



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 Plan Guide \(May 2025\)](#), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **May 2026**.

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 **2024**, **paper and cardboard** accounted for **43%** of packaging waste and **plastic** accounted for **18%**. While around **74%** of paper and cardboard packaging was recycled, only **51%** of plastic packaging was ([UK Government, UK statistics on waste, July 2025](#))
- ◆ The average Scottish household buys **130kg of single-use grocery packaging** each year, at a cost of almost **£250 - or 7% of the average annual grocery bill** ([Zero Waste Scotland, Plastic free shopping: Scotland's zero waste stores, March 22](#)).
- ◆ Almost **nine in ten (87–89%)** of respondents say they could be motivated to use in-store or online reuse models for beverage, personal-care and food/drink glass containers. However, concerns remain over price barriers, convenience and hygiene ([WRAP, Recycling tracker survey in the UK: Spring 2025, September 2025](#))
- ◆ Increased regulation around single use plastic, including levies on plastic carrier bags, is driving packaging companies to use bioplastics in their packaging. This is increasing purchase costs and impacting margins. These challenges, alongside fierce competition and volatile demand, mean that revenue is expected to drop in the coming year ([IBISWorld, Plastic packing goods manufacturing in the UK, Dec 25](#)).
- ◆ Many UK shoppers consider the environmental impact of the items they buy: **61% of UK shoppers** said they limited their use of **single-use plastic** (including buying items with less packaging) and **48%** said **better schemes to remove plastics and packaging** would encourage them to adopt more sustainable shopping behaviour. At the same time, **only 24%** said they would **pay more** for brands that produce sustainable packaging and products ([Statista, Consumer behaviour in the UK, February 2025](#)).
- ◆ With increased pressure on household budgets, price is the main consumer barrier to sustainable consumption in the UK. There is also some evidence of sustainability 'fatigue' with less enthusiasm for reducing energy consumption in 2024 compared to 2023 ([Deloitte, The sustainable consumer, 2024](#))
- ◆ As of March 2026, there were **675 refill shops** listed on Refill Now (an online tool that maps shops) ([WRAP, Recycle Now maps UK's refill destinations, March 2026](#)).



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Where can I find more information on my market?

The main UK organisations representing businesses in the zero waste and refill sector are:

- ◆ [Zero Waste Scotland](#)
- ◆ [Food Standards Scotland, Department for Environment Food Rural Affairs](#)
- ◆ [WRAP \(The Waste and Resources Action Programme\)](#)
- ◆ [Ethical Consumer](#)
- ◆ [FMI - Food Industry Association](#)
- ◆ [The Refill Coalition](#)

The [National Library of Scotland](#) provides free access to a range of [eResources for Scottish businesses](#). These include **IBISWorld** reports such as **Cardboard packaging and paper bag manufacturing in the UK (Feb 26)** and **Plastic packing goods manufacturing in the UK (Dec 25)**.

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

- ◆ [Refill locator](#) is a useful directory of zero waste or refill shops in the UK.
- ◆ Ethical Consumer provides more general listings of [ethical food shops](#), which include zero waste shops.
- ◆ [A circular economy strategy for Scotland \(Scottish Government, March 26\)](#) sets out Scotland's priorities in terms of zero waste.
- ◆ The Food Standards Agency provides guidance on [starting a food business](#) including food safety, hygiene and labelling requirements.

The Information Service provides a bespoke research service for all Scottish businesses. If you have a more detailed research enquiry that you would like to explore, please contact us on **0300 013 4753** or email info@bgateway.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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