



more pay-off, less trade-off

How data is delivering better margins for
sustainable performance in waste + recycling



executive summary

Connected data, automation, and circular practices are transforming sustainability into a powerful engine for stronger margins and long-term performance.

Operational strength wins

Connected systems cut inefficiencies, reduce errors, and boost daily performance.

Automation protects margins

AI-powered, purpose-built tools reduce risk and streamline operations.

Circularity drives value

Higher yields, lower contamination, and better material quality mean stronger revenues.

Integration powers agility

A unified data backbone helps operators scale faster and adapt sooner.

Performance sustainability is here

Every system, process, and decision now strengthens margins and builds long-term advantage.





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01

introduction



the new perspective on performance

Operators are rapidly shifting to connected platforms that boost efficiency, improve material quality, and turn sustainability into measurable financial value.

The circular economy is reshaping how we all think about growth, value, and performance.

Shifting supply chains and rising customer expectations are pushing operators to evolve faster than ever, while resource pressures, climate commitments, and new regulations are becoming catalysts for change. To move forward, operators are focusing on:

- Improving efficiency and material quality
- Reducing contamination and landfill dependency
- Strengthening resilience in volatile markets
- Protecting margins through smarter, data-driven decision-making

The role of connected platforms

The shift demands one thing: a connected platform.

To win, operators need an enterprise-wide system that integrates:

- Customer and contract management
- Operations and material flows
- Trading and inventory
- Billing, financials, and compliance

AMCS delivers that. Our purpose-built platform automates workflows, provides real-time insight, and embeds industry-specific processes that protect margins and fuel growth.

AMCS turns sustainability from aspiration into action and measurable performance.

Sustainability delivers value. The question: how fast can you capture it?





agility + diversification in a consolidating market

The industry's value shift comes during rapid consolidation and diversification, driven by mergers, acquisitions, and new business line expansion.

\$11bn

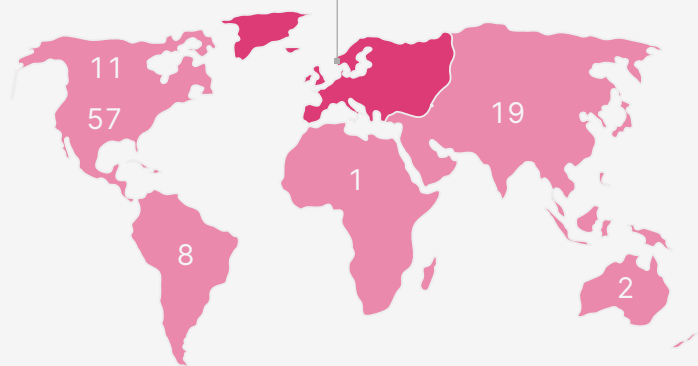
on acquisitions



- 2024: \$11bn in acquisitions in U.S.
- Biggest buy: Waste management; \$7.2bn Stericycle deal

48

transactions in Europe



- European environmental services saw a surge to 48 transactions in a single quarter.

£40bn

£30bn

2028

2027

2026

2025

- UK waste industry: £30bn today; projected £40bn by 2028
- Driver: Consolidation fuels scale and market maturity

each opportunity brings a common challenge

| Data, systems, and processes need to be
integrated fast enough to deliver synergies.

**Without a unified digital backbone,
the silos multiply, synergies stall,
and margin potential is lost.**

But with a connected platform,
integration accelerates,
diversification becomes seamless,
and sustainability data becomes
a driver of growth instead of a
reporting burden.

Business agility is as much about
adaptability as it is scale. It's about
expanding into new services,
responding to customer demand,
and meeting evolving standards.

The AMCS Platform provides
flexibility and connects the whole
enterprise so that growth adds
capability over complexity.

“

leaders are turning
sustainability into a
margin engine, and the
advantage belongs to
those who move fast.”

Jimmy Martin
CEO at AMCS Group





margins under pressure, opportunity on the rise

Operators are rapidly shifting to connected platforms that boost efficiency, improve material quality, and turn sustainability into measurable financial value.

The industry is shifting from the Reporting Era to the Results Era.

Reporting:

- Sustainability = cost center
- Compliance = box-checking
- Reports = weeks late
- Data = trapped in silos

Results:

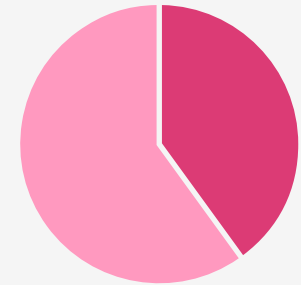
- Sustainability = performance driver
- Inefficiencies eliminated
- Material quality improved
- Transparency increased
- Safety prioritized
- Circular practices = competitive edge

Success now hinges on making sustainability and circularity profit engines. With the right mindset, model, and platform, operators can build stronger margins, greater agility, and a long-lasting performance advantage.

The cost of inefficiency:

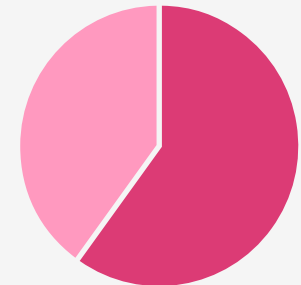
40%

of operating costs in transport-heavy businesses is fuel⁴



60%

of UK waste and recycling companies reported difficulty in recruiting for key roles⁵



a strategic blueprint for uniting data and operations

Operators are rapidly shifting to connected platforms that boost efficiency, improve material quality, and turn sustainability into measurable financial value.

Explore how the trade-off to pay-off shift is happening, what it looks like in practice, and how data, automation, and circularity intersect to create real business advantages.

By connecting operations and data, forward-thinking leaders can:

- Cut inefficiencies in time, labor, and cost
- Unlock material value via reduced contamination, improved quality, and higher resale prices
- Boost margins with efficiency and smarter asset use
- Win customers through transparency, differentiated service, and safety
- Stay competitive with modular platforms that scale and adapt





02

performance
+ technology

new mindset, new model

Operators are rapidly shifting to connected platforms that boost efficiency, improve material quality, and turn sustainability into measurable financial value.

The shift from reporting to results

The industry is moving from the Reporting Era to the Results Era. In the Reporting Era, sustainability was treated as a cost center or compliance task, with delayed reporting and data locked in disconnected systems. In the Results Era, sustainability is being redefined as a driver of performance. Eliminating inefficiencies, improving material quality, increasing transparency, and embedding safety are now central to operational success, with circular practices becoming a defining measure of competitiveness.

A new foundation for performance

Leaders now depend on a unified technology backbone that connects operations, automates processes end to end, and delivers real-time visibility across the value chain. Success relies on operationalizing sustainability as a driver of profit and circularity. With the right mindset, operating model, and platform, operators can build stronger margins, greater agility, and a lasting performance advantage.

“

It has been refreshing to work with a business that truly recognizes the need for transparency and has taken the time to understand our organization. We have valued the opportunity to draw on AMCS's deep experience in the recycling and waste sector, both in the UK and internationally.”

Large UK Resource & Waste Management Group

the leadership mindset

Future-ready leaders create advantage by unifying fragmented systems and delivering real-time, financially-relevant data insights.

The new competitive advantage is unified performance.

Leaders are future-proofing their businesses by delivering trustworthy, real-time insight from connected systems, proving that sustainability is directly linked to financial performance.

This calls for a connected infrastructure, bringing together operations, compliance, customer management, and finance.

The AMCS Platform does exactly that, using:

- Scalable, secure architecture
- AI-driven automation
- Predictive insights

This allows forward-looking operators to reinvent sustainability as a performance strategy, connecting operations and data in real time, and turning lagging reports into actionable intelligence. Sustainability and profitability have already converged, and the advantage belongs to those who digitize fastest.





the mindset shift

The shift to the Results Era rewards operators who reduce contamination, increase yield, and convert circularity into measurable profitability.

Moving from Reporting Era to Results Era creates stronger operations, faster customer growth, and reduced churn.

What defines this era:

- Circular thinking
- Automation
- Measurable outcomes

Why it matters:

Every bit of missed material value means profit lost. Reducing contamination and boosting yields (even slightly) recovers thousands of tons of saleable material annually, cutting landfill dependence and driving margin gains.

With Vision AI, contamination,

hazardous items, and overfilled containers can now be detected at the point of collection, on trucks, not just on sorting lines, which improves driver safety, reduces manual checks, and enables accurate, auditable billing.

This is the essence of the new Results Era, where businesses are capturing the full economic value of the resources already in circulation. When operators reduce contamination, increase yield, and deliver cleaner streams back into the market, they strengthen contracts, command better prices, and prove that the mindset shift isn't philosophical, it's operational. And that sustainability and profitability are not at odds, but mutually reinforceable.



contamination rates in incoming loads

15%



of recyclables received by recovery facilities is sorted and processed

87%



of recyclables received by recovery facilities could be sorted and processed with optimal conditions

95%

CASE STUDY

Real-time insight turns sustainability into a measurable advantage

A North American recycler deployed AMCS Vision AI to identify contamination and overfilled containers during collection.

The data revealed that over 20% of service stops were overfilled, which was double the previous estimates.

Integrated with their ERP, the system automatically notified customers and created verified billing.

The result:

- Safer routes
- Cleaner material
- Stronger financial performance



of service stops were overfilled, double the previous estimates

20%





4 new forces reshaping the industry

Automation, agility, capital efficiency, and customer-facing data are redefining performance and setting the pace for the industry's new standards.

These mindset and technology influences show up in four clear ways across the industry. Each one has a fundamental effect on the new foundations of sustainable performance.



01. advanced automation: purpose-built for performance

Automation, agility, capital efficiency, and customer-facing data are redefining performance and setting the pace for the industry's new standards.

Automation has long been associated with speed and efficiency.

But in waste and recycling, the next wave of automation and agentic AI goes beyond speed. It protects margins and scales profitability.

By detecting contamination at the collection source, operators not only improve resource quality, but also create an opportunity to charge back for contaminated loads. This turns a sustainability problem into a revenue protection mechanism.

Agentic AI:

- Handles routine administration
- Confirms routes
- Manages service queries
- Initiates customer communications
- Frees up teams to focus on performance and innovation
- Relieves financial and compliance processes
- Improves cashflow



CASE STUDY

The power of intelligent optimization

A large global operator implemented AMCS Optimization Services to improve route efficiency across Europe.

Each optimization delivered both sustainability and profitability gains through lower fuel use, fewer vehicle miles, and safer journeys.

Efficiencies and cost savings that translate into millions:

↑5%

up to 5% productivity increase in waste-collection operations

↑3%

up to 3% reduction in time-per-order

↓30%

reduction in transport-planning time through AI-driven routing



02. business agility: adapting at speed

Cloud-native platforms give operators the speed, stability, and integration power needed to adapt, diversify, and scale without disruption.

If automation sets the pace, agility determines how well you maintain it.

Operators are expanding into new lines of business, from municipal contracts to construction waste and material trading, and they need systems that adapt without disruption.

Cloud-based SaaS architecture gives enterprises the flexibility to scale, connect, and innovate.

- Nearly two-thirds of M&A deals fail to deliver expected synergies. This is often due to poor IT and process integration.
- One in four M&A deals results in a loss of value and negative synergy.

Enterprises with unified data backbones can consolidate performance metrics, respond to customer and investor demands instantly, and maintain credibility in a fast-moving market.

Agility also matters to investors. Time and again, we're seeing that operators who can leverage opportunities from circularity, customer transparency, and digital integration are better positioned to attract capital as well as broaden their service range.





03.

capital optimization: making every asset count

Once your business has speed and momentum, capital optimization keeps your resources working harder and smarter for longer.

Waste and recycling is a capital-intensive industry.

Trucks, facilities, sorting lines, scales, and MRF equipment represent billions in sunk cost. Yet with all those assets comes the opportunity to extract more value.

Take predictive maintenance. It uses IoT telemetry to stream live performance data from vehicles and equipment directly into AMCS Fleet Maintenance. The system automatically generates inspection and repair orders when anomalies appear. It has been shown to reduce breakdowns by up to 70% and cut maintenance costs by between 10% and 40%.

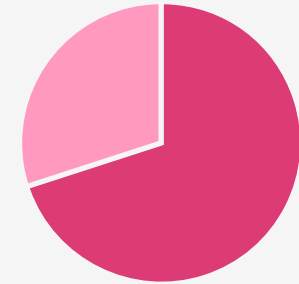
Applied to waste fleets and facilities, this means fewer unplanned outages, lower replacement costs, and longer lifecycles. In manufacturing, predictive maintenance has delivered 20% to 40% longer asset life¹, and the same logic applies here.

Capital optimization means making every asset work harder. You'll see fewer breakdowns, longer life, and stronger margins through automation linked to finance and operations.

Predictive maintenance has shown:

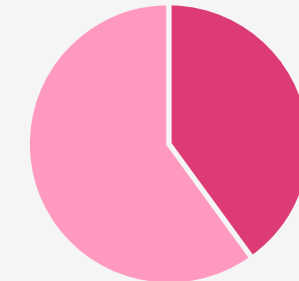
70%

up to 70% reduction
in breakdowns



40%

up to 40% reduction
in maintenance costs



04. market differentiation: data in customers' hands

Real-time data has become a competitive differentiator that wins deals, strengthens renewals, and creates new premium revenue streams.

Enterprise customers want to see:

- Real-time data
- Diversion rates
- Emissions data
- Proof of sustainable performance

We help operators give customers real-time data on collection, recycling, and emissions through digital portals, which builds trust and wins renewals.

But, leaders go a step further:

- Turning data into revenue by integrating sustainability metrics into client dashboards
- Packaging analytics and ESG insights as premium services to secure stronger contracts and higher margins





03

putting enterprise-
level strategies
into practice

3 plays

1. Customers.
2. Operators.
3. Growth.

This shift has moved beyond the theory, and it is already playing out across the waste and recycling industry.

Enterprises are proving that sustainability and profitability can work as one. They are operationalizing it, turning what was once a trade-off into a pay-off that has a positive impact on contracts, uptime, and the balance sheet.

These pay-offs aren't abstract. They're defining the future growth of this industry through customers, operations, and business expansion. Together, they form the three plays that CIOs, COOs and CFOs can use to set the pace for tomorrow.

It's defining the industry's future growth through customers, operations, and business expansion. Together, they form the three plays that leaders can use to set the pace for tomorrow.



Partnering with AMCS is critical to Reworld's mission of transforming waste into resources. Their solution provides the automation and real-time insights we need to optimize our logistics and materials management. This collaboration is essential to driving efficiency, connecting our operations, and ultimately, accelerating the transition to a true circular economy for our customers."

Reworld[™]
.....





Play 1: Customers

from transparency to monetization

Leaders are using transparency to create measurable value.

They're helping customers to:

- Cut costs
- Reduce site visit frequency
- Verify their own sustainability outcomes

And they're turning those same insights into recurring revenue streams through premium analytics and service differentiation.

We help enterprises go further by integrating sustainability data into client dashboards and packaging analytics as premium services. Transparency builds trust. Monetization secures loyalty. Making outcomes visible transforms sustainability into stronger contracts, higher retention, and more revenue.

Cutting costs + winning contracts



A rapidly growing North American hauler struggled to make its value visible across a dozen towns. The company had built a reputation on local service and a commitment to high recycling and waste reduction rates. But clients couldn't see the impact of those efforts and disputes over billing or service records created friction. AMCS introduced a customer portal with real-time data on recycling rates, emissions reductions, and service performance.

Now the operator has:

- Given customers visibility without the need for costly site visits
- Reduced their own administrative burden and expenditure
- Turned data into a sales tool, strengthening renewals and winning tenders

Play 2: Operators

from efficiency to resilience

Efficiency has long been the goal of operational excellence, but efficiency alone is no longer enough.

Today, the real differentiator is resilience, which comes from AI-powered automation and connected systems.

Resilience means building operations that anticipate market and resource volatility. Real-time inventory visibility allows operators to adjust trading strategies quickly, protecting margins from commodity-price swings. Agentic AI in back-office automation reduces dependence on scarce labor, automatically generating route confirmations, handling service queries, and maintaining cashflow continuity. At the same time, predictive maintenance cuts breakdowns by up to 70% and reduces costs by 10-40%.

In an industry shaped by labor shortages, fuel volatility, and price swings, foresight separates the leaders. And while efficiency may cut costs, resilience protects profits.

Predictive maintenance:

Cuts breakdowns by up to

↓70%

And reduces costs by up to

↓40%





Play 2: Operators

CASE STUDY

From manual burden to margin protection



A European operator faced extended order-to-cash cycles caused by disconnected workflows and legacy CRMs. By deploying the AMCS platform, we connected every stage, from order management and fulfilment to billing, payment, and collections. This replaced multiple systems with one seamless process.

Results included:

- 5% increase in total revenue through a tighter order-to-cash process, ensuring all exceptions were billed and verifiable
- 5-day reduction in DSO, improving cashflow
- Scalable processes to support higher volumes

By automating the entire financial chain, the operator accelerated revenue collection and reduced hidden margin leakage, building both efficiency and resilience.

CASE STUDY

Asset maintenance at scale



A multinational operator managed maintenance across fleets and heavy assets through worksheets, tables, and standalone apps. The resulting lack of visibility led to missed preventive work, unplanned downtime, and higher risk. With our platform integrating telematics and maintenance scheduling, the company automated work orders and gained real-time insight into asset performance.

This achieved:

- 15% increase in vehicle uptime
- 12% reduction in total maintenance cost
- Improved safety, compliance, and workforce planning

Play 3: Growth

from scale to capital efficiency

In our industry, capital defines the pace of growth, but sustainability has become the new measure of financial discipline.

Scale for its own sake no longer guarantees success, and leaders are focusing on capital efficiency. They're squeezing more value out of every truck, ton, site, and transaction.

Read on for real-world examples of how sustainability is shaping access to capital. Investors increasingly reward companies that demonstrate operational efficiency, circular-economy integration, and data transparency. These are the hallmarks of long-term value creation.

“

Collaborative partnerships like the one we have with AMCS help us enhance the technology our teams and customers depend on and advance our commitment to innovation, operational excellence, and building stronger, more sustainable communities.





Play 3: Growth

CASE STUDY

Turning inventory into agility



A large metals recycler was operating across 80 sites and 800 material categories. Its in-house inventory system lacked real-time valuation and traceability, tying up millions in working capital.

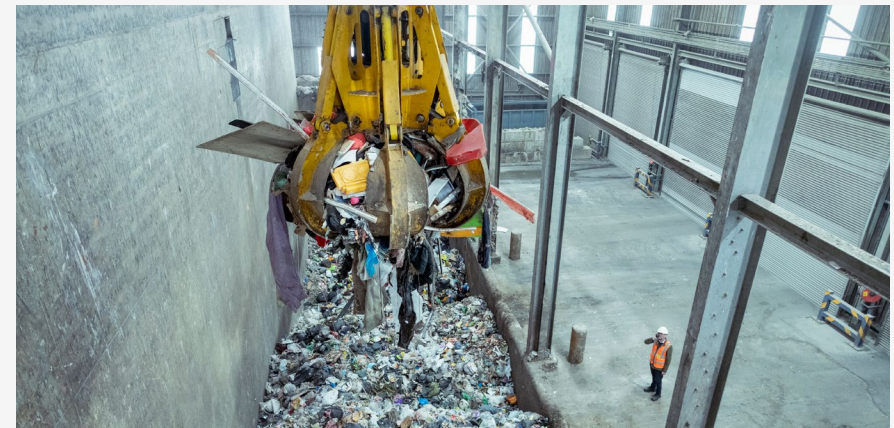
By moving to the AMCS Platform, built to manage purchase, grading, transformation, valuation, and sale, the company:

- Achieved live visibility across all inventory dimensions
- Shortened the purchase-to-sale cycle and improved trading agility
- Increased inventory turnover by 10% and freed significant capital

With accurate valuations and streamlined administration, the company reduced excess stock, optimized cashflow, and built resilience against commodity-price fluctuations.

CASE STUDY

From scale bottlenecks to seamless expansion



A UK operator identified its scale operations as a major constraint on planned expansion. It wanted to double site activity, yet manual ticketing and payment systems limited throughput. By moving to the AMCS Platform, the business was able to introduce unattended scale management, integrate digital payment systems, and deploy self-service apps on mobile tablets.

- 50% increase in scale activity with unchanged staffing levels
- 20% improvement in ticketing accuracy
- 30% reduction in payment-processing effort
- Real-time visibility into customer and load data

All these automation wins freed resources to focus on growth, not administration.



from operational proof to strategic advantage

As enterprise-level strategies become increasingly sophisticated, sustainability has been recast as a performance multiplier across operational, support, and financial systems.

Customer value, operational resilience, and capital efficiency now move in sync, powered by data and automation.





04

this is where
the pay-off lives

THIS IS WHERE THE PAY-OFF LIVES

a circular, connected, and competitive global shift

Global macro forces are elevating circularity and turning waste and recycling into a strategic engine for economic and supply-chain resilience.

Resource scarcity is now geopolitical

Critical metals and minerals have become strategic assets, driving demand for large-scale recycling and recovery. Global EPR laws make circularity a shared priority for producers, municipalities, and recyclers.

The circular economy is an economic engine

Keeping products and materials in circulation reshapes value flows and gives waste and recycling a strategic role in global resilience. This creates major opportunities for an industry built on logistics and material transformation.



turning pressure into pay-off

Leaders are already using AI-enabled digital platforms to reclaim more value from every ton processed, every transaction completed, and every customer served.

They are using sustainability as a financial strength, and turning those same pressures into performance gains.

- Lowering costs through cutting contamination and improving yield
- Extending asset lifecycles through preventive and predictive maintenance
- Building stronger customer contracts by embedding sustainability data into every interaction
- Growing faster with business models that are capital-efficient, investor-ready, and circular by design

This is about connecting fleets, facilities, materials, and data, and pointing them all in the same profitable direction. It's about making sure every decision reinforces margin strength and operational resilience.

When sustainability is embedded into the digital foundations of your enterprise, it becomes a force for competitive advantage. And the companies proving this today are already setting the pace for tomorrow.

The choice is clear: treat sustainability as a cost, or turn it into your strongest lever for profit and growth. The leaders have already chosen. The next move is yours.





05

our perspective

performance sustainability runs on AMCS

At AMCS, we know that the convergence of profit and sustainability is already here. We can see it. And we've spent decades building for it.

Purpose-built sectoral solutions like ours are proven across the world's leading waste and recycling operators, connecting every part of an enterprise so that performance, sustainability, and profitability move together.

The AMCS Platform is an enterprise-grade SaaS solution that connects and automates the entire value chain of modern waste and recycling operations. It delivers efficiency, safeguards margins, and drives sustainable growth through industry-specific automation and actionable, real-time insights.

We unite fleets, facilities, customers, partners, and compliance in one intelligent backbone, so enterprises can focus on running smarter, leaner, and more profitably.

That's why many of the world's leading operators don't just add AMCS to their stack. They build their performance around it.

AMCS Platform. Built to work the way you work.



the choice is simple: keep treating sustainability as overhead, or make it your engine for growth

**The leaders have already chosen.
And you can join them.**

Let's talk about how you can combine
performance and sustainability to build
into a lasting advantage.

GET IN TOUCH TODAY







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