



Market Report

A Snapshot of your Marketing Sector

Zero Waste and Refill Shops

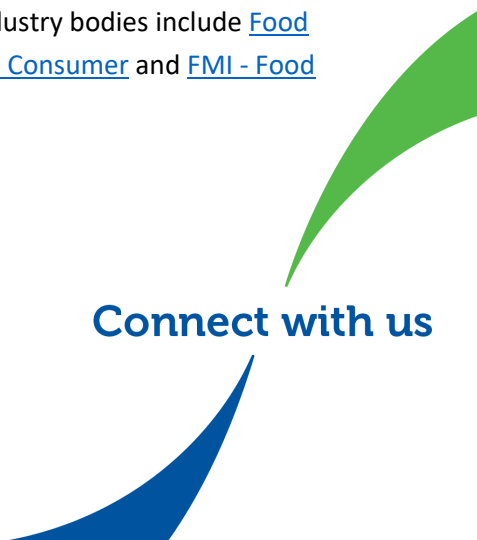
This pack has been designed to provide information on setting up a business in the **Zero Waste and Refill Shops** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **August 2025**.

What do I need to know about the Zero Waste and Refill Shops market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ In the UK, food and drink packaging makes up the largest share of household plastic packaging waste—about 81% in 2024 (Statista, 2024). UK households generated around 2.3 million metric tons of plastic packaging waste in 2023, but just 52.5% was recycled (Statista, 2024).
- ◆ While price has been, and still is, the most prominent purchase driver for many consumers over the past 18 months, sustainability is still high up on the agenda. 82% of adults think a lot of the plastic packaging on food/drink products is unnecessary, and 68% would shun products with plastic packaging. (Mintel, Sustainability in Food, 2025).
- ◆ Demonstrating their lead in eco-consciousness, most of Gen Z (55%) makes sustainable choices for most or all of their purchases. This compares to just 13% among Baby Boomers. (Mintel, Sustainability in Food, 2025).
- ◆ When it comes to supermarkets and shops, 72% of UK consumers want to see food waste management practices, and 69% want reduced plastic usage. Bulk buying options, a core offer at zero waste and refill shops, are favoured by 47% of shoppers. Yet, sustainable/eco-friendliness as a purchase driver is still secondary to price (Statista, 2024).
- ◆ About a fifth of UK consumers have stopped buying from food and beverage brands due to unsustainable practices, showing that while adoption is not yet mainstream, a shift toward sustainability is underway (Statista, 2024).
- ◆ The **Scottish Enterprise** [Net Zero Plan 2025-26](#) and Net Zero Guides 2024 highlight how zero waste shops are part of broader circular economy strategies 4 5. Notable developments include Deposit Return Scheme (DRS) launching in 2025, expected to increase footfall to refill stations and Legislative Pressure: Bans on single-use plastics and low-emission zones are nudging consumers and businesses toward sustainable retail models.
- ◆ The national organisation for this industry is [Zero Waste Scotland](#). Other industry bodies include [Food Standards Scotland](#), [Department for Environment Food Rural Affairs](#), [Ethical Consumer](#) and [FMI - Food Industry Association](#).



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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Mintel – Sustainability in Food (2025).** The IGD released the A Net Zero Transition Plan for the UK Food System report in November 2024. This outlines a framework to help achieve the 2030 emissions targets and transition to net zero by 2050.
- ◆ **Mintel – Sustainability in Household Care (2024).** 28% of all consumers purchased refillable. 35% were Gen Z, leading the way, with only 25% of baby boomers.
- ◆ **IBISWorld - Organic Food Retailing in the UK (October 2024).** Tightening funding and order cancellations create supply concerns. According to Defra, farming household income dropped by 11%, from £20,000 to £17,800, between 2021 and 2022, in the first year of a transition to new farming subsidies following pressure from Brexit and the Ukraine war. The news comes after a hugely challenging few years for farmers, who have faced high administration costs and difficulty sourcing labour since Brexit, then spikes in energy and fertiliser costs in February 2022. A survey by Opinion Matterson on behalf of Riverford Organic Farmers conducted in September 2023 found that 29% of farmers received a cancelled order with no explanation, leading to a loss of income and food waste, while a similar proportion said retailers had failed to pay them within 30 days.
- ◆ **Mintel - Attitudes toward Food Packaging UK (2024).** The Refill Coalition multi-retailer group are planning to launch its refill trial in 2023, while Asda recently expanded the range of refill options at its trial stores. It also announced a 'refill price promise', guaranteeing that each refill product will be cheaper than its packaged alternative. This should chime as 78% of people think food refills bought loose should be cheaper than packaged items, including 83% of those interested in using food refill stations.

There are also a number of online resources you may find helpful:

- ◆ **WRAP** (The Waste and Resources Action Programme) has a robust site with resources, reports and actions to take across sectors and initiatives such as sustainability, plastic packaging and recycling (wrap.org.uk).
- ◆ **Zero Waste Europe** have produced the first ever [European study](#) on the state of play and the potential growth for the packaging free shops market.
- ◆ There are several directories to find zero waste and refill shops such as **Refill** (refill.org.uk), the **Zero Waste Directory** (zerowaste.directory) and **The Zero Waster** (thezerowaster.com).

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**

What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.



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Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.

Business to Business?

There are a range of online resources which can be used to find business, labour and employment statistics in Scotland and the UK.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please info@bgateway.com or by calling **0300 013 4753**.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) ["Find a Chartered Accountant"](#) tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk ["Licence Finder"](#) tool

Law Society of Scotland's ["Find a Solicitor"](#) tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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