Victorian Recycling Infrastructure Plan

Annual Progress Report 2024–25

RECYCLING VICTORIA

Acknowledgment

We acknowledge and respect Victorian Traditional Owners as the original custodians of Victoria's land and waters, their unique ability to care for Country and deep spiritual connection to it. We honour Elders past and present whose knowledge and wisdom has ensured the continuation of culture and traditional practices.

We are committed to genuinely partner, and meaningfully engage, with Victoria's Traditional Owners and Aboriginal communities to support the protection of Country, the maintenance of spiritual and cultural practices and their broader aspirations in the 21st century and beyond.

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Contents

Introduction

Legislative context

The *Circular Economy (Waste Reduction and Recycling) Act 2021* (CE Act) underpins Victoria's transition to a circular economy. It establishes Recycling Victoria as a statewide entity to provide strategic leadership, oversight and regulation of the waste, recycling and resource recovery sector.

The inaugural Victorian Recycling Infrastructure Plan (VRIP) was published and took effect in October 2024. The purpose of the VRIP is to guide planning and investment in waste, recycling and resource recovery over a 30-year period to support Victoria's transition to a circular economy.

The CE Act sets out that a VRIP annual progress report may include:

- progress and achievements to date in the delivery of the VRIP's directions or actions to take in relation to waste, recycling and resource recovery infrastructure
- key indicators and metrics that assess the VRIP's implementation
- any issues that have arisen in the VRIP's implementation
- any matters that the Head, Recycling Victoria considers need further consideration or action, including by a review or amendments.

Content of the progress report

This progress report provides an update on the implementation of the VRIP in the 12 months from October 2024 and October 2025. The key content is as follows:

- **Infrastructure overview**: an overview of key developments relating to Victorian recycling infrastructure since the publication of the VRIP. This includes an assessment of progress and achievements against relevant strategic directions in the inaugural VRIP.
- **VRIP actions**: an assessment of the progress and achievements against the actions for government set out in the inaugural VRIP.
- **Indicators**: the indicators we will use to track progress against the VRIP in progress reports.
- **Issues and matters for further action**: an assessment of whether any issues have arisen in the application of the VRIP that could necessitate changes. This includes an assessment of whether any issues have arisen in relation to infrastructure.

Infrastructure overview

Recycling Victoria maintains a map of all known resource recovery infrastructure in Victoria. This map is maintained based on a full annual refresh supported by monthly updates whenever new information is available. The map can be found on Recycling Victoria's website[1].

The number of infrastructure facilities based on our current data and compared to the number at the time of the inaugural VRIP publication is provided in the Indicators section. Excluding landfills and transfer stations, the number of facilities as at October 2025 is 280 compared to 281 listed in the VRIP, indicating infrastructure capacity is broadly similar to when the VRIP was published.

The inaugural VRIP identified near, medium, long term and ongoing directions, which set out the priorities for the development across material streams and infrastructure types. An overview of developments in the waste infrastructure space since the VRIP was published, with a focus on the priority areas set out in the VRIP, are outlined below.

Material streams

Organics

In the last year, organics processing facilities in Geelong and Newbridge have received approval to increase food organics garden organics (FOGO) processing capacity and a new facility was approved in Bendigo. The combined additional capacity of these facilities is over 55,000 tonne per year.

The above developments align with the VRIP ongoing direction of increased regional facilities to support regional circularity and the medium-term direction of increased sector capacity to meet projected FOGO reprocessing demand.

Paper and cardboard

There are 2 less paper collection facilities, but this is not expected to create significant changes in overall reprocessing capacity or capability.

Glass

No significant changes in capacity or capability were reported.

[1] https://www.vic.gov.au/victorias-waste-and-resource-recovery-infrastructure-map

Plastics

The landscape for plastics recycling is continuing to evolve, creating opportunities for Victoria to lead in advanced recycling. Progress includes the following:

- Feasibility work is progressing on a large-scale soft plastics-to-pyrolysis oil facility in Geelong.
- An advanced chemical recycling facility for soft plastics is also planned for Victoria, and the Environment Protection Authority Victoria (EPA) has issued a development licence for a waste plastic to oil facility.
- A soft plastic processing plant focused on post-consumer recycled (PCR) soft plastics: rLLDPE / rLDPE opened in Pakenham in September 2025.
- Australian Government co-funding of $9 million has been secured to scale a closed-loop farm plastics recycling plant targeting silage wrap. Silage wrap is an enduring recycling challenge.

The above developments align with the VRIP near term direction of new technologies to increase capability for problematic and soft plastics.

Tyres and rubber

The ability to process tyre derived pyrolysis oil in Victoria was successfully tested during the year. This test is part of groundwork that could lead to the establishment of waste tyre derived pyrolysis to oil processing in the state.

The above development aligns with the VRIP near term direction of increasing capability in the sector to respond to export restrictions and provide for higher order domestic uses.

Metals

No changes in capacity or capability were reported.

Aggregates, masonry and soils

Four more facilities were reported since the VRIP was published. There is also a proposed facility to process asphalt and crushed rock, primarily from roads undergoing resurfacing to create recycled construction materials.

The above developments align with the near term VRIP direction of increasing capacity to meeting future demand, support re-use of soils and increased diversion from landfill.

Textiles

The Seamless clothing product stewardship scheme announced that it is supporting 7 projects to support collecting, sorting, processing and recycling of clothing and textiles. Several of these projects will operate in Victoria including to establish collection points.

The above development aligns with the near term VRIP direction of improving resource recovery options from new reprocessing technologies.

E-waste and renewable energy technologies

There is evidence of increasing investment in infrastructure to match the increase in battery waste:

- A battery-in-device shredding (BIDS) plant and new discharge facility was established in Campbellfield. This facility provides safe handling of high-risk batteries with the capacity to shred devices to recover embedded batteries and aims to recover 95% of metals, plastic and valuable critical metals for further recycling[2].
- There is a proposed expansion of an e-waste recycler in Laverton North to increase capacity.

The above developments align with the VRIP near term direction of increased capability to recycle e-waste and batteries.

[2] Media Release 3 September 2025, Steve Dimopoulos MP

Recovery and transfer infrastructure

Material recovery facilities

There are 2 less material recovery facilities (MRFs) in Victoria due the closure of regional facilities. As smaller facilities, this is not projected to create immediate capacity issues.

These developments align with the ongoing VRIP direction of increased opportunities for regional facilities.

Transfer stations

The term transfer station covers a broad range of facilities. Some facilities provide a drop off service for the public. Other facilities play an important role in the aggregation of collected waste for more efficient onward transport. These facilities are expected to become increasingly important as landfills close and material is diverted to alternative destinations, as evidenced by changes to circumstances in Melbourne's south-east:

- The South-East Metropolitan Advanced Waste Processing (SEMAWP) collaborative procurement has selected Maryvale waste to energy facility as a strategic response to the landfill capacity challenge faced by that area. This means additional transfer station capacity will be needed to aggregate waste for efficient transport. Additional transfer station capacity would also support the transfer of waste to alternative landfill destinations should the Maryvale facility not be operational before the Hallam Rd landfill in Hampton Park reaches capacity (see Residual waste section below). There is a proposal for a new transfer station in the area that would provide capacity, but there would be a shortfall should that not proceed or not be delivered in time.

Residual waste

Landfills

Landfill capacity and rates of depletion remain broadly consistent with VRIP 2024 projections. As identified in the VRIP, on current trends Victoria is projected to exhaust landfill capacity by around 2040. In practice, without alternative options, the system throughput is expected to be a system constraint before overall capacity is exhausted - potentially around the mid 2030s.

- Two place-based challenges identified in the VRIP remain pressing landfill capacity issues:
    - Melbourne's south-east: All but one of the landfills in this area are projected to reach capacity within the next 10 years, including Hallam Rd landfill, which is one of the 5 largest landfills in Victoria in terms of annual throughput, and is currently projected to reach capacity by 2030.
    - Barwon South-West region: The VRIP projected that Anglesea and Geelong's main landfills are on track to reach capacity by 2029. This will result in around 100,000 tonnes per annum of material needing to be diverted to alternative destinations.
- In addition, there are landfills in Victoria subject to regulatory and compliance action by the EPA at the time of writing. This creates uncertainty over any potential impacts on the system, while underlining the importance of regulatory compliance and social licence to operate.

The issues above also underline the importance of having sufficient throughput in the system if waste currently accepted at one facility needs to be diverted elsewhere, either as landfills reach the end of their operational capacity, or for other reasons. The VRIP noted that overall system throughput is likely to be a constraint before total state capacity is exhausted.

Waste to energy

Since the VRIP was completed, there have been important developments in waste to energy:

- As noted above, the SEMAWP procurement process has concluded, with waste from the 9 participating councils to be sent to the Maryvale Energy from Waste facility for processing.
- The thermal waste to energy cap has been increased to 2.5 million tonnes and Recycling Victoria has issued 7 cap licences (noting projects will need to secure appropriate EPA and planning approvals).

These developments align with the VRIP medium term direction of increased use of waste to energy facilities to divert waste away from landfill.

The place-based landfill challenges summarised above, and the overall capacity challenges identified in the VRIP, show how waste to energy is critical to providing sufficient residual waste processing capacity to sustainably meet Victoria's future residual waste needs. This also includes facilities becoming operational in time to meet the projected landfill capacity and throughput challenges.

Hazardous waste

The landfill capacity challenges set out above also impacts the options for disposing of hazardous waste.

- There remains a single point of dependency for Category B landfill disposal (Taylors Road, Dandenong South) identified in the VRIP. The VRIP also identified a place-based challenge relating to legacy contaminated mining waste in the Bendigo area.
- One Geelong landfill has stopped accepting asbestos waste. While there are alternative destinations in western Melbourne, limited asbestos drop-off and disposal points was raised as an issue in the VRIP.

These issues underline the importance of landfills for safe disposal of contaminated waste, and Recycling Victoria is establishing a cross-government residual and hazardous waste working group.

The VRIP also identified contaminated soils and solvents as materials with limited disposal options. Developments in the reporting period include the following:

- A paint recovery facility, which also recovers solvent-based paints, to reclaim and repurpose unwanted paint and paint packaging opened in Braeside.
- A proposal has been submitted for an additional soil washing facility for western Melbourne with capability to recycle category construction and demolition soil into clean fill material.

The above developments are aligned with the VRIP ongoing direction to address waste stream needs, including soils and solvents.

One Geelong landfill has stopped accepting asbestos waste. While there are alternative destinations in western Melbourne, limited asbestos drop-off and disposal points was already raised as an issue in the VRIP.

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Summary of policy changes

Key changes in policy that are relevant to waste, recycling and resource recovery infrastructure are provided below:

Landfill levy increase took effect 1 Jul 2025 - metro municipal/industrial $167.90/t (up from $129.27); councils note the 2025–26 rate in public schedules. Expect proportional rises at rural sites.

EPA guidance and registers - landfill licensing guidance refreshed online (May 2025) and Victorian Landfill Register datasets updated (June to August 2025), improving visibility of operating/closed sites for planning and aftercare.

Amendment VC237 - introduced in April 2025, this amendment changes the Victorian Planning Provisions and all planning schemes in Victoria to reference the EPA's revised Separation Distance Guideline and Landfill Buffer Guideline and replace existing references to superseded Statewide Waste and Resource Recovery Infrastructure Plan (SWRRP) and regional implementation plans with the VRIP.

Department of Transport and Planning (DTP) Planning Practice Note 92 Managing Buffers for Land Use Compatibility - updates were made in February 2025 to provide greater specificity for decision-makers when assessing threshold distances outlined in Clause 53.10 Uses and activities with potential adverse impacts and to offer guidance in the application and implementation of the Buffer Area Overlay.

Plan for Victoria has replaced Plan Melbourne 2017-2050. The single statewide framework in Plan for Victoria provides clearer alignment of land-use priorities. This improves certainty for industry and government by embedding circular economy principles directly into the broader spatial planning agenda.

Paper and cardboard export bans - since 1 October 2024, exporting mixed or unsorted paper and cardboard waste from Australia is restricted, requiring a specific export licence, while the export of clean and sorted paper and cardboard is exempt.

Progress on actions and directions

The inaugural VRIP included actions for government. The timeframe for implementation is before the next VRIP is published in 2027. The status of the VRIP actions is presented below in Table 1.

Table 1 – Actions

	Action	Status	Progress
1.1	Continue to provide information on infrastructure sites across Victoria.	On track	Completed a full refresh of infrastructure map using sector data and Recycling Victoria surveys.
1.2	Evaluate the VRIP approach to statewide infrastructure planning to inform the next VRIP.	On track	Infrastructure planning working group established (first meeting held October 2025).
2.1	Work collaboratively to support innovation to manage problematic and emerging waste streams.	On track	Continue to meet with working group, dedicated sessions to specific problematic and emerging waste streams.
2.2	Provide regularly updated information and horizon scanning on problematic and emerging waste streams.	On track	Annual Circular Economy Market Report and Recycling Victoria Data Hub updates.
3.1	Work with the sector and across government on coordinated strategic planning for the efficient use of the residual waste system and supporting diversion from landfills.	On track	Regular working group meetings.
3.2	Establish a cross-agency working group to address specific residual and hazardous waste challenges, including: • legacy contaminated soils and other mining wastes in Loddon Mallee region • category B landfill locations • asbestos disposal locations across Victoria • monitoring the clinical and pharmaceutical waste sector.	On track	Recycling Victoria is in the process of establishing the cross agency working group to consider these issues.
4.1	Work with industry to improve data collection and the analysis provided to the market to inform infrastructure planning and decision making.	On track	Recycling Victoria is continually improving dataset collection through industry and local government surveys. The external working group (action 6.2) will provide sector insights on data and analysis to support the next VRIP.

(Table 1 continued)

	Action	Status	Achievements
5.1	Integrate waste, recycling and resource recovery infrastructure into state government planning strategies and frameworks such as Plan Melbourne, Precinct Structure Plans (PSPs) and the Victorian Planning Provisions.	On track	VRIP is now referenced in Plan for Victoria and Victorian Planning Provisions. Recycling Victoria is engaging with DTP on the 10-year Plan for Industrial Land and the 10-year Plan for Greenfields, as well as planning for certain PSPs.
5.2	Develop guidance for planners and industry relating to waste, recycling and resource recovery infrastructure.	On track	Work on the guidance will commence in 2026.
6.1	Continue to work collaboratively with other jurisdictions at system changes that will drive stronger market certainty and demand for recycled materials and recycling infrastructure (such as product stewardship and government procurement).	On track	The Victorian Government continues to engage with Australian Government programs and initiatives including Environment Minister Meetings, such as supporting battery stewardship.
6.2	Establish an Infrastructure working group, including local government and industry stakeholders and regional representation, to inform infrastructure planning.	Complete	Infrastructure working group established in May 2025 with first meeting in August 2025.
6.3	Provide and maintain guidance materials to support sector investment such as investment prospectuses.	Complete	Investment prospectus published alongside VRIP.
6.4	Working collaboratively to support the Victorian community and businesses transition to a circular economy.	On track	Sustainability Victoria has provided support for infrastructure development including the Victorian Circular Economy Recycling Modernisation Fund.

Indicators

This progress report is not an update to the VRIP. The inaugural VRIP is the key source for detailed analysis of infrastructure capacity and future demand. The VRIP can be updated if there is the need to do so due to significant changes in the sector.

Under the CE Act, VRIP progress report may include key indicators and metrics that assess the VRIP's implementation. This progress report includes total number of waste and resource recovery facilities in Victoria by material stream as an indicator.

The number of facilities listed in the table below indicates where there have been changes to the infrastructure provision in the state since the inaugural VRIP. The number of facilities is included below.

Infrastructure facilities

The table below provides a snapshot of the current facility numbers. For detailed facility data and infrastructure maps, please refer to the Recycling Victoria Data Hub.

Table 2 – Infrastructure

Infrastructure type	Total number facilities in Victoria (VRIP 2024)	Total number of facilities in Victoria (October 2025)	Change since VRIP
Organics anaerobic digestion	8	8	0
Organics reprocessing	80	79	-1
Paper and cardboard reprocessing	5	5	0
Paper and cardboard recovery	11	9	-2
Glass reprocessing	7	8	+1
Glass beneficiation	2	2	0
Construction and demolition waste recycling	49	52	+3
Tyres reprocessing	6	6	0
Textiles recycling	4	4	0
Metals recovery and reprocessing	14	17	+3
Plastics reprocessors	52	53	+1
E-waste reprocessors	26	28	+2
MRFs	12	9	-3
Waste to energy facilities (operating)[3]	1	1	0
Landfills[4]	47	47	0

[3] Only includes W2E facilities requiring approval under the Circular Economy (Waste Reduction and Recycling) Act 2021

[4] Currently accepting waste

[5] Two landfill sites appear on Victoria's waste, recycling and resource recovery infrastructure map but are not included in this analysis as they are not accepting waste.

To support the release of the inaugural VRIP, Recycling Victoria held a series of investment focused events between October and December 2024. More than 170 people attended the events, representing industry and local government. The VRIP was the most downloaded document on the Recycling Victoria website between October 2024 and February 2025, indicating the sectors engagement with the VRIP.

More broadly, the state government continues to support infrastructure development, including through Sustainability Victoria's circular economy focused support program and Invest Victoria's provision of expert guidance and tailored support to establish, grow and expand businesses in Melbourne and regional Victoria.

Issues and matters for further action

Issues

Since the VRIP was published, the number of facilities in Victoria has remained broadly stable with minor variations as set out in table 2. The Infrastructure overview section highlights any notable developments, both positive and negative. The notable issues that have arisen since the VRIP was published include:

Transfer station capacity: The strategic response to the landfill capacity challenge in south-east Melbourne is the proposed waste to energy facility in Maryvale. This requires transfer station capacity over the longer term to support the aggregation and efficient transport of large volumes of material collected in Melbourne's south-east to the proposed Maryvale facility. There is a proposal that would provide the needed capacity, but should it not proceed or not be ready before Hallam Road landfill close, there would be a capacity shortfall in the area.

Regional MRF viability: Three regional MRFs closed in the reporting period. While no immediate capacity issues have been identified, the closures are not in line with the VRIP direction of increased opportunities for regional facilities, noting that regional MRFs can support opportunities for regional circularity.

In addition to these issues, the future residual waste disposal capacity challenges that were identified in the VRIP remain a challenge for the sector. The landfill capacity challenges also impact the disposal of hazardous waste, which also faces the issues identified in the VRIP such as a single point of dependency for category B waste disposal (Taylors Road Landfill), and limited drop off points for asbestos.

Also, while there is broad community support for waste, recycling and resource recovery services, the facilities that underpin these services need to establish and maintain social licence to operate. This will continue to be a challenge across the sector and may impact ongoing capacity, expansion of capacity or the establishment of new facilities.

Further action

Both transfer stations and MRFs are considered in the VRIP under Recovery and Transfer infrastructure. The selection of waste to energy as a solution to landfill capacity challenges in Melbourne's south-east underlines both the capacity challenges facing Victoria's landfills and the important role that waste to energy can play in managing our residual waste. The landfill capacity challenges also remain with respect to mid to longer term capacity to manage and dispose hazardous waste.

To reflect the issues above, Recycling Victoria has identified the following areas as initial priorities for further detailed assessment in the next VRIP:

- recovery and transfer infrastructure needs
- capacity and throughput pressures on landfills and the timing of waste to energy facilities coming online
- reprocessing and disposal of hazardous waste.

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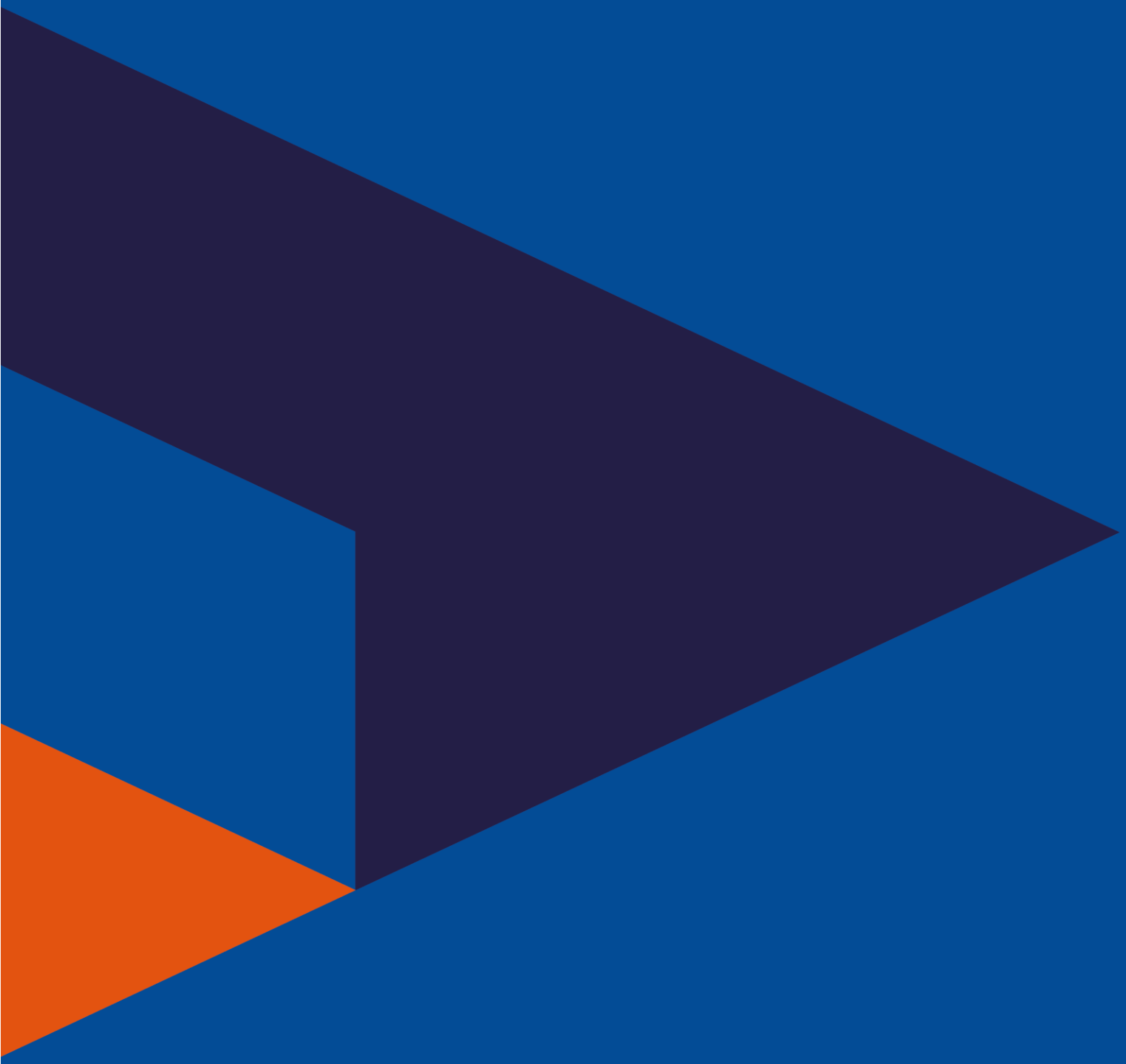

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