing environmental care with operational efficiency.



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# Compacting Waste. Reducing Costs.



**Compact & Bale delivers efficient waste handling solutions that help businesses reduce costs and environmental impact.**

By implementing advanced compacting and baling systems, they streamline recycling processes and support carbon reduction goals. As part of Heathcote Holdings and working with Countrystyle, their approach combines technical expertise, specialist equipment, and on-site training to deliver measurable results.

## Key Benefits

- 
**Cost-Efficient Waste Management**  
 Reduces waste volume through compacting and baling, lowering disposal costs and increasing recycling rates.
- 
**Carbon Reduction Through Optimisation**  
 Diverts recyclables from landfill, helping businesses meet sustainability targets.
- 
**Circular Economy Enablement**  
 Supports reuse and repurposing of materials through tailored waste strategies aligned with environmental compliance.



Compact & Bale helped The Felix Project, a charitable organization collecting edible but unsaleable food and delivering it to people in homeless communities or low income areas, make their cardboard waste profitable and in line with their sustainability goals and ethics. [Watch the video here.](#)

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# Engineering Solar Energy to Be Lower Impact

**fgspilcher** FGS Pilcher provides enabling works and infrastructure support for renewable energy projects, with a focus on minimizing environmental impact.

Operating in sensitive settings, they use innovative ground engineering techniques—such as Helical screw piling—to reduce surface disturbance and protect biodiversity. Their integrated approach ensures smooth delivery from land preparation to solar frame installation.

## Key Benefits

- ✓ **Low-Impact Foundations**  
Helical screw piling protects soil integrity and reduces disruption in ecologically sensitive areas.
- ✓ **Ecological Safeguarding**  
Careful planning and execution prevent environmental non-conformances and support biodiversity.
- ✓ **Efficient Renewable Infrastructure Delivery**  
Seamless coordination of logistics, civils support, and mechanical install ensures timely and responsible solar energy deployment.

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# Waste Management



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# E2E Total Waste Management

**We are committed to delivering comprehensive waste management solutions that serve both our large commercial partners and SMEs seeking sustainable and efficient waste handling.**

Our integrated methodology aims to convert waste into valuable resources, fully closing the loop from collection through to reuse. Each of our specialist businesses contributes significantly to this circular system, enabling us to provide dedicated, end-to-end waste management services.

We offer a range of comprehensive solutions for our clients, from waste collection to fully compliant and sustainable disposal sites that allow for further reuse where applicable. We are able to demonstrate a reduced reliance on landfill and an increased ability to turn clients waste into energy and resource.

As a group, we are able to utilise the knowledge and abilities of all our companies to not only support agricultural regeneration, carbon reduction and a circular approach to our waste management services but to also deliver real time benefits to business of all sizes in all areas from start to finish.



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# Waste Management Expertise

**Our waste brands deliver total waste management, covering everything from collection and processing to recycling and resource recovery.**

While Countrystyle Recycling is the largest and most recognised part of our waste division, our other businesses—Envar, Compact & Bale, Verigreen, and FGS Industrial—play essential and growing roles.



**Waste collection, processing and recycling**

Countrystyle Recycling is a leading independent waste management company in Kent, offering tailored, sustainable recycling solutions across the UK, committed to zero avoidable landfill.



**Transformation of green waste into compost**

Envar Composting Ltd operates eight UK sites using in-vessel & windrow composting to transform organic waste into certified soil improvers, supporting sustainable agriculture and reducing landfill.



**Anaerobic digestion for energy recovery**

Verigreen turns food waste into renewable energy and nutrient-rich biofertiliser through anaerobic digestion, a closed-loop, sustainable waste solutions for commercial sectors across the UK.



**Waste compacting equipment for businesses**

Compact & Bale supplies innovative waste compactors and balers, helping UK businesses reduce landfill, cut costs, and improve recycling through automation, tailored services, and reliable equipment.



**Industrial cleaning and labour supply**

FGS Industrial Facilities Management delivers tailored industrial cleaning, waste clearance, landscaping, labour supply, and emergency support services across Kent.



**Family-run & Customer Focused**

We take pride in delivering solutions that work for our customers, no matter how complex.



**Seamless Support Across Divisions**

Our group covers a broad range of services. Our specialist customer managers help clients navigate our expertise, ensuring they receive the best possible solutions.



**Problem-solving DNA**

We fix operational challenges so our customers can focus on what they do best.



**Sustainability & Social Responsibility**

We are committed to environmental sustainability and giving back to the communities that helped build our business.



**The Highest Standards of Health & Safety**

We operate with a safety-first mindset in everything we do.

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# Our Customers





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# Delivering Operational Efficiencies

## London Borough of Bexley

**Countrystyle Recycling and the London Borough of Bexley have continued working together to improve recycling rates within the borough. In 2018, Countrystyle was awarded a five-year, £1.7 million per year contract to manage two Reuse and Recycling Centres and the Waste Transfer Station at Thames Road. In 2021, Countrystyle were awarded a 10-year, £14 million contract for the municipal and street cleansing operations for Bexley Council.**

### The Challenge

Bexley sought an experience operator to improve recycling rates, improve service levels, and enhance site efficiency whilst providing outstanding customer experience.

### The Solution

Countrystyle introduced::

-  Process improvements, staff training, and operational efficiencies to enhance recycling performance.
-  Streamlined site workflows to improve traffic flow and waste handling.
-  Enhanced waste segregation to increase recycling rates and reduce contamination.
-  Upskilled staff to maximise resource recovery and improve public engagement.
-  Investments in technology for greater efficiency and sustainability.

### The Result

-  Record high of 99.9% on time collection rate, demonstrating a reflection of a high standard of service and resident satisfaction.
-  Improved waste segregation and recycling rates with a household waste recycling rate of 46%, above both the London and National Average.

Through its partnership with Countrystyle, Bexley continues to advance its recycling efforts—delivering environmental benefits, generating rebates for the council, and achieving meaningful savings for taxpayers.



**“Our partnership with the London Borough of Bexley continues to thrive, built on shared values and a commitment to progress. Together, we’re not only delivering exceptional service and operational excellence—we’re paving the way for even greater strides in sustainability and community impact.”**

**Matt Palin**, Director of Financial Operations  
Countrystyle Recycling



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# Building an Enduring Partnership

## DS Smith at Kemsley Mill

DS Smith is a global leader in sustainable packaging, operating Kemsley Paper Mill, the UK's largest recycled paper mill and the second largest in Europe. Countrystyle has been a trusted waste management partner for nearly 20 years, supporting DS Smith's evolving needs.

### The Challenge

DS Smith needed a long-term partner to handle complex waste streams, recover valuable materials, and move towards a circular economy while reducing landfill dependency.

### The Solution

Countrystyle introduced process improvements, staff training, and developed an integrated waste solution, ensuring maximum resource recovery and cost efficiency:

-  Innovative processing to extract metals and paper fibres from pulper ropes, repurposing 52,000 tonnes of waste annually.
-  Baling and RDF processing, supplying local Energy from Waste (EfW) plants to generate steam and power for DS Smith's operations.
-  Dedicated waste management teams, ensuring compliance and continuous efficiency improvements.

### The Result

-  100% landfill diversion, with waste repurposed or converted into energy.
-  38% cost reduction in waste processing.
-  10,000 tonnes of metal and 12,000 tonnes of paper fibre recovered annually.
-  30,000 tonnes of RDF processed, generating sustainable energy for local communities.

This 20 year partnership has set a new standard for waste management in the paper industry, with Countrystyle now delivering similar solutions for other leading manufacturers.



“Countrystyle has been a trusted waste management partner for two decades. Over the years, the collaboration between Countrystyle and FGS Industrial has ensured that every aspect of on-site waste removal, segregation, and even unique, specialised requirements are handled to the highest standard. It's truly been a pleasure to work so closely together, building a relationship founded on reliability and shared commitment.”

**James Thompson**, Head of Operations  
FGS Industrial Facilities Management

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# Leading a National Waste Solution

## The Camping and Caravanning Club

Founded in 1901, The Camping and Caravanning Club (The Club) is one of the world’s largest and oldest camping organisations, with over 600,000 members and 96 UK sites.

### The Challenge

The Club needed a fully managed national waste solution that could adapt to seasonal demand, maintain a high standard of cleanliness, and align with its sustainability commitments—all while keeping costs manageable.

### The Solution

Countrystyle delivered a seamless UK-wide waste service, managing collections efficiently while minimising environmental impact:

-  Single-point waste management across all sites, ensuring a consistent approach.
-  Flexible seasonal support, with tailored waste management plans for peak periods.
-  Cost-effective and sustainable operations, using Countrystyle’s fleet in the South East and trusted partners elsewhere to reduce transport costs and emissions.

### The Results

-  A green visitor experience, reinforcing The Club’s sustainability values.
-  Reliable, cost-effective waste management, ensuring smooth site operations.
-  Lower emissions and transport costs, thanks to an optimised logistics strategy.

Countrystyle’s national waste management expertise ensures The Club delivers an environmentally responsible and efficient waste solution for its members, year-round.



Our relationship with The Club has been built over many years of trust and collaboration. We take genuine pride in the service we provide and in the dedication of our team and partners, who consistently uphold the values of safety and responsibility. Every day, we strive to learn, adapt, and enhance the experience for our customers, always listening and responding to their feedback.”

**Becky Butcher**, Commercial Director  
Countrystyle Recycling

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# Circularity

**We are committed to keeping waste out of landfills through circular systems, delivering innovative, closed-loop solutions that regenerate new value from existing resources.**

Through strategic partnerships and advanced recovery technologies, we transform diverse waste streams into renewable energy, recycled materials, and agricultural inputs. Our integrated approach ensures full traceability, compliance, and zero-to-landfill performance, supporting clients' sustainability goals while actively contributing to the circular economy.



**Closing the Loop on Plasterboard**



**Transforming Coffee Waste into Resources**



**Improving Our Soil**



**Turning Waste into Power**



**Raising a Glass to Recycling**



**Turning Food Waste into Fuel**

# Closing the Loop on Plasterboard

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At Countrystyle, we operate one of the UK's largest plasterboard recycling facilities, processing 120,000 tonnes per year. We collaborate with other businesses to implement a circular economy strategy that maintains the use of materials.

## How it works

### Collection & Processing

Specialist containers are provided for loading before plasterboard waste arrived at our bespoke facility, where it is carefully broken down and sorted.

### Material Separation

Metals are removed, leaving gypsum powder and paper.

### Gypsum Recycling

The recovered gypsum powder is supplied directly to plasterboard manufacturers to enable it to be repurposed into new plasterboard.

### Paper Repurposing

The removed paper is carefully sorted, and this enables it to be reused as recycled paper, further closing the loop on recycling.

## Positive impact



100% of materials processed are repurposed, preventing waste from going to landfill.



Supports a fully circular economy, reducing reliance on virgin gypsum.



PAS 109-compliant, ensuring high-quality recycled gypsum for manufacturing.



## Partnering with Sustainable Businesses

Our multi-million-pound investment in plasterboard recycling was driven by Knauf's commitment to increasing recycled content in their products. Alongside Knauf, we accept plasterboard waste from third-party suppliers, ensuring sustainable waste management across the industry.

At Countrystyle, we don't just recycle plasterboard—we give it a new life, over and over again.

HEATHCOTE HOLDINGS

SUSTAINABILITY & CSR

WASTE MANAGEMENT

# Transforming Coffee Waste into Resources

Each year, the UK produces over 500,000 tonnes of coffee waste, much of which ends up in landfill, emitting harmful methane. Instead of treating this as waste, we see it as a valuable resource—one that can be repurposed to support sustainable industries, reduce emissions, and promote a circular economy.

## How it works

### Collection

Waste coffee grounds are collected from cafés, roasters, retail centres, and businesses across the UK by Countrystyle Recycling.

### Purification

At Envar, the coffee grounds undergo a rigorous cleaning process to remove impurities and non-organic materials, ensuring only pure organic material moves forward.

### Transformation into Sustainable Products

 Processed into low-carbon fuel alternatives, reducing reliance on fossil fuels.

 Innovative circular solutions used in composting and agriculture projects.

## Positive impact

 8,000 tonnes of coffee waste currently recycled, preventing 8.7k tonnes of CO<sub>2</sub> emissions.

 Goal: 16,000 tonnes recycled next year, equivalent to 168 million more cups of coffee's worth of energy.

 Converting waste into valuable products instead of landfill disposal.



## Partnering with Sustainable Businesses

Envar has partnered with Green Olive to begin developing a soil-enhancing compost and nutrient-rich soil pellets produced from recycled coffee grounds. This collaboration allows for the exploration and effective utilisation of the agricultural advantages present in recycled coffee grounds.

This work between Envar, and Green Olive reflects an approach focused on sustainability and circular economy practices.

# Improving Our Soil

HEATHCOTE HOLDINGS

SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

We manage over 1.7 million tonnes of waste annually, ensuring materials are repurposed efficiently. Through our specialist composting division, Envar, we process food and green waste into high-quality PAS 100-certified compost.

## How it works

Across Envars 8 sites, we are able to process 550,000 tonnes per year using two advanced composting methods:

### Open Windrow Composting

Green waste is naturally composted in long rows, turned regularly to optimise aeration.

### In-Vessel Composting (IVC)

Food and green waste are shredded, blended, and carefully monitored in a controlled environment to accelerate decomposition.

After 6-8 weeks, the material is screened into a nutrient-rich, peat-free compost, ready for reuse in composting and agriculture.

## Positive impact

By diverting organic waste from landfill, we reduce methane emissions, support soil health, and contribute to sustainable farming practices. The resulting compost enhances soil fertility, water retention, and carbon sequestration, making it a vital tool for landowners, councils, and agricultural businesses.



## Partnering with Sustainable Businesses

We work with local authorities such as Suffolk County Council, West London Waste Authority, Essex County Council, and Hertfordshire County Council to process green waste efficiently. Partnering with our sister company FGS Organics, we return composted material to farmland, creating a fully circular system that supports both environmental and agricultural sustainability.

At Countrystyle and Envar, we don't just manage waste—we give it a new purpose.

# Turning Waste into Power

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SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

Countrystyle successfully diverts over 180,000 tonnes of non-recyclable waste from landfill each year, supporting domestic and international Energy from Waste (EfW) as well as Energy Recovery Facilities (ERFs). Of this total, approximately 80,000 tonnes are processed at UK-based facilities, while around 100,000 tonnes are exported to Europe, where the waste contributes to combined heat and power (CHP) networks—providing both electricity and heating to local communities.

## How it works

**Shredding & Contaminant Removal**  
Ensuring only suitable material is used for energy recovery.

**Baling & Storage**  
Compacting waste for efficient transport and processing.

**Energy Recovery**  
Waste is incinerated, generating heat and steam that powers turbines for electricity production and district heating networks.

**Residual Recovery**  
Incinerator Bottom Ash (IBA) is processed to extract metals for recycling, with the remaining ash used as a sustainable aggregate replacement.

## Positive impact

By converting waste into energy, we:

-  Reduce landfill reliance, cutting greenhouse gas emissions.
-  Generate enough energy to power 160,000 homes, supporting local and national energy networks.
-  Recover valuable materials, maximising sustainability through metal extraction and aggregate production.



## Partnering with Sustainable Businesses

Countrystyle are lucky to partner with many EfW plants both close to home and round the country in order to help provide a sustainable solution to RDF waste. One local plant transforms up to 657,000 tonnes of residual waste into 74MW of electricity, enough to power 160,000 homes and businesses. It also works closely with another local business to divert steam to be used as energy, maintaining a sustainable practice. These partnerships also serve as a vital avenue to divert residual waste from landfill and process it through a more sustainable option.

HEATHCOTE HOLDINGS

SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

# Raising a Glass to Recycling

At Countrystyle, we manage the collection and recycling of over 33,000 tonnes of glass annually, with dedicated bottle bank services across east of England, alongside bespoke collection solutions across the Southeast. By removing glass from mixed recycling, we help businesses and local authorities reduce costs and improve recycling efficiencies.

## How it works

Collected glass is sent to a UK-based glass recycler, where it is:

### Decontaminated

Removing impurities to ensure high-quality recycling.

### Sorted by Colour

Separating clear, green, and brown glass.

### Crushed & Reprocessed

Supplied to bottle & jar manufacturers, creating a closed-loop system where old glass becomes new.

Glass cullet melts at a lower temperature than raw materials, requiring less energy and emitting fewer greenhouse gases, making it one of the most sustainable materials.

## Positive impact

Recycling 33,000 tonnes of glass saves:

 **1,386,000 kWh of energy** reducing environmental impact compared to virgin glass.

 **10,048 tonnes of CO2** cutting emissions & supporting carbon reduction targets.

 **38,400,000 tonnes of raw materials** conserving natural resources.

 **33,000 tonnes of landfill** minimising waste disposal costs.



## Partnering with sustainable businesses

We support Tendring District Council and Ipswich Borough Council with efficient glass collection and recycling, operating dedicated bottle bank vehicles from Lackford to maximise service reliability.

# Turning Food Waste into Fuel

At Countrystyle, we transform 70,000 tonnes of food waste annually into renewable energy and biofertiliser through Anaerobic Digestion (AD).

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SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

## How it works

This process uses microorganisms to break down organic material in an oxygen-free environment, producing:

### Biogas

Captured and converted into renewable energy, supplying power back to the national grid.

### Digestate

A nutrient-rich biofertiliser that supports sustainable agriculture.

We have exclusive access to commercial-scale AD facilities in Kent, ensuring a reliable and efficient waste-to-energy solution to supply homes across England, providing the contingency energy we will increasingly rely upon.

## Positive impact

By diverting food waste from landfill, we reduce methane emissions, generate clean energy, and return valuable nutrients to the soil. The digestate produced is a natural alternative to artificial fertilisers, improving soil health while supporting circular farming practices. Energy generated by our AD Plant is sufficient to supply 3,500 homes in Kent.



## Partnering with Sustainable Businesses

We work with Kent County Council, Port of Tilbury, and Subzero, providing sustainable food waste solutions. Partnering with our sister company FGS Organics, we distribute high-quality biofertiliser to farms, closing the loop on waste and creating a fully circular economy.

At Countrystyle, we don't just process waste—we turn it into power, growth, and sustainability.

# Innovation in Waste Management

HEATHCOTE HOLDINGS

SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

**Through investments in safety, operational efficiency, customer experience, and sustainability, Countrystyle Recycling continues to drive innovation in the waste management sector.**

The successful deployment of Samsara and ZoneSafe has significantly improved fleet safety, while the company's commitment to HVO fuel, fleet electrification trials, and carbon capture initiatives demonstrates a forward-thinking approach to environmental responsibility and regulatory compliance.

As technology evolves, Countrystyle remains dedicated to enhancing safety, sustainability, and operational excellence for the benefit of both its workforce and the communities it serves.

## Kemsley Consortium and Industrial Decarbonisation

Countrystyle is actively engaged in the Kemsley Consortium, a collaborative initiative between industry leaders such as MVV, Enfinium, DS Smith, Knauf, Mace and the University of Kent. This initiative, funded by Innovate UK and the Department for Energy, focuses on waste-to-energy solutions and industrial symbiosis. The goal is to identify cost-effective solutions to support the 2050 Green Strategy, ensuring a sustainable transition for industrial operations.

## Carbon Capture, Utilisation, and Storage

As part of the Local Industrial Decarbonisation Plan (LIDP), Countrystyle is exploring Carbon Capture, Utilisation, and Storage (CCUS) solutions. The consortium aims to reduce capital expenditure (CAPEX) by leveraging expertise from heavy industry partners, government specialists, and innovate UK initiatives.

### Key strategies under discussion include:

- ✓ Developing carbon capture and storage facilities
- ✓ Utilising existing oil and gas exploration sites for CO2 storage
- ✓ Captured carbon uses in hydrogen production
- ✓ 'Project Union' UK hydrogen infrastructure strategy and development

## Electrification of Fleet Vehicles

Countrystyle is conducting trials for electric skip and dustcart vehicles to explore their viability. Current findings indicate that range limitations and operational efficiency require further technological advancements before full deployment.

## Transition to HVO Fuel

To reduce fleet emissions, Countrystyle has initiated a trial of Hydrotreated Vegetable Oil (HVO) fuel, with a plan to transition the entire fleet and heavy machinery where feasible. This non-palm oil, hydrogenated fuel is forecast to cut CO2 emissions by 89%.

### Key benefits and compliance factors include:

- ✓ RTFO compliance (Renewable Transport Fuel Obligation) for 2025–2032
- ✓ Potential for Renewable Transport Fuel Certificates (RTFCs), creating a tradable carbon credit market
- ✓ 100% unblended, ISCC-certified fuel
- ✓ Meets EN15940 fuel standards
- ✓ GHG intensity savings exceeding 75% compared to conventional diesel (EN590)

The transition not only supports environmental goals but also provides opportunities for customers, councils, and key accounts to offset carbon emissions.

## Modernising the Customer Experience

We have invested in technologies to improve the customer experience. Our new portal enhances account management, asset tracking and emission reporting.

Continuing to invest in cyber and data security initiatives protect our customers, protects our business and, critically, ensures continuity of service.



HEATHCOTE HOLDINGS

SUSTAINABILITY &amp; CSR

WASTE MANAGEMENT

# Industry Challenges and New Legislation Will Impact Everyone

The waste management sector is undergoing unprecedented transformation as the UK government seeks to increase recycling rates and decarbonise waste processing.

Unlike previous legislation, which was often sector-specific, these upcoming changes will impact every business, from manufacturers and retail chains to waste collection companies, food processors, event organisers, and pub chains. Over the next three years, businesses must prepare for significant regulatory shifts, including:



## Simpler Recycling (2025-2027)

As of March 2025, all businesses and non-household premises with 10 or more full-time employees must separate recyclable materials—including plastic, paper, glass, metals, and food waste—from general waste. This has far-reaching implications for:

### Manufacturers & Retail Chains

Need to revise internal waste segregation processes and implement staff training.

### Food Processors & Pub Chains

Must separate food waste for proper disposal, potentially increasing waste management costs.

### Waste Collection Companies

Will need to adapt collection logistics to align with stricter waste sorting regulations.

Smaller businesses (under 10 employees) have until 2027 to comply, while Local Authorities must roll out simpler recycling for residents by 2026.



## Deposit Return Scheme (DRS) (2027)

An estimated 6.5 billion single-use drinks containers go to waste each year. The DRS will require consumers to pay a refundable deposit on drinks containers, incentivising returns to designated collection points.

### Retailers & Hospitality Businesses

Will need to install return points and manage customer participation in the scheme.

### Event Organisers

Must ensure on-site collection of containers, affecting waste planning at venues.

### Local Authorities & Waste Collectors

May see a shift in kerbside recycling patterns, altering service demand.

Several European countries report recycling rates above 90% under similar schemes. In the UK, this could reshape waste collection contracts and consumer habits.



## Extended Producer Responsibility (EPR) (2025-2026)

Since 1998, businesses have funded packaging recycling through legislation, but subsidies have failed to cover the true costs. Under EPR, businesses introducing packaging to the UK market will pay fees based on the materials they use, with funds allocated to Local Authorities for waste collection.

### Manufacturers & Retailers

Must account for higher costs associated with packaging disposal, potentially increasing product prices.

### Waste Collection Companies

Will work more closely with Local Authorities as they receive EPR funds.

### Food Processors & Consumer Brands

May need to redesign packaging to meet sustainability standards.

With Local Authority Payments (LAPs) launching in 2026, businesses must assess packaging choices now to mitigate financial impact.



## Emissions Trading Scheme (ETS) (2028)

The UK ETS, introduced in 2021, is a cap-and-trade system designed to reduce greenhouse gas emissions. Businesses subject to ETS must purchase allowances to cover emissions, with market-driven pricing incentivising decarbonisation.

### Waste Management & Thermal Treatment Facilities

From 2028, these sites can apply levies on non-biogenic waste, adding £50-£100 per tonne in disposal costs.

### Construction & Manufacturing

Higher waste disposal fees may increase project costs, requiring greater recycling efficiency.

### Retail & Hospitality

May need to rethink waste management strategies to reduce costs and emissions impact.

As businesses face increasing compliance and cost pressures, investing in waste reduction, resource recovery, and sustainable packaging will be key to staying ahead of these regulatory shifts. At Countrystyle, we support our clients in navigating these challenges, ensuring compliance, cost-efficiency, and sustainability in their waste management strategies.

FINANCIAL APPENDIX

# Financial Appendix



# Consolidated Statement of Comprehensive Income

## For the year ended 30<sup>th</sup> April 2024

## FINANCIAL APPENDIX

	2024 (£)	2023 (£)
Turnover	163,952,805	136,274,667
Cost of sales	(111,977,803)	(101,293,183)
<b>Gross Profit</b>	<b>51,975,002</b>	<b>34,981,484</b>
Administrative expenses	(34,093,914)	(25,328,630)
Other operating income	651,252	474,665
Fair value movements	4,616,268	-
<b>Operating Profit</b>	<b>23,148,608</b>	<b>10,127,519</b>
Income from participating interests	47,210	27,438
Interest receivable and similar income	304,124	344,625
Interest payable and similar expenses	(1,370,094)	(898,867)
<b>Profit Before Taxation</b>	<b>22,129,848</b>	<b>9,600,715</b>
Tax on profit	(6,015,275)	(1,420,610)
<b>Profit for the Financial Year</b>	<b>16,114,573</b>	<b>8,180,105</b>
Unrealised (deficit)/surplus 011 revaluation of tangible fixed assets	(4,560,300)	4,560,300
<b>Total Comprehensive Income for the Year</b>	<b>11,554,273</b>	<b>12,740,405</b>
<b>Profit for the Year Attributable to:</b>		
Non-controlling interests	1,360,552	134,321
Owners of the parent company	14,754,021	8,045,784
	<b>16,114,573</b>	<b>8,180,105</b>
<b>Total Comprehensive Income for the Year Attributable to:</b>		
Non-controlling interest	1,360,552	134,321
Owners of the parent company	10,193,721	12,606,084
	<b>11,554,273</b>	<b>12,740,405</b>

# Consolidated Balance Sheet

## For the year ended 30<sup>th</sup> April 2024

## APPENDIXES

	2024 (£)	2023 (£)
<b>Fixed Assets</b>		
Intangible assets	14,039,907	3,989,849
Tangible assets	97,318,205	93,306,321
Investments	1,309,879	1,272,669
Investment property	16,787,822	-
<b>Total</b>	<b>129,455,813</b>	<b>98,568,839</b>
<b>Current Assets</b>		
Fixed assets held for sale	310,025	-
Stocks	2,380,798	1,945,017
Debtors: amounts falling due after more than one year	3,625,185	5,715,043
Debtors: amounts falling due within one year	42,041,455	38,150,616
Cash at bank and in hand	12,250,169	7,417,164
<b>Total</b>	<b>60,607,632</b>	<b>53,227,840</b>
Creditors: amounts falling due within one year	(43,343,861)	(35,250,374)
<b>Net Current Assets</b>	<b>17,263,771</b>	<b>17,977,466</b>
<b>Total Assets Less Current Liabilities</b>	<b>146,719,584</b>	<b>116,546,305</b>
Creditors: amounts falling due after more than one year	(30,630,248)	(15,878,108)
<b>Provisions for Liabilities</b>		
<b>Deferred taxation</b>	<b>(11,539,404)</b>	<b>(7,819,993)</b>
<b>Capital and Reserves</b>		
Called up share capital	9,419	9,419
Revaluation reserve	-	4,560,300
Other reserves	3,674,817	50,000
Profit and loss account	99,111,482	87,982,278
<b>Equity Attributable to Owners of the Parent Company</b>	<b>102,795,718</b>	<b>92,601,997</b>
Non-controlling interests	1,754,214	246,207
<b>Total</b>	<b>104,549,932</b>	<b>92,848,204</b>

# Consolidated Statement of Cash Flows

## For the year ended 30<sup>th</sup> April 2024

## APPENDIXES

	2024 (£)	2023 (£)
<b>Cash Flows from Operating Activities</b>		
<b>Profit for the financial year</b>	<b>16,114,573</b>	<b>8,180,105</b>
<b>Adjustments for:</b>		
Amortisation of intangible assets	558,946	243,103
Depreciation of tangible assets	13,121,633	11,922,308
Loss on disposal of tangible assets	(596,918)	(811,906)
Government grants	(122,627)	(19,296)
Interest paid	1,370,094	1,711,080
Interest received	(351,334)	(1,255,721)
Taxation charge	6,015,275	1,420,610
(Increase) in stocks	(405,281)	(43,315)
(Increase) in debtors	(2,546,100)	(6,425,013)
Increase/(decrease) in creditors	3,138,814	(1,836,754)
Net fair value (gains)/losses recognised in P&L	(4,616,268)	-
Corporation tax received/(paid)	806,064	(1,394,324)
<b>Net Cash Generated from Operating Activities</b>	<b>32,486,671</b>	<b>11,690,877</b>
<b>Cash Flows from Investing Activities</b>		
Purchase of tangible fixed assets	(16,608,602)	(19,961,003)
Sale of tangible fixed assets	4,752,930	5,996,856
Purchase of investment properties	(3,953,280)	-
Government grants received	122,627	19,296
Purchase of subsidiaries (net of cash)	(15,907,789)	(3,096,914)
Interest received	304,124	1,255,721
HP interest paid	(653,384)	(501,960)
Income from investments in related companies	47,210	27,438
Fixed assets held for sale	(310,025)	-
<b>Net Cash from Investing Activities</b>	<b>(32,206,189)</b>	<b>(16,260,566)</b>

# Consolidated Statement of Cash Flows - Continued

## For the year ended 30<sup>th</sup> April 2024

## APPENDIXES

	2024 (£)	2023 (£)
<b>Cash Flows from Financing Activities</b>		
New secured loans	15,000,000	-
Repayment of loans	(917,487)	(909,754)
Repayment of/new finance leases	(8,513,280)	(1,224,812)
Interest paid	(716,710)	(1,209,120)
Distributions paid to non-controlling interests	(112,020)	-
<b>Net Cash Used in Financing Activities</b>	<b>4,740,503</b>	<b>(3,343,686)</b>
<b>Net Increase/(Decrease) in Cash and Cash Equivalents</b>	<b>5,021,185</b>	<b>(7,913,375)</b>
Cash and cash equivalents at beginning of year	7,228,984	15,142,359
<b>Cash and Cash Equivalents at the End of Year</b>	<b>12,250,169</b>	<b>7,228,984</b>
<b>Cash and Cash Equivalents at the End of Year Comprise:</b>		
Cash at bank and in hand	12,250,169	7,417,164
Bank overdrafts	-	(188,180)
<b>Total</b>	<b>12,250,169</b>	<b>7,228,984</b>

# Annual Report

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