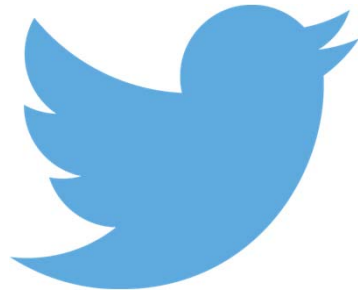




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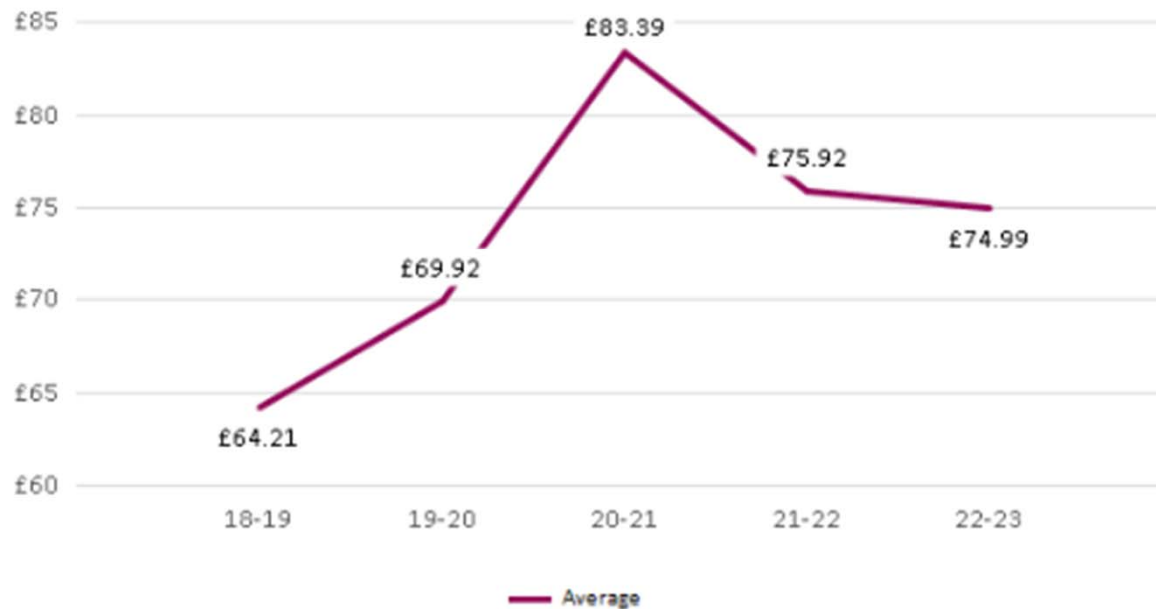


# State of the Market Surveys

- State of the Market Survey 2024
- Local authority service areas
- Similar questions are asked to allow for trend comparisons
- All APSE member authorities across the UK
- Key findings of the survey are expressed
- Used by National Government and in APSE research documents

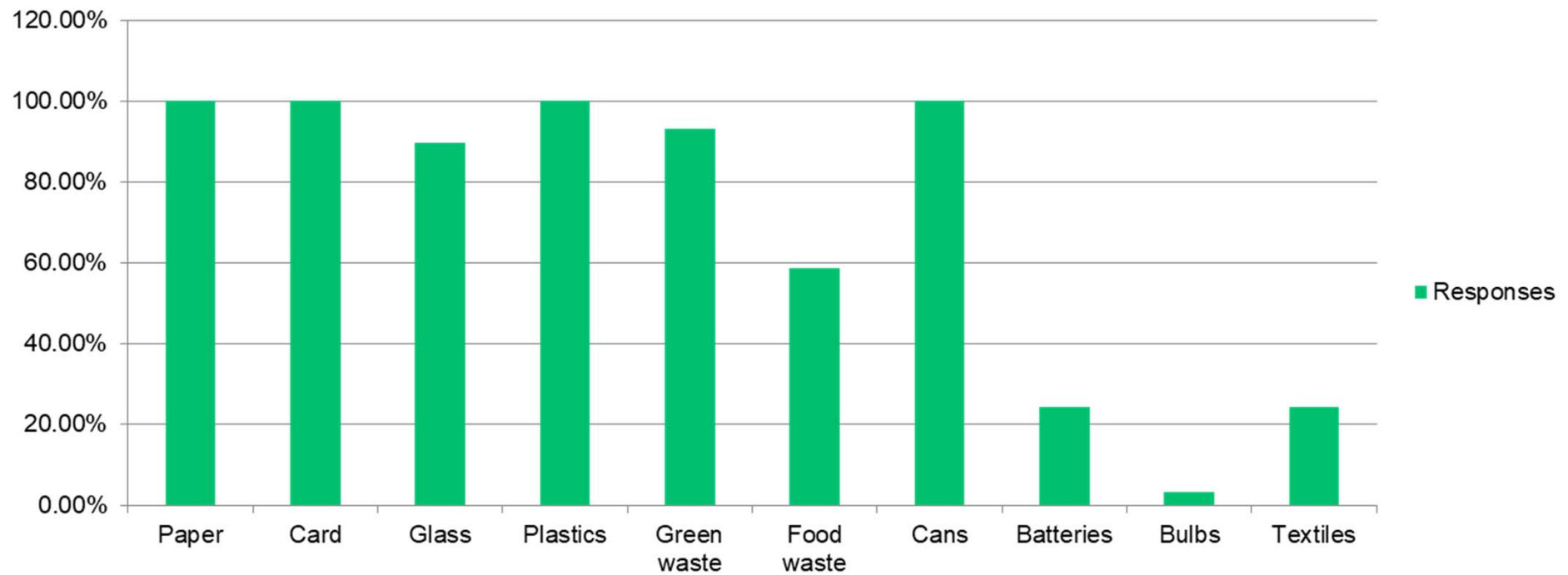
# Cost of Refuse Collection Services

PI02c Cost of refuse collection service per household (excluding landfill tax, waste disposal and CEC)



# Materials Recycled

Which of the following materials do you collect for recycling?



# Collection Frequencies

## CURRENT STATE OF PLAY

Residual collections

- 7% - 13.79% weekly
- 84% - 75.86% fortnightly
- 6% - 10.34% three weekly,
- 3% - 0% four weekly.

## CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections now the norm
- **Sight increase in numbers introduced three weekly residual collections.**
- 92.31% local authorities were looking at introducing food waste collection

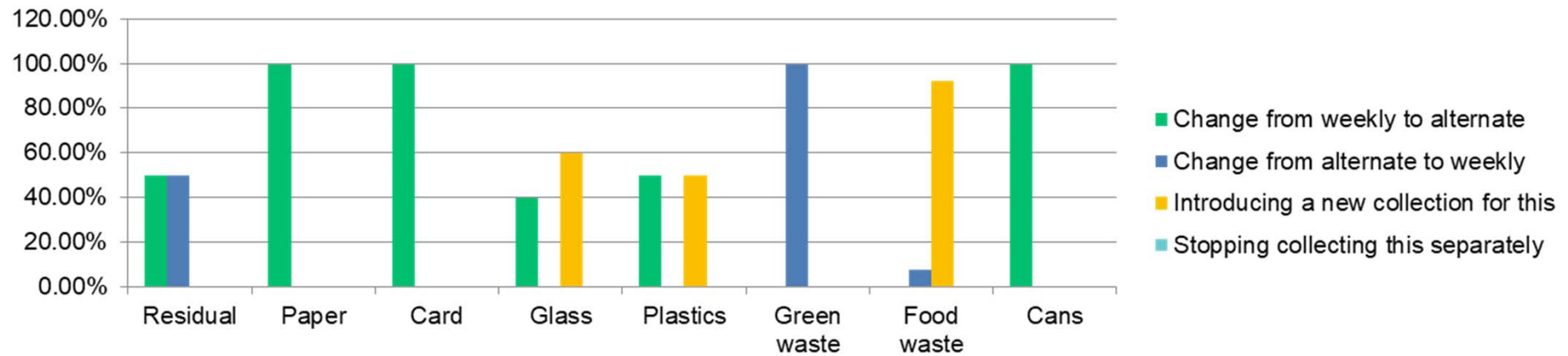


# Collection Methods

- 43% - 38.46% Operate 'task and finish'
- 12% - 0% use zonal working systems
- 52% - 57.69% use 5 day working week / 18% - 26.92% use a 4 day working week
- 70% - 60% have co-mingled collection system 17% - 20% operate source segregated collections
- 24% - 24% have a mixture of separate material collections and

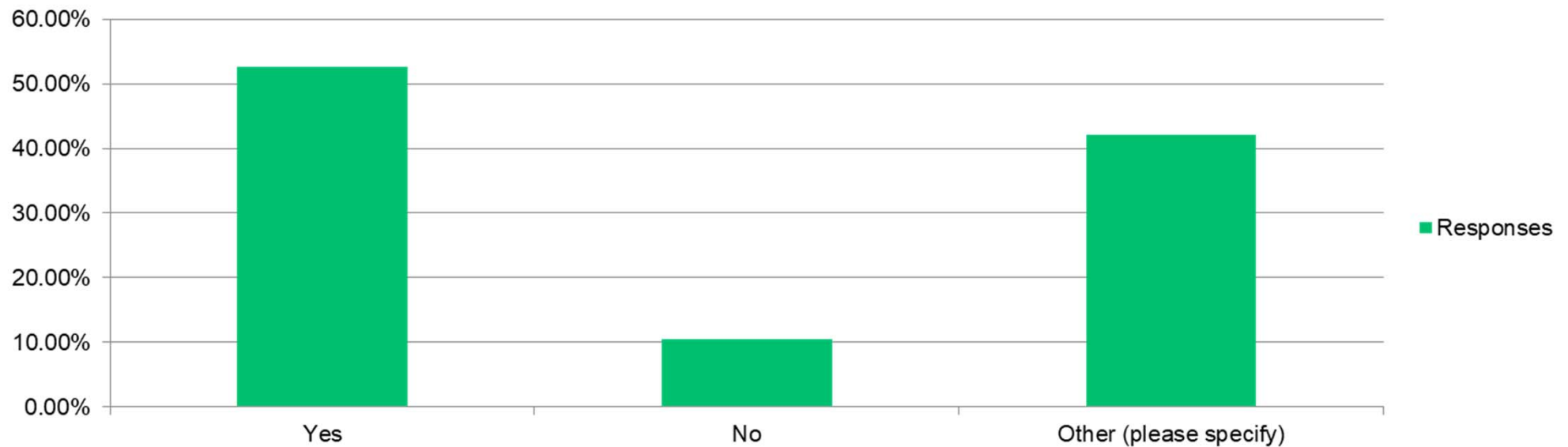


With the introduction of Simpler Recycling Collections, are there going to be any changes to your residual and recycling collections in the next 2 years?



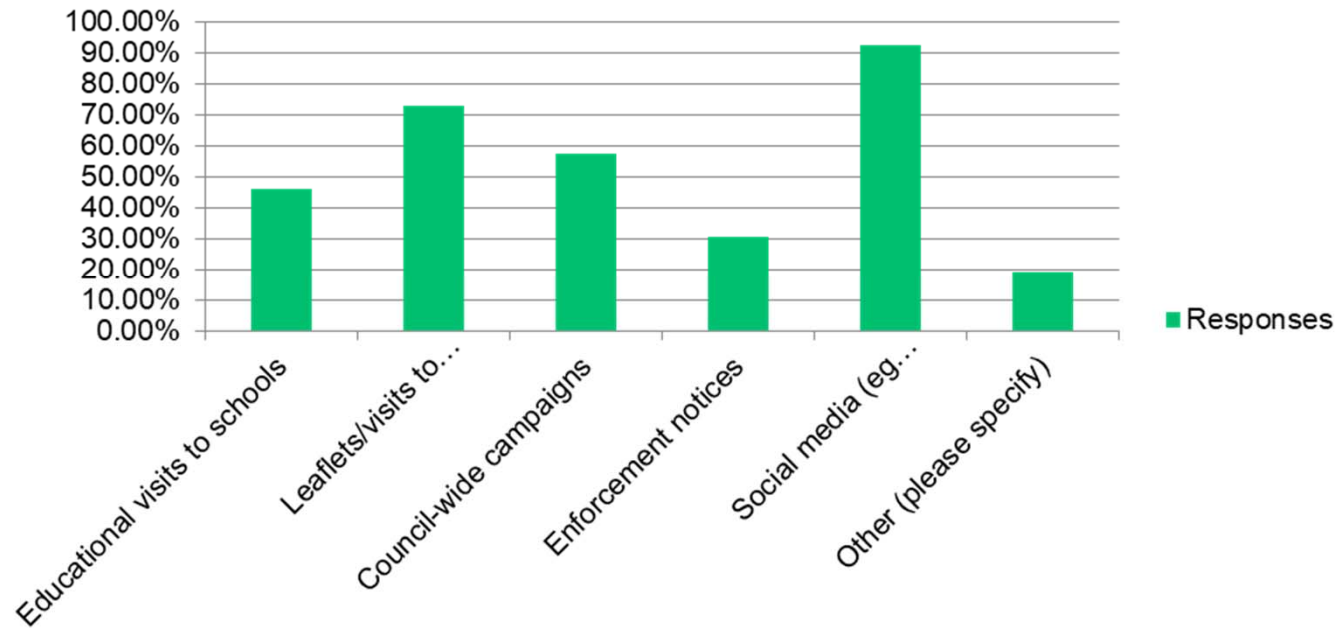


Considering the recent simpler recycling waste reforms, do you believe your council will be ready to meet the implementation date?



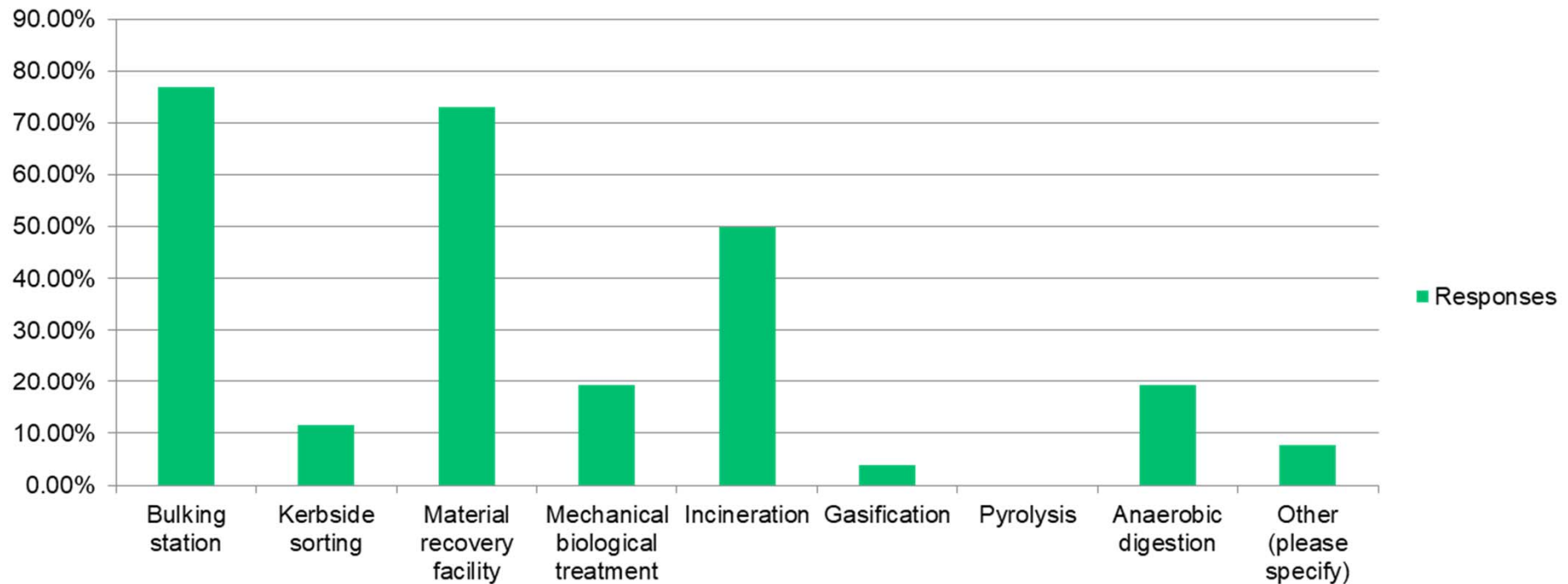
# Promoting recycling

How do you promote recycling?



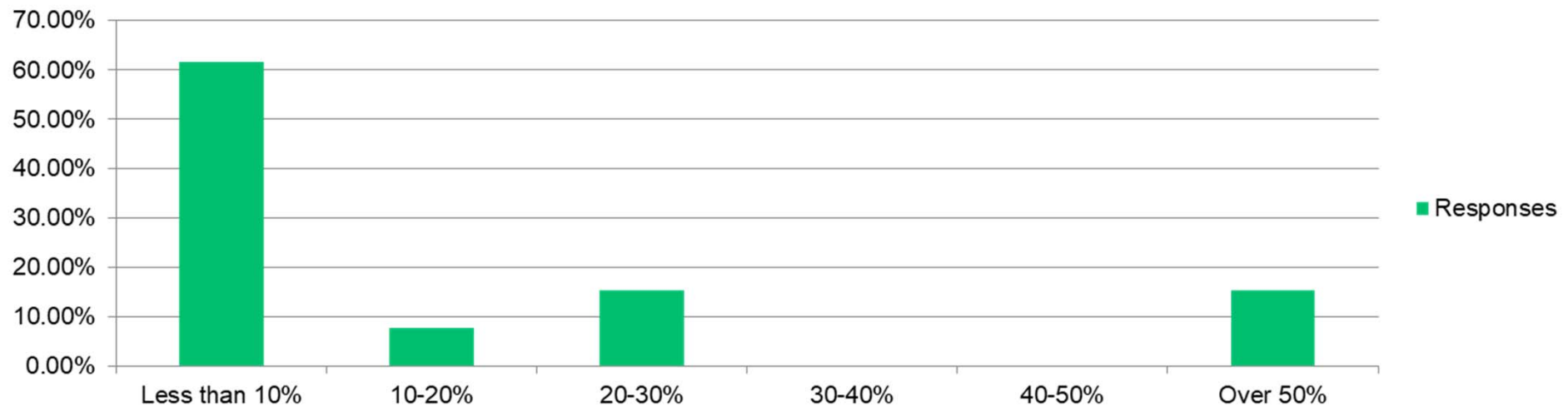
# Waste Treatment Facilities

What treatment/sorting facilities do you have/use?



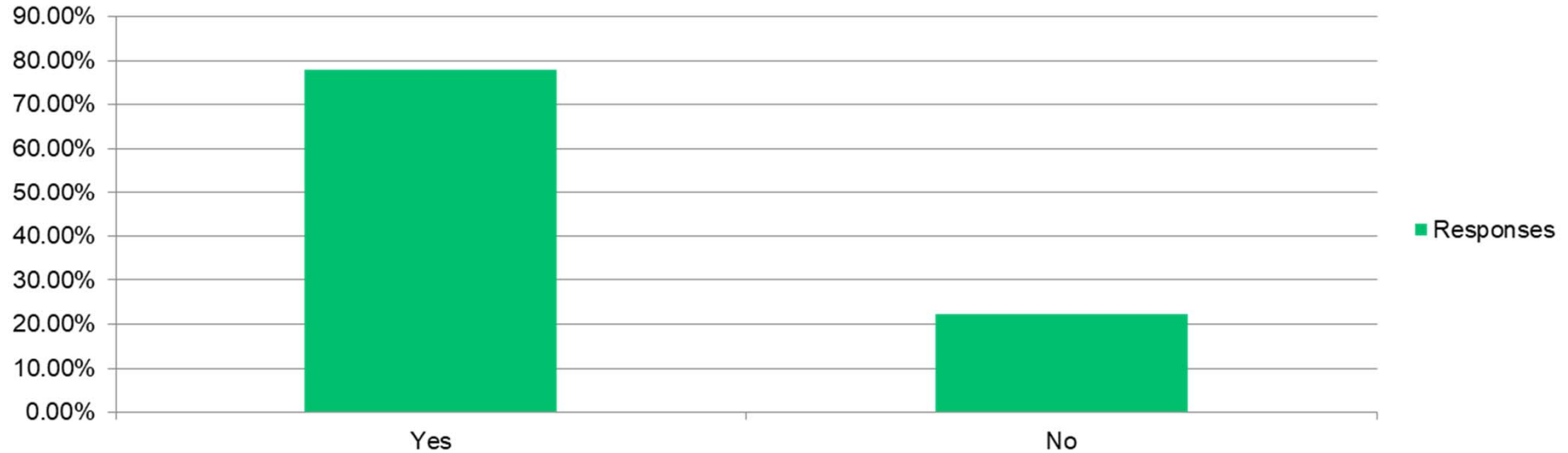
# Budget Changes

What additional capital investment has been required in the past 2 years?



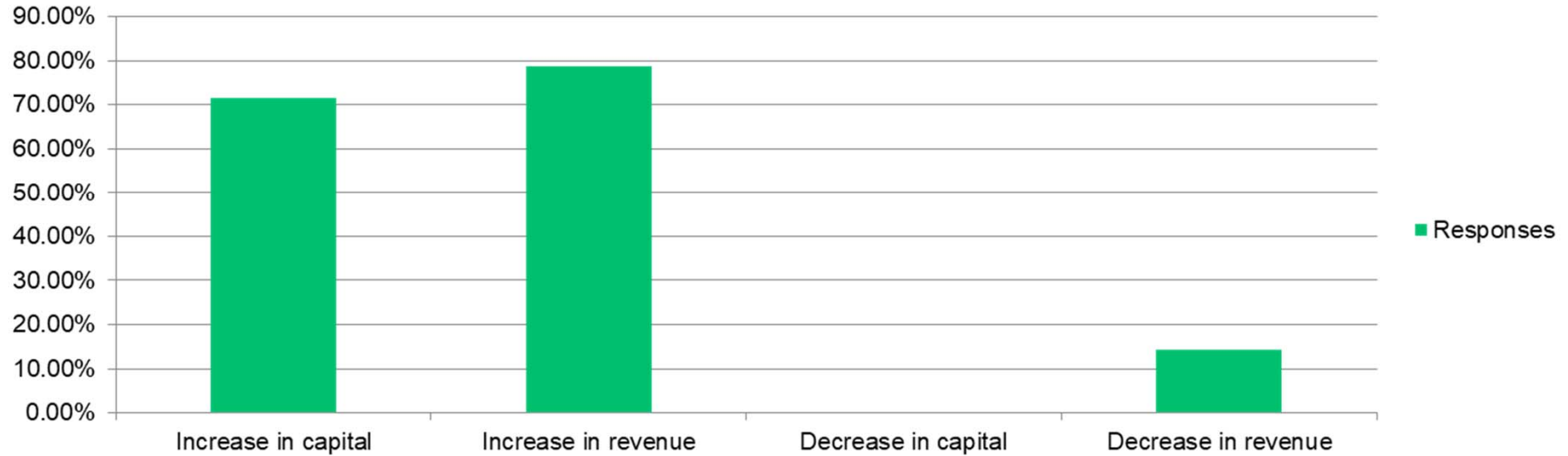
# Budget Changes

Do you expect the refuse budget to change over the next year?



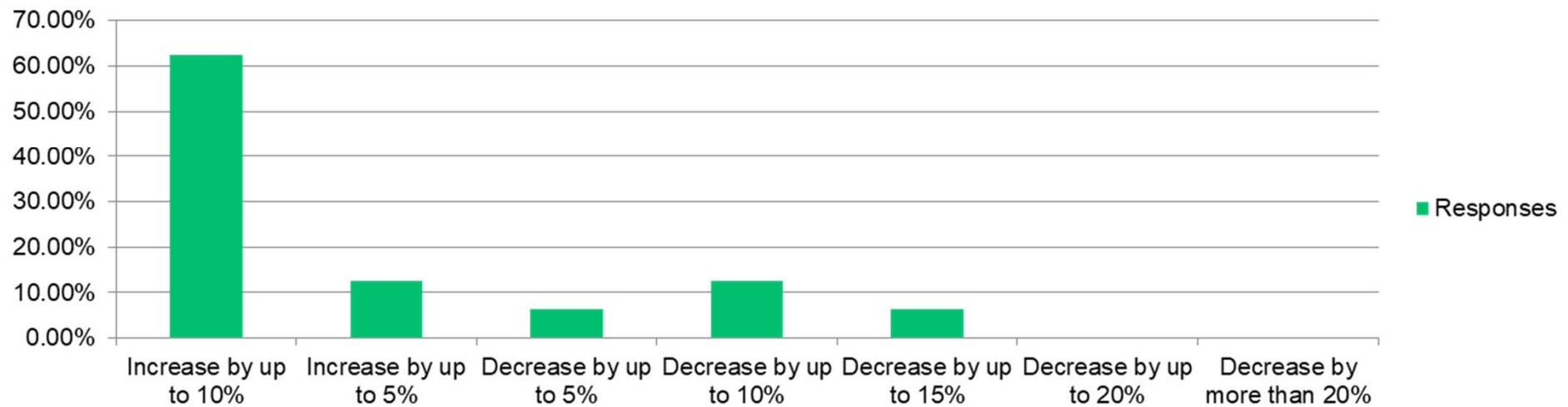
# Budget Changes

If yes, do you expect:



# Budget Changes

What is your expectation of the level of funding in your service budget in the coming five years?



# In-House vs external provision

## SERVICE PROVISION

- 54% - 72% provide services in-house.
- 29% - 22% externally provided

## CONTRACT LENGTH

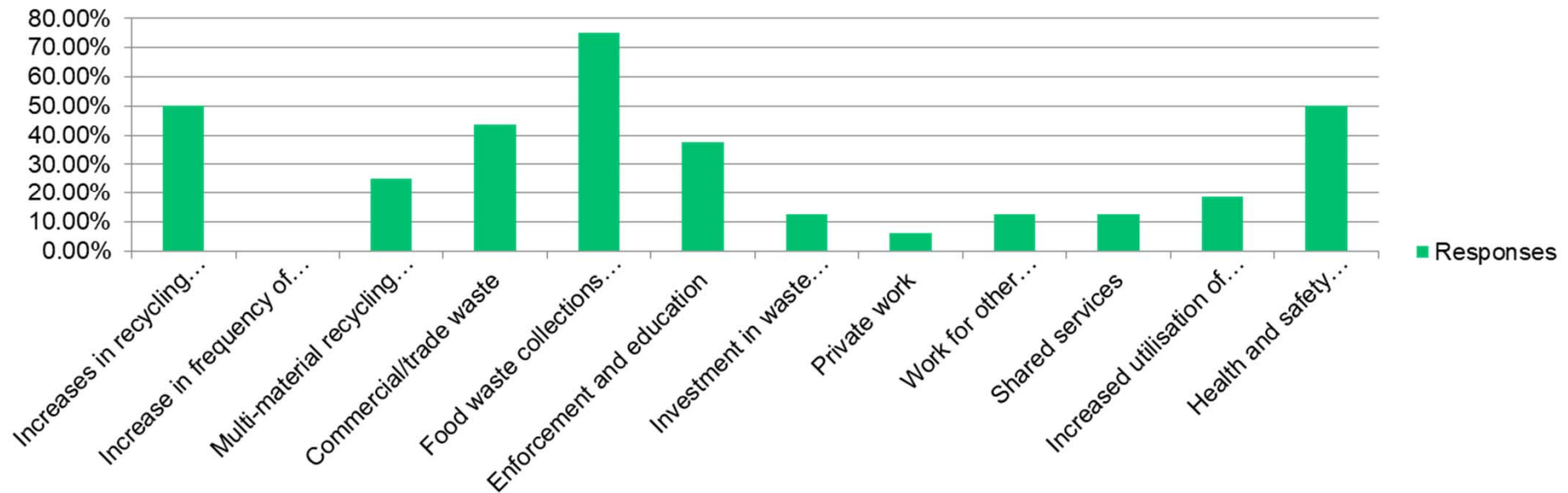
- 10+ years = 25% - 0%
- 7-10 years = 30% - 40%
- 7 - 5 years = 10% - 0%
- Up to 5 years = 15% - 60%





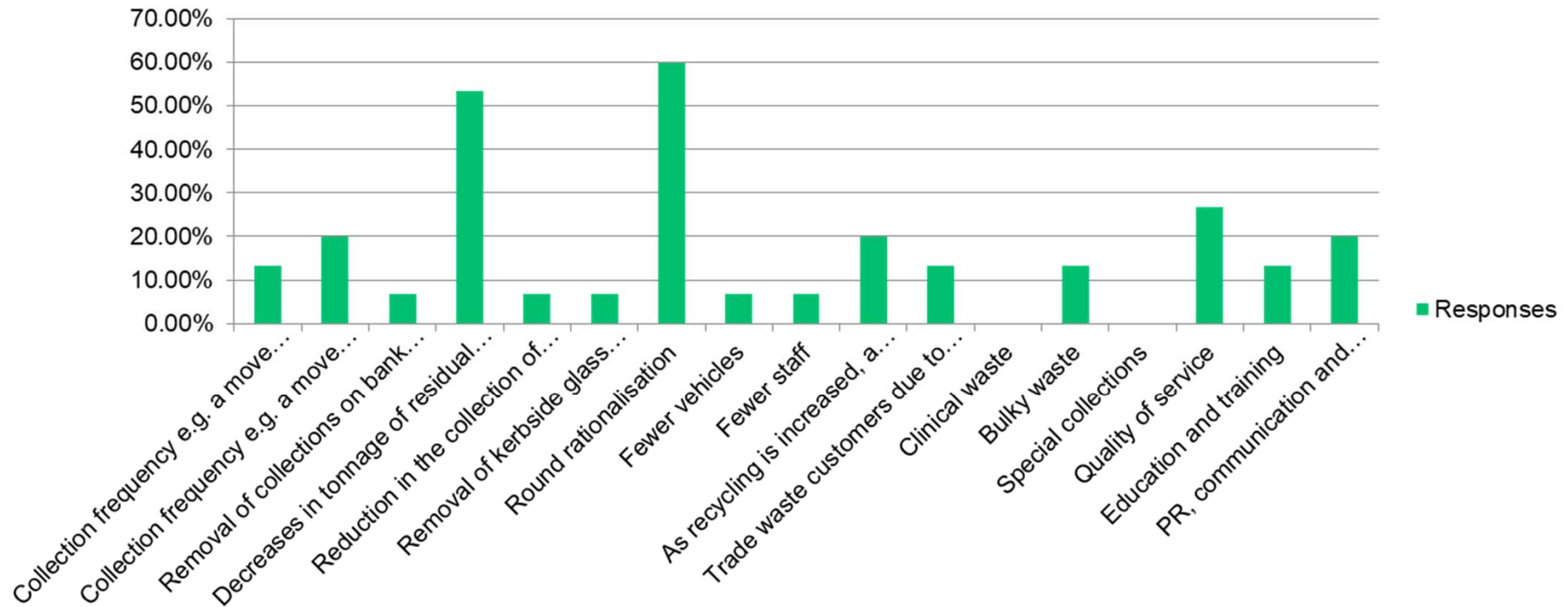
# Service growth next 12 months

Where do you see growth for the service over the next 12 months?



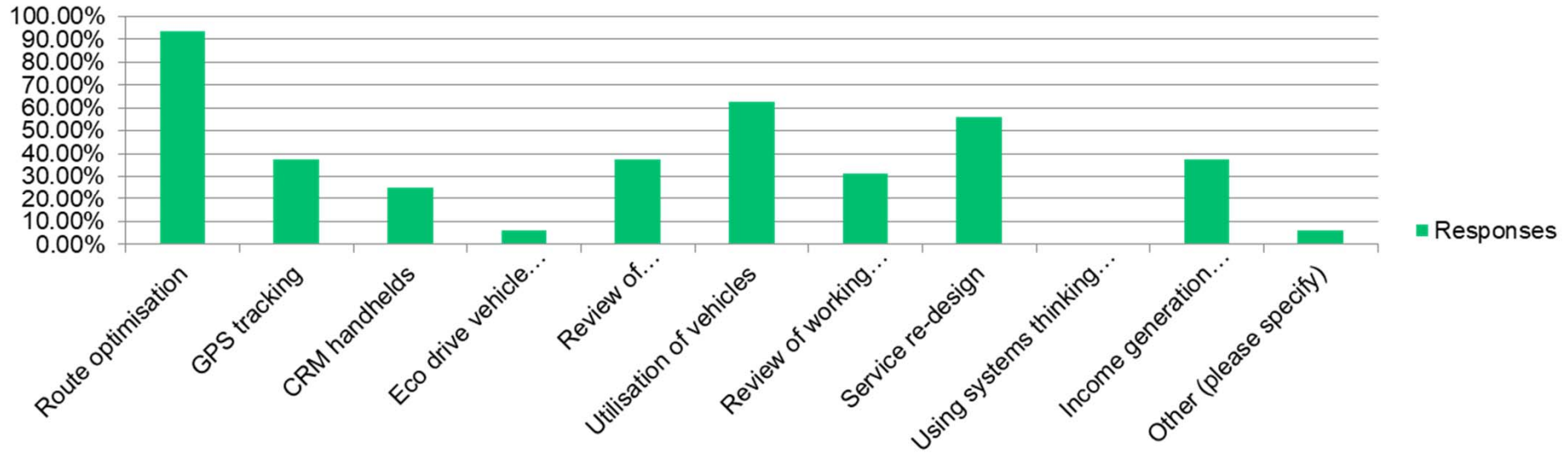
# Service decreases next 12 months

Where do you see future decreases in work for the service?



# Service Efficiencies

Will this service review involve any of the following:





# Service Reviews – Current or Proposing

**27% completed review**  
**45% review underway**  
**17% Planning a review**

Route optimisation	93.75%
GPS tracking	37.5%
CRM handhelds	25%
Eco drive vehicle monitors	6.25%
Review of productivity/work study	37.5%
Utilisation of vehicles	62.5%
Review of working time/rota's	31.25%
Service re-design	56.25%
Using systems thinking techniques	0%
Income generation capacity	37.5%
Other (please specify)	6.25%

## What impact will the introduction of food waste have on your authority?

- *Financing the changes.*
- *Issues of infrastructure that would be needed such as vehicles, containers, route frequencies and other operational practicalities.*
- *Supply chain issues, with everyone aiming to procure bins, caddies and trucks at the same time.*
- *A new burdens capital funding has been allocated to support the transition to food waste collections.*
- *Many members have said the allocated new burdens allocation funds are insufficient to meet the costs of having to introduce the new food waste service.*

# Conclusions

- Simpler recycling collections new focus of work for councils
- Most councils are working to ensure they are able to meet the deadline to roll out changes Collections. Still many concerns around.
- Food waste as new focus for many councils
- Additional funding needed in order to meet strategy requirements.
- In-House provision has risen for some reason
- Reducing service costs whilst increasing income - key objective
- Most recyclables still co-mingled.

# **NEW MUNICIPALISM**

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