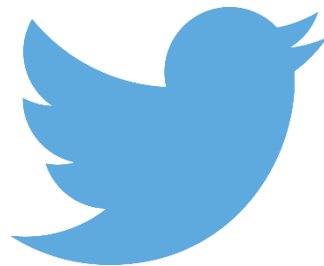


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APSE State of the Market Report 2023

Refuse Collection and Recycling



OUR WASTE,
OUR RESOURCES:
A STRATEGY FOR
ENGLAND



Household Waste
Recycling Centre



SAY NO TO
SINGLE USE

Sign the petition at [MessageInABottle.org.uk](https://www.MessageInABottle.org.uk)

Message in a
BOTTLE

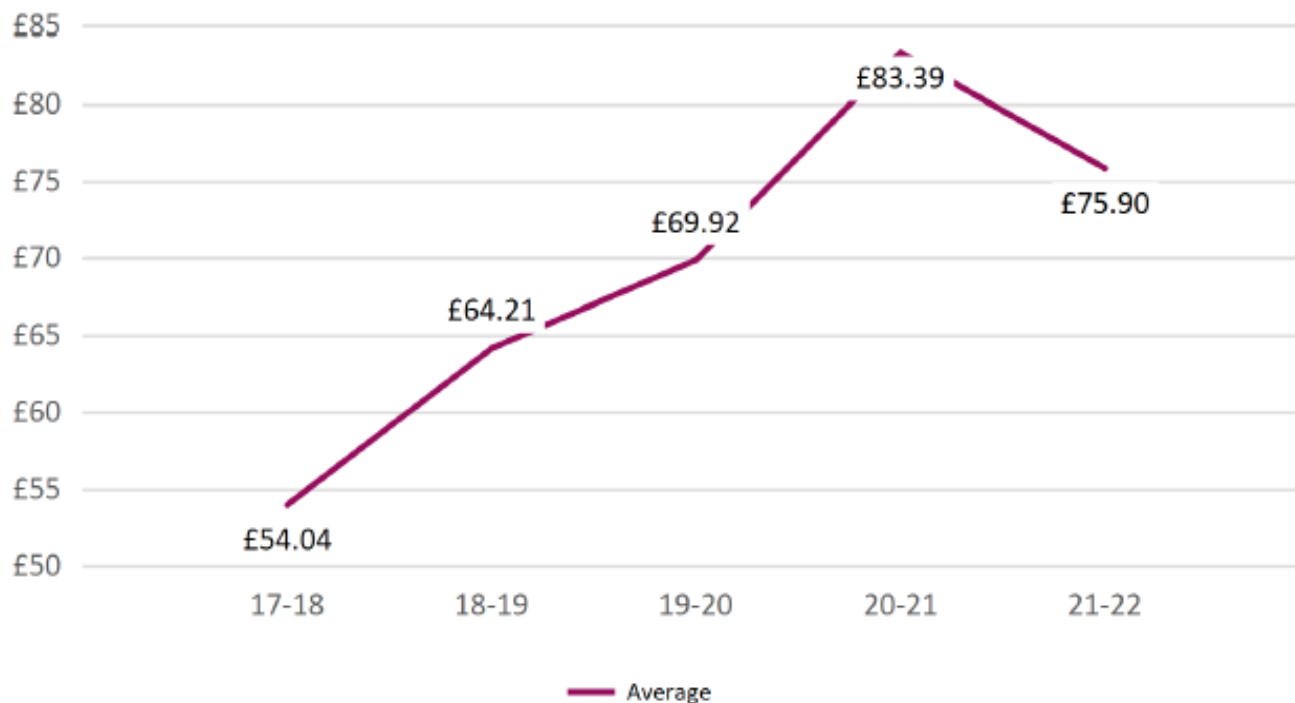


State of the Market Surveys

- State of the Market Survey 2023
- 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
- Useful for benchmarking and performance management
- Used by National Government and in APSE research documents

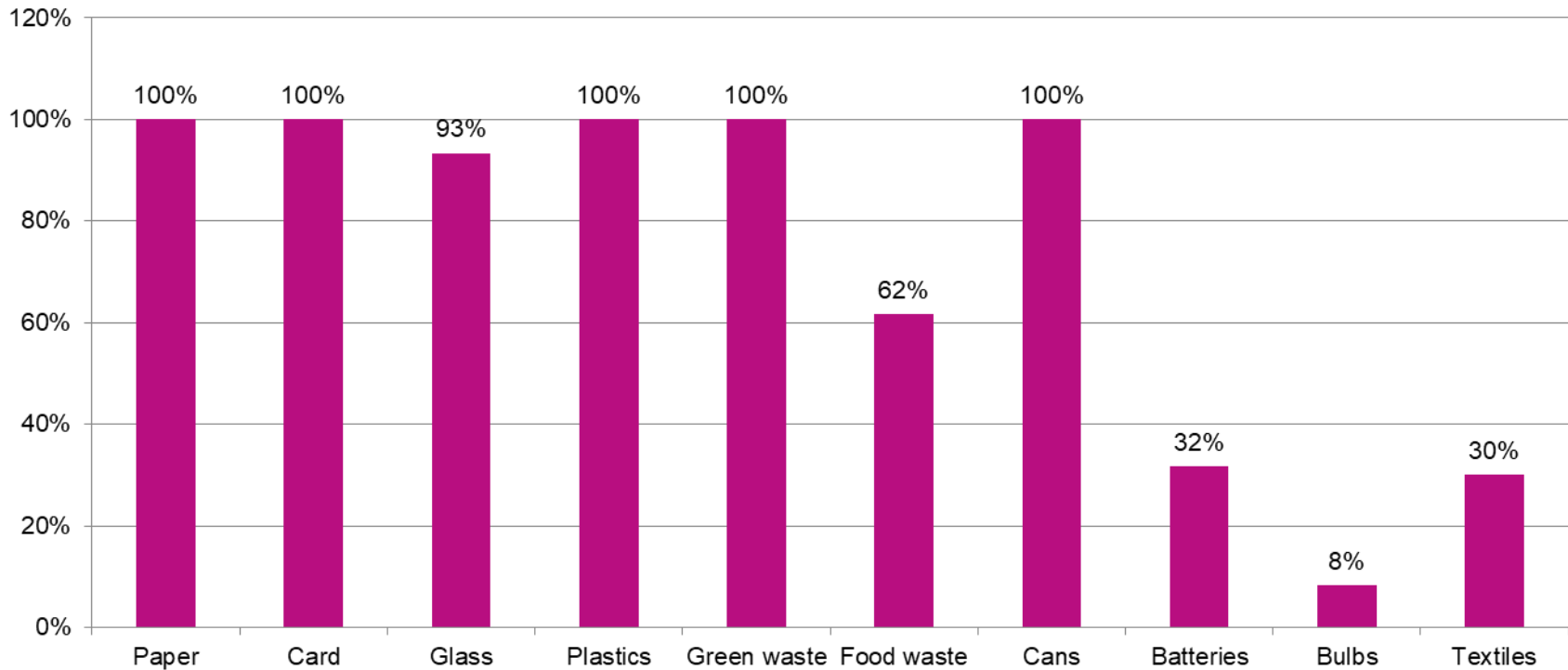
Cost of Refuse Collection Services

PI 02c 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% weekly,
- **84% fortnightly**
- 6% three weekly,
- 3% four weekly.

CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections now the norm
- growing numbers introducing three weekly residual collections.
- 11% local authorities were looking at introducing four weekly residual collections.



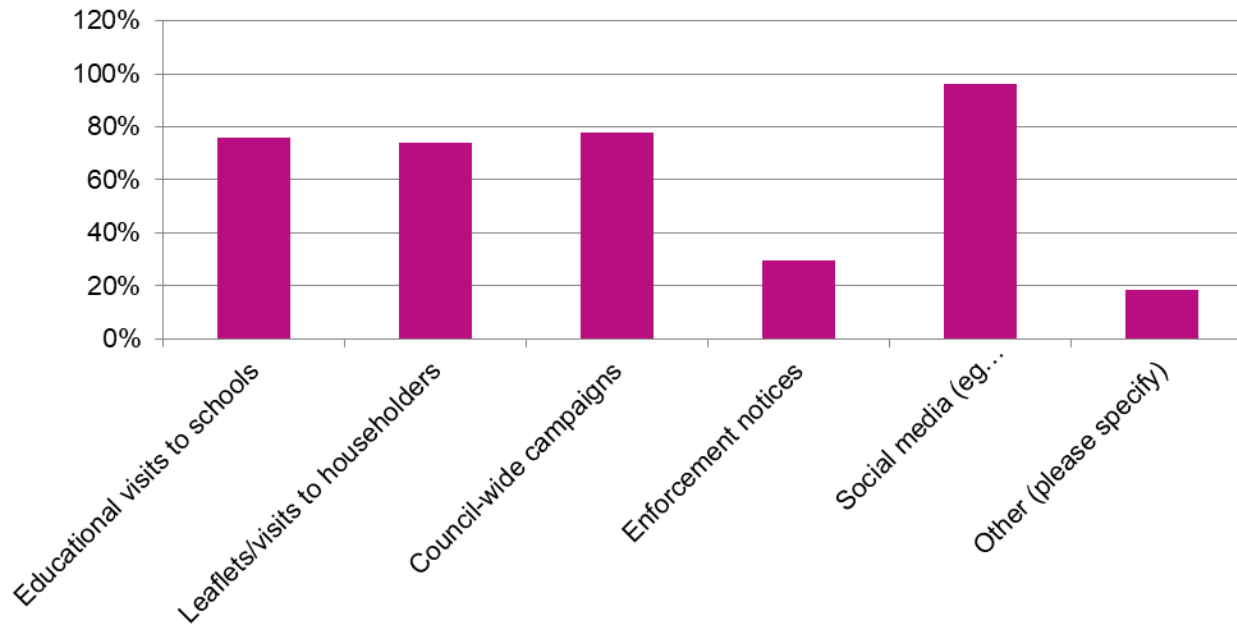
Collection Methods

- 43% Operate 'task and finish'
- 12% use zonal working systems
- 52% use 5 day working week / 18% use a 4 day working week
- 70% have co-mingled collection system (64% in 2020)
- 17% operate source segregated collections
- 24% have a mixture of separate material collections and co-mingling.



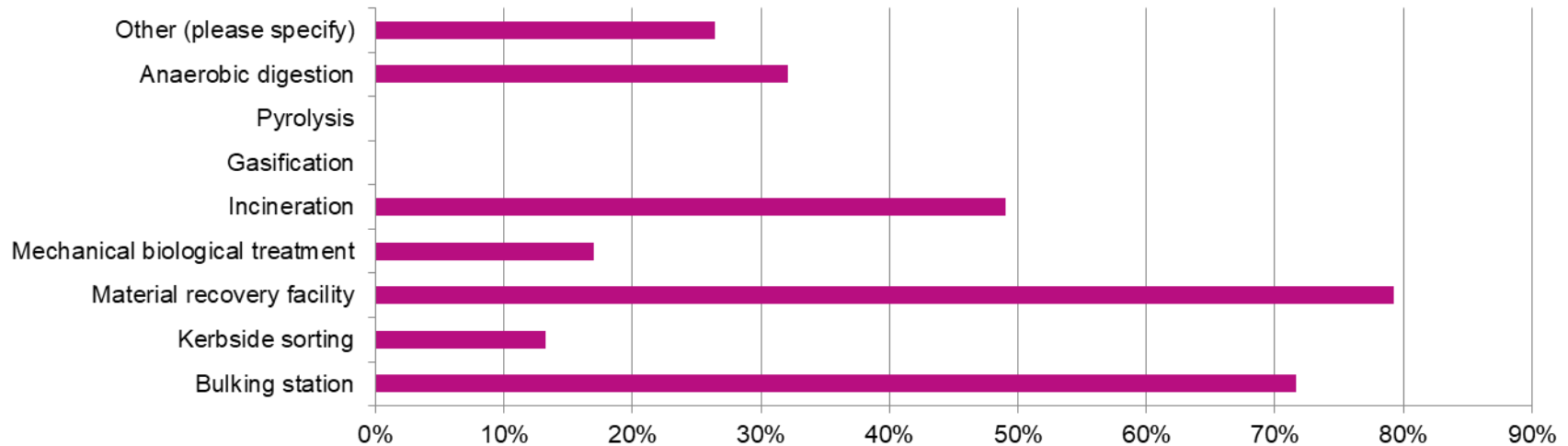
Promoting recycling

How do you promote recycling?



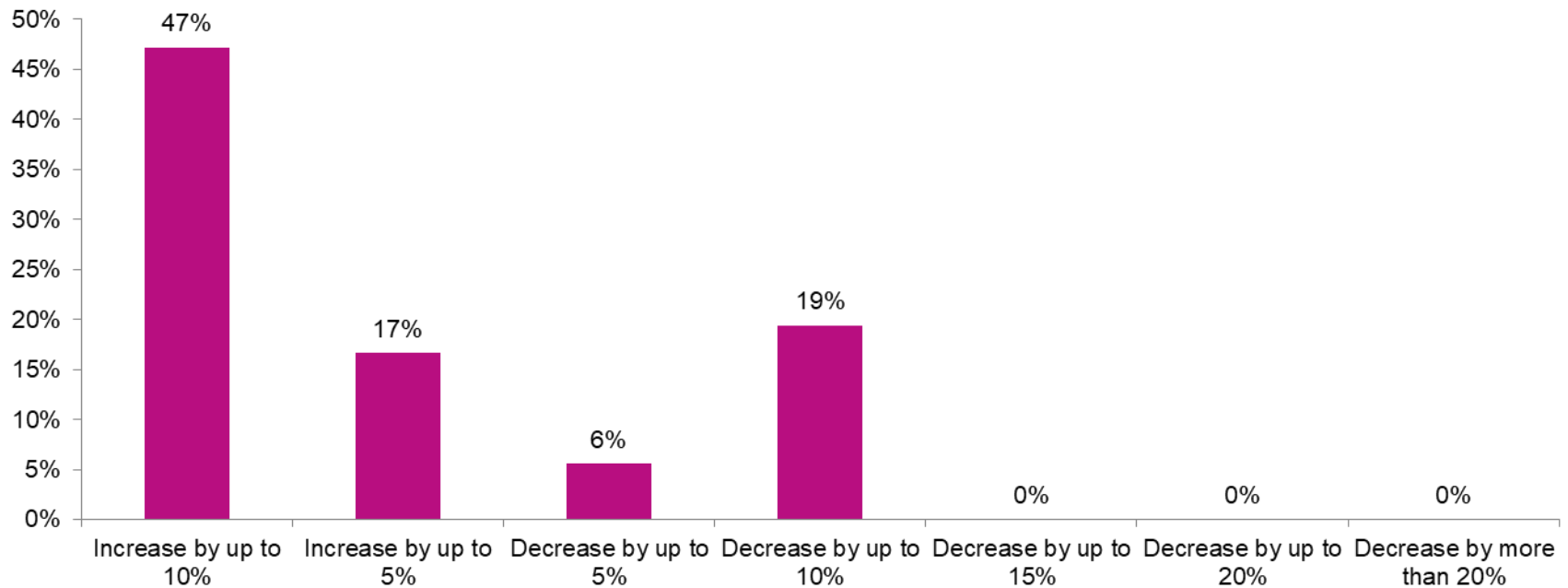
Waste Treatment Facilities

What treatment/sorting facilities do you have/use?



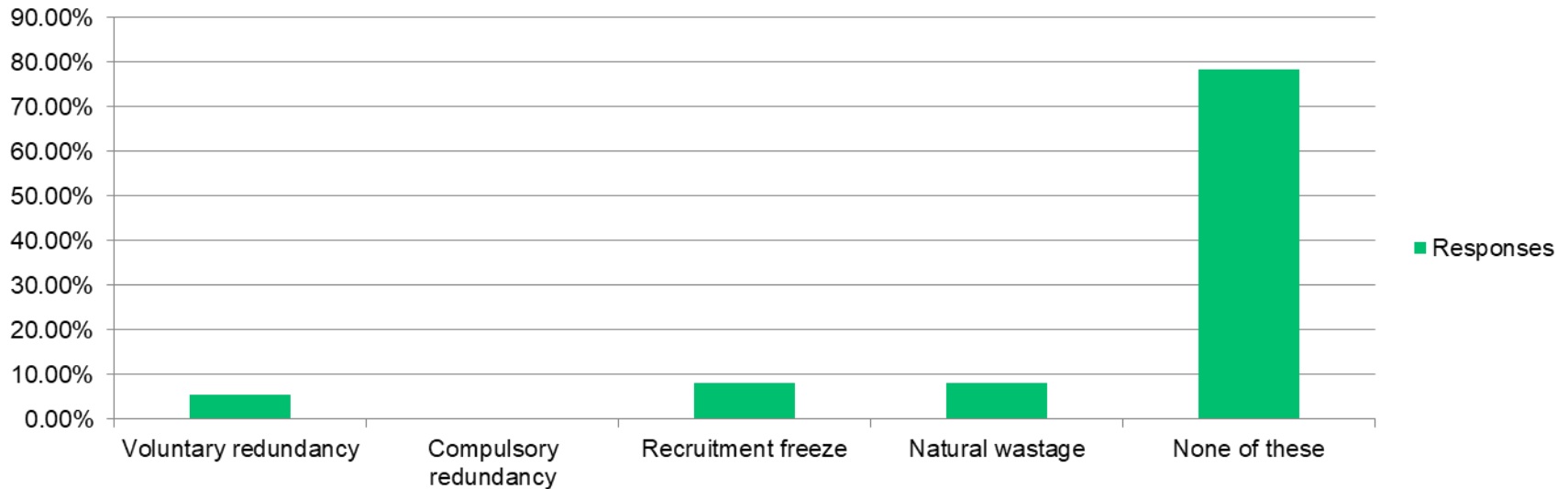
Budget Changes

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



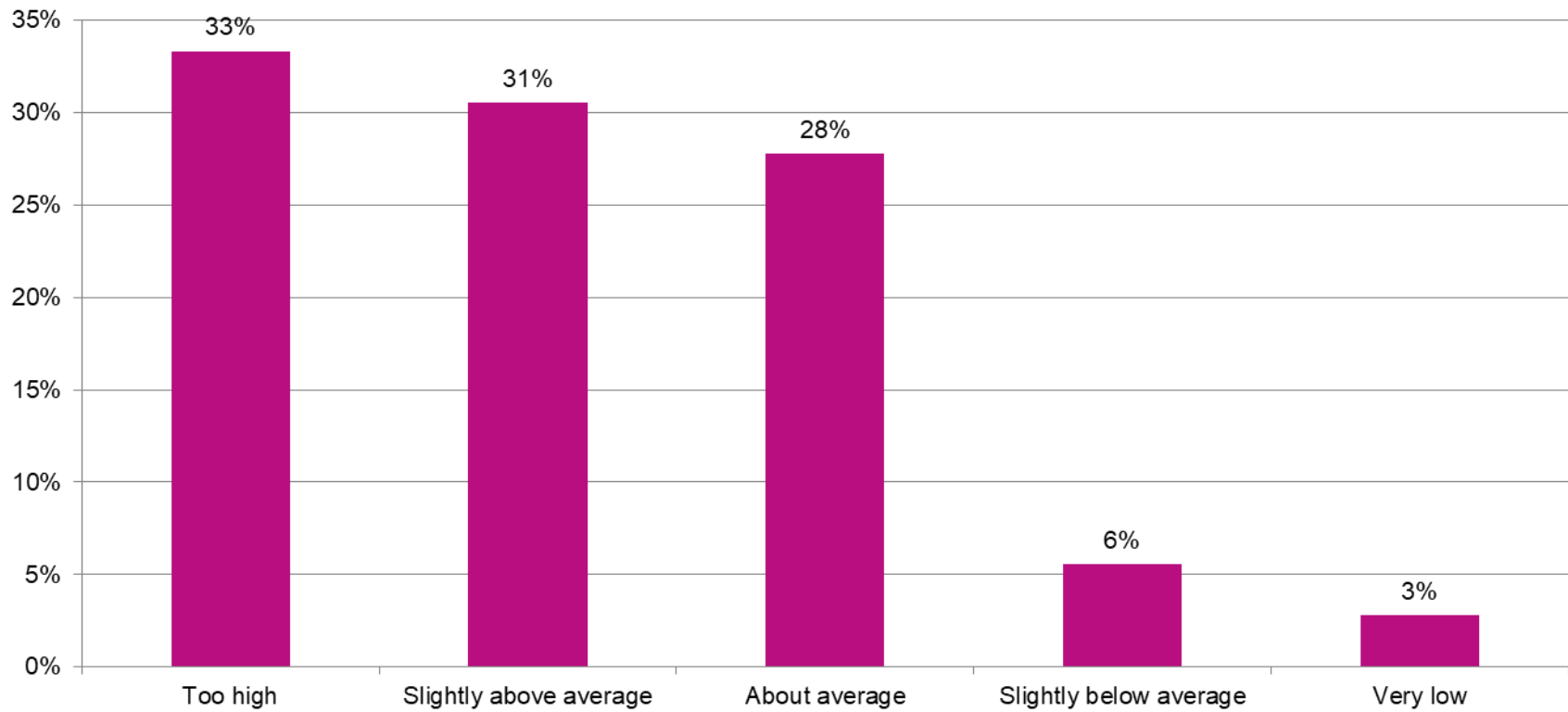
Staffing Levels – next 12 months

Has or does your service intend to implement any of the following within the next 12 months:



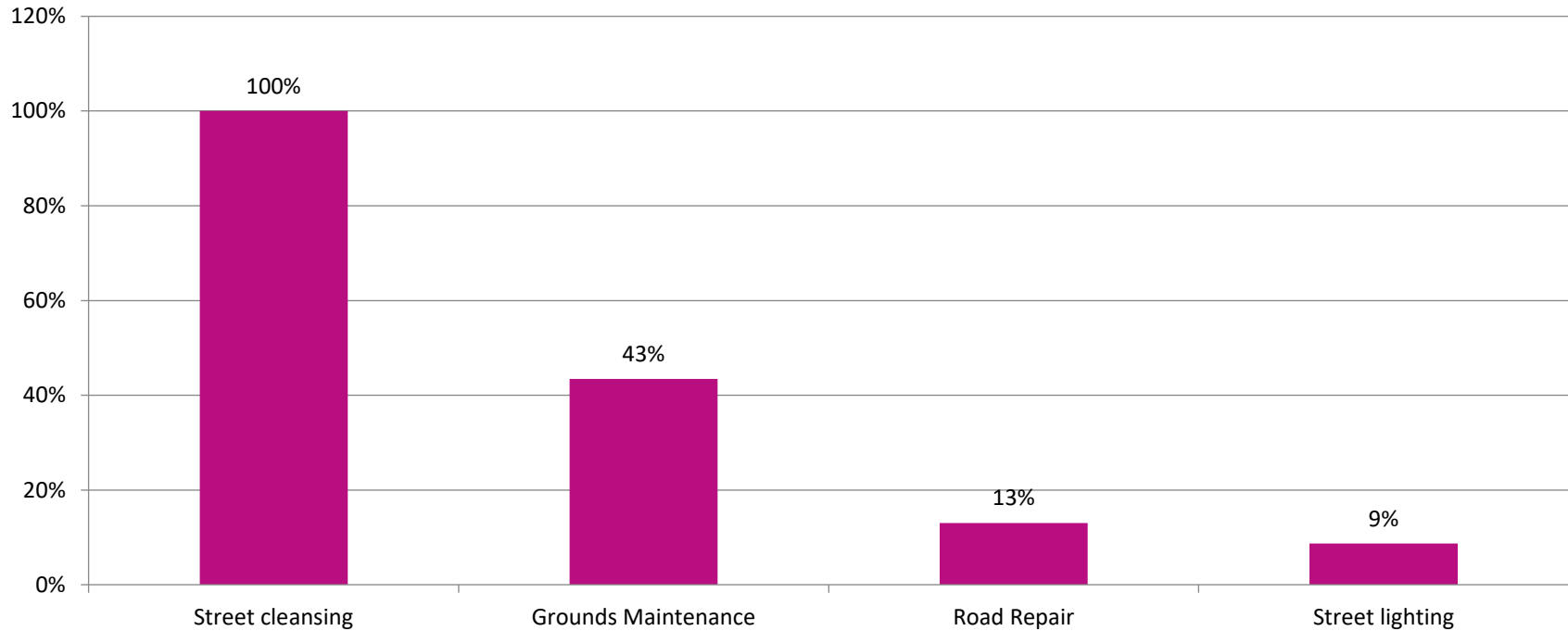
Staff Absence Levels

Are staff absence levels at an acceptable level?



Jointly managed services with waste

If yes, which services are jointly managed within your waste department?



In-House vs external provision

SERVICE PROVISION

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

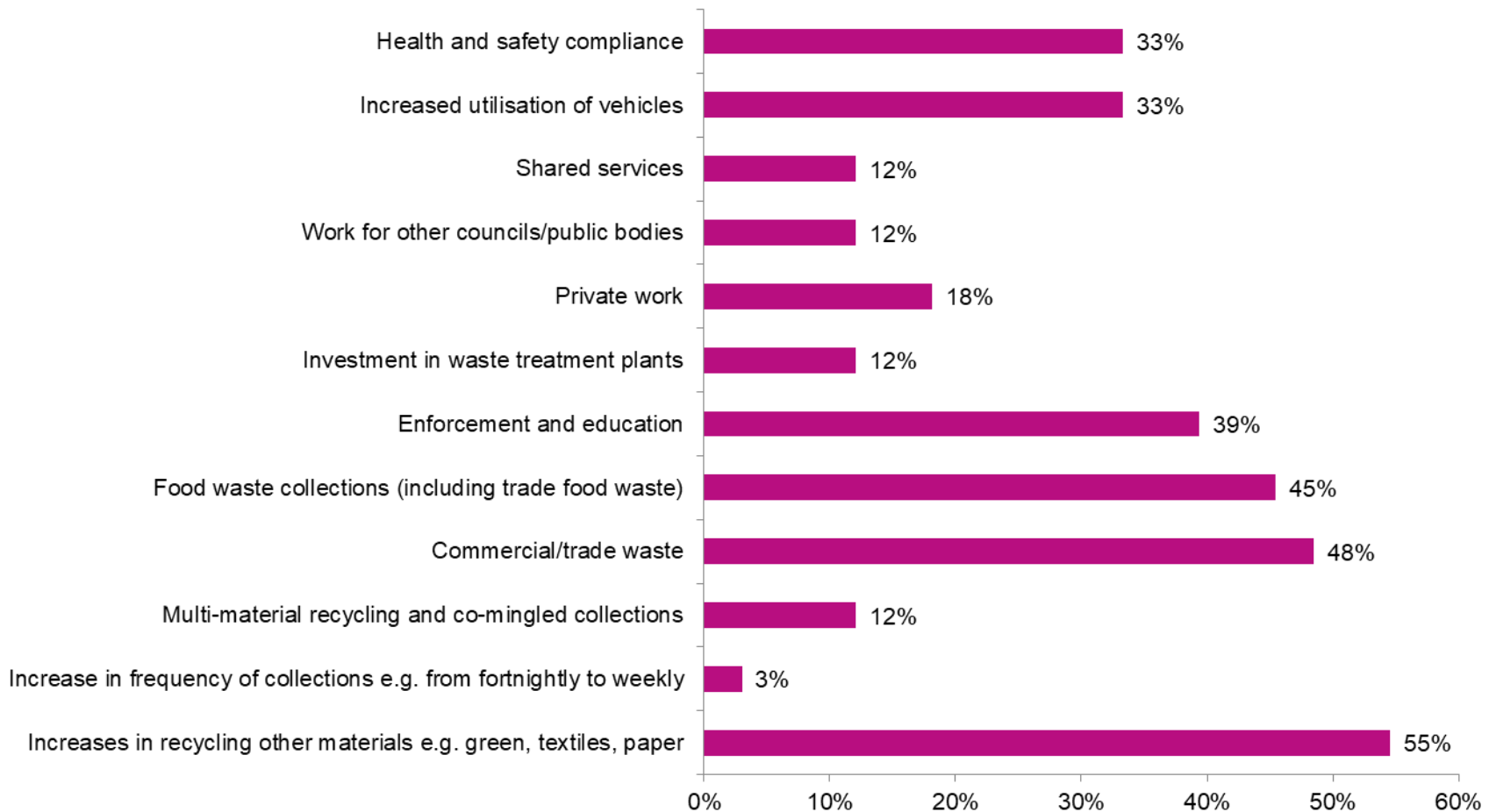
CONTRACT LENGTH

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



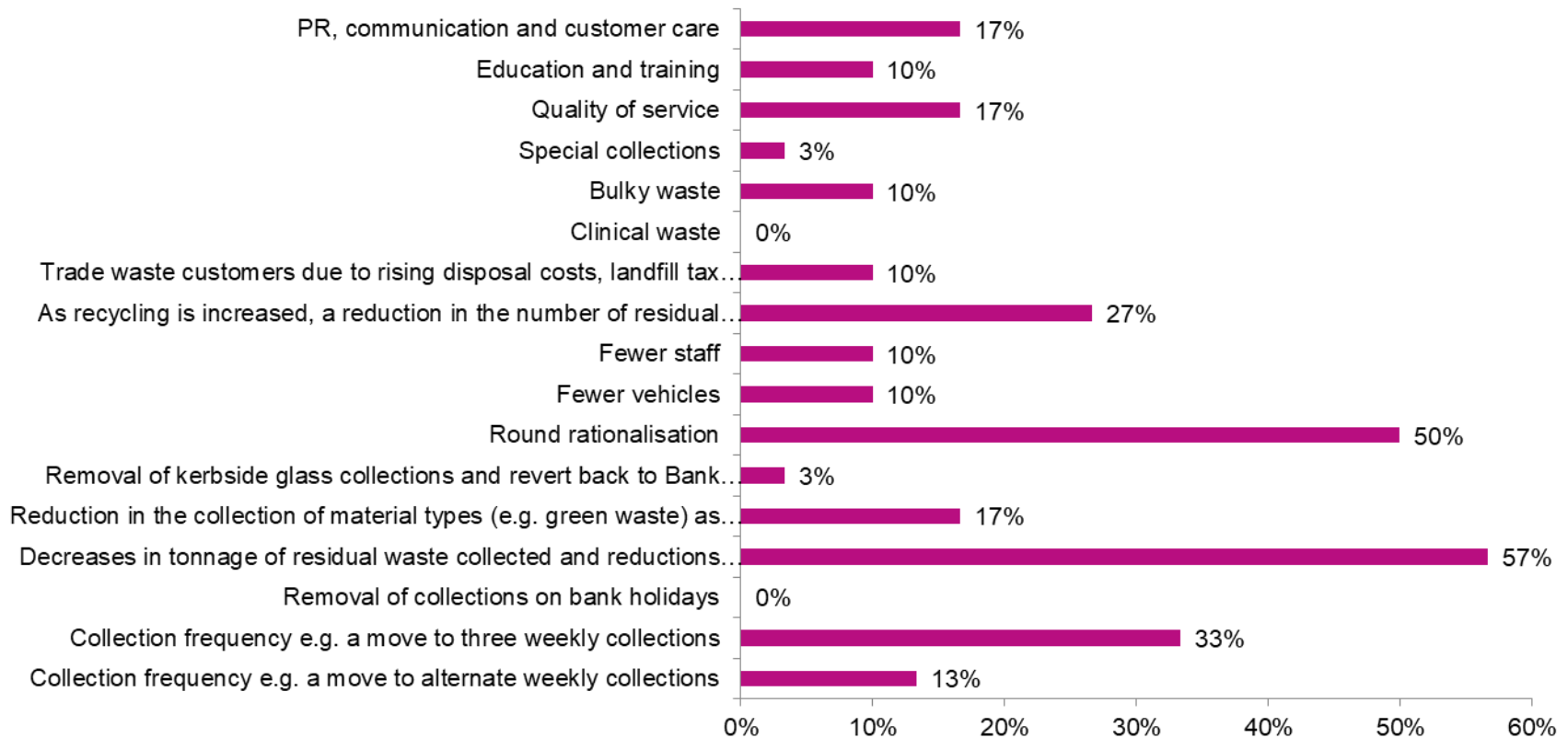
Service growth next 12 months

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

- Route optimisation/double shifting of vehicles/some new vehicles
- Review of local agreement to introduce collective task and finish (rather than general task & finish).
- In-sourcing of services
- Alternate weekly collections for recyclables and three weekly collections for residual waste
- Reducing contamination levels and implementing no side waste policies
- Increasing income generation opportunities – bulky waste charges, charging for green waste collection, wheeled bin replacements and increasing number of commercial waste collection contracts.
- New technology – bin sensors, in-cab CCTV, hand helds.
- Reviewing the operation of the Household Waste Recycling Centres

Service Reviews – Current or Proposing

30% completed review

15% review underway

33% Planning a review

Route optimisation	66.67%
GPS tracking	20.83%
CRM handhelds	12.50%
Eco drive vehicle monitors	0.00%
Review of productivity/work study	33.33%
Utilisation of vehicles	62.50%
Review of working time/rota's	41.67%
Service re-design	75.00%
Using systems thinking techniques	8.33%
Income generation capacity	25.00%
Other (please specify)	20.83%

- **How have the delays in bringing in the new requirements of the Resources and Waste Strategy affected your service?**
- *“Uncertainty in planning for future collection service”.*
- *“Uncertainty in forthcoming changes halting amendments to the service and giving uncertainty to vehicle replacement programme”.*
- *“Negotiating an extension to the existing contract but the recent further delays have impacted this and the extension will now not cover the timeframes now in place”.*
- *“No certainty in the policy landscape means delayed investment by private sector and knock-on delays to introduce new collections schemes to drive up recycling and reduce carbon impact”.*
- *“They have prevented us from trying to change the collection service, delayed investment in vehicles and delayed implementation of a food waste collection service”.*

Conclusions

- Resource and Waste Strategy implications new focus of work
- Promise of additional funding in order to meet strategy requirements
- Reducing service costs whilst increasing income - key objective
- Reduction of collection frequencies, particularly residual waste in order to drive up recycling levels/reducing service costs
- Most recyclables still co-mingled , may change in future re. quality needs.
- Still only 62% collecting food waste.
- In-House provision has fallen for some reason
- Fewer expecting to lose staff
- Behavioural change seen as critical to increase recycling rates
- New challenges Climate emergency declarations, resource and waste bill, new technologies considerations now impacting

**LOCAL SERVICES
LOCAL SOLUTIONS**

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