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APSE State of the Market Report 2019

Refuse Collection and Recycling

All Change

Resources and Waste Strategy (December 2018)

- Core set of materials to be collected for recycling
- Consistency in collection methodologies
- Deposit Return Scheme, the Plastics Tax and Extended Producer Responsibility proposals.
- Circular economy ultimate goal.
- General agreement from local authorities as to strategy aims
- Concerns over funding, timescales, communications, private sector buy-in and current contract arrangements.

The Bigger Picture

Better product design: incorporating, less waste, recyclability, alternatives, taxation

Improved public understanding: simpler recycling requirements, uniform communications, improved purchasing choices, reducing food waste, sustainable lifestyles.

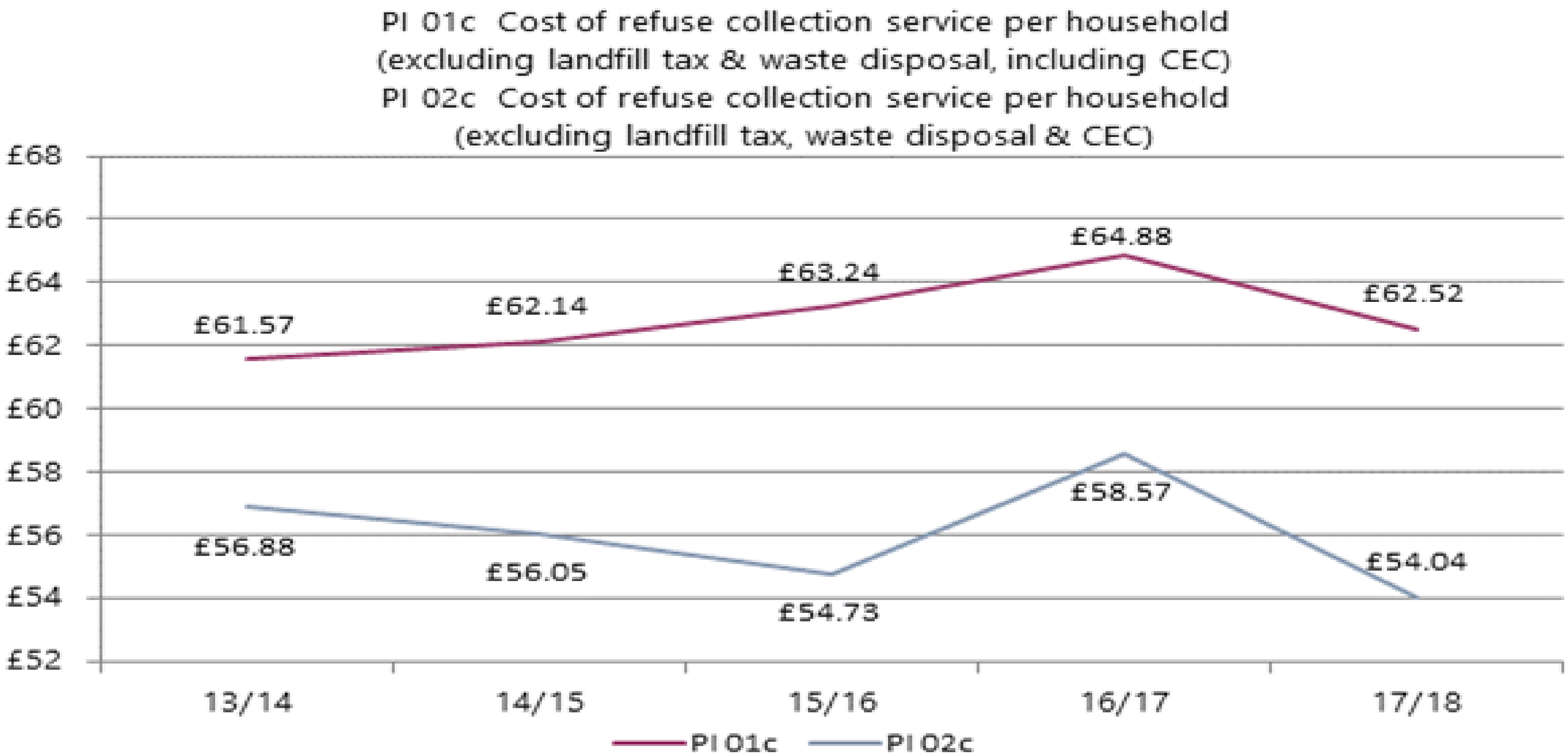
Proximity principle: UK recycling infrastructure opportunities, reduced reliance upon overseas market.

Climate change : reduce emissions from landfill, plastics pollution; low emission/electric refuse collection fleets, improved waste treatment technologies.

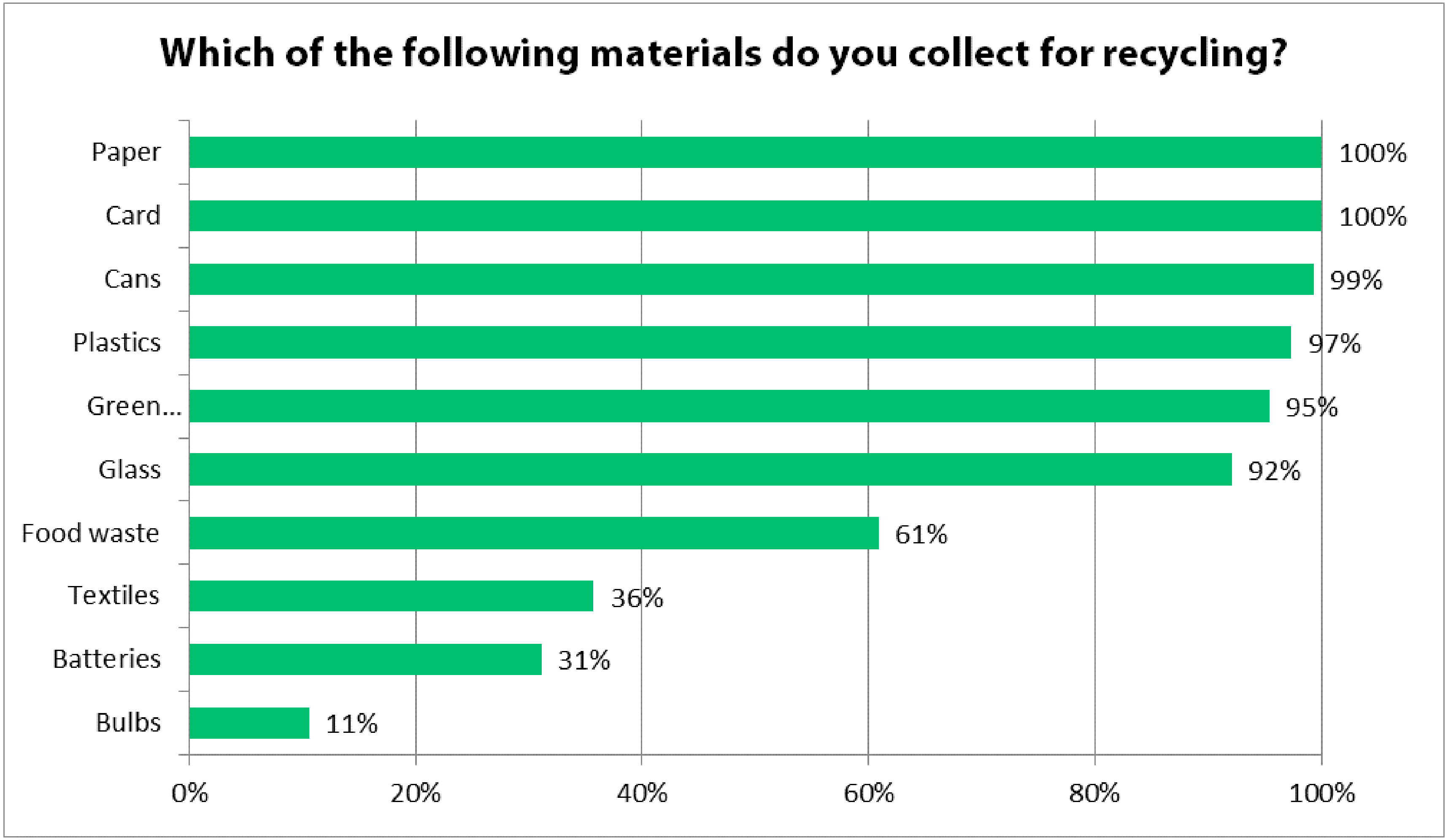
State of the Market Surveys

- State of the Market Survey 2019
- 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
- Use full for benchmarking and performance management
- Used by National Government and in APSE research documents
- National Litter Strategy, HLF, Parks Action Group, School Food Plan, Press and trade and national media to enhance knowledge of local government services.

Cost of Refuse Collection Services



Materials Recycled



Collection Frequencies

CURRENT STATE OF PLAY

Residual collections

- 13% weekly,
- 79% fortnightly
- 6% three weekly,
- 2% four weekly.

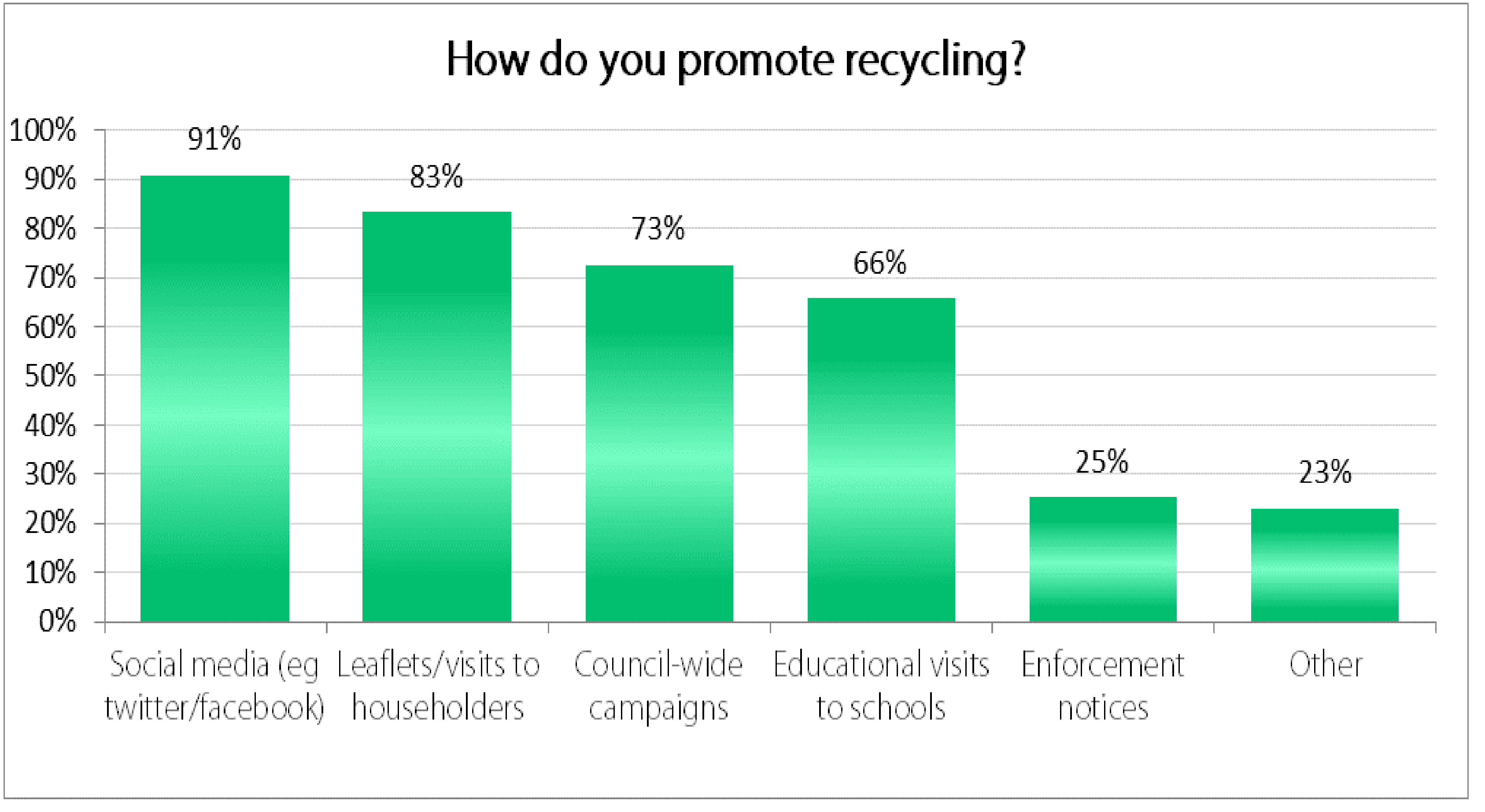
CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections now the norm
- growing numbers introducing three weekly residual collections.
- 13% of local authorities looking at introducing four weekly residual collections.

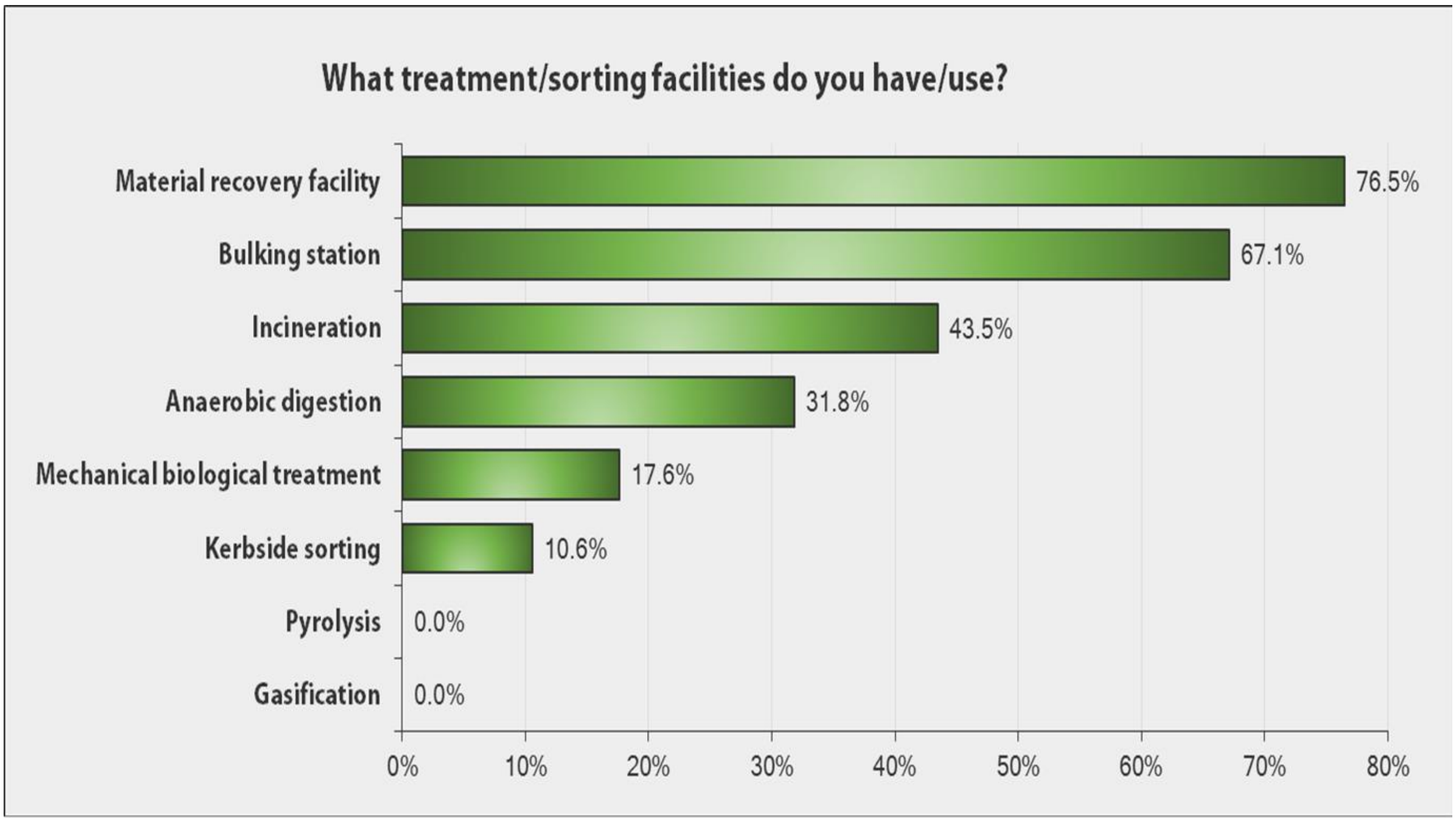
Collection Methods

- 48% Operate ‘task and finish’
- 22% use zonal working systems
- 52% use 5 day working week / 25% use a 4 day working week
- 64% have co-mingled collection system
- 18% operate source segregated collections
- 18% have separate material collections and a mixture of co-mingling.

Promoting recycling



Waste Treatment Facilities



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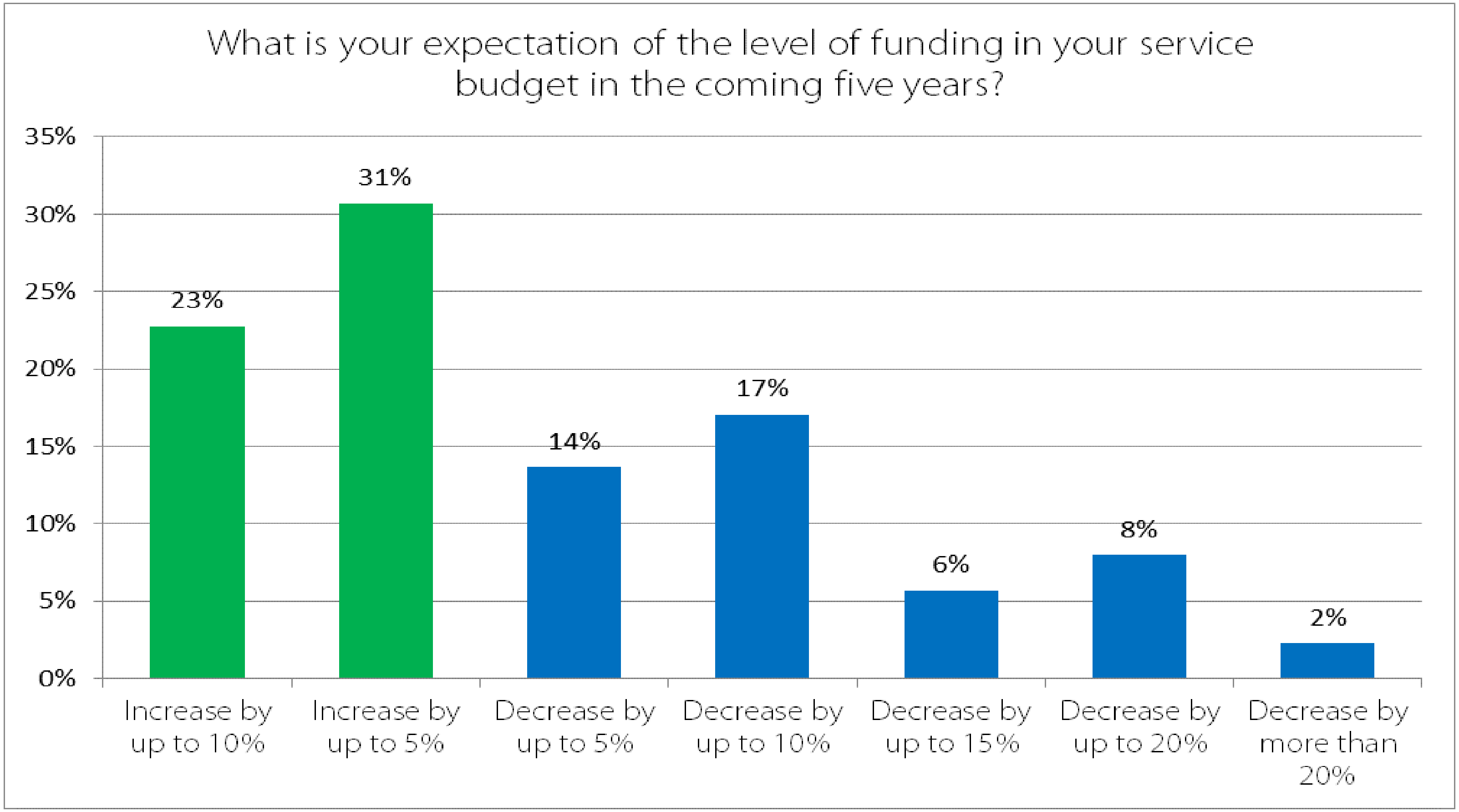
Budget Changes



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Staffing Levels – next 12 months

Answer Options	Results from 2019	Results from 2018	Results from 2017
Natural wastage	18.1%	17.4%	30.0%
Recruitment freeze	7.5%	7.3%	8.6%
Voluntary redundancy	12.8%	13.0%	17.1%
Compulsory redundancy	3.2%	1.5%	7.1%
None of these	74.5%	72.5%	62.9%

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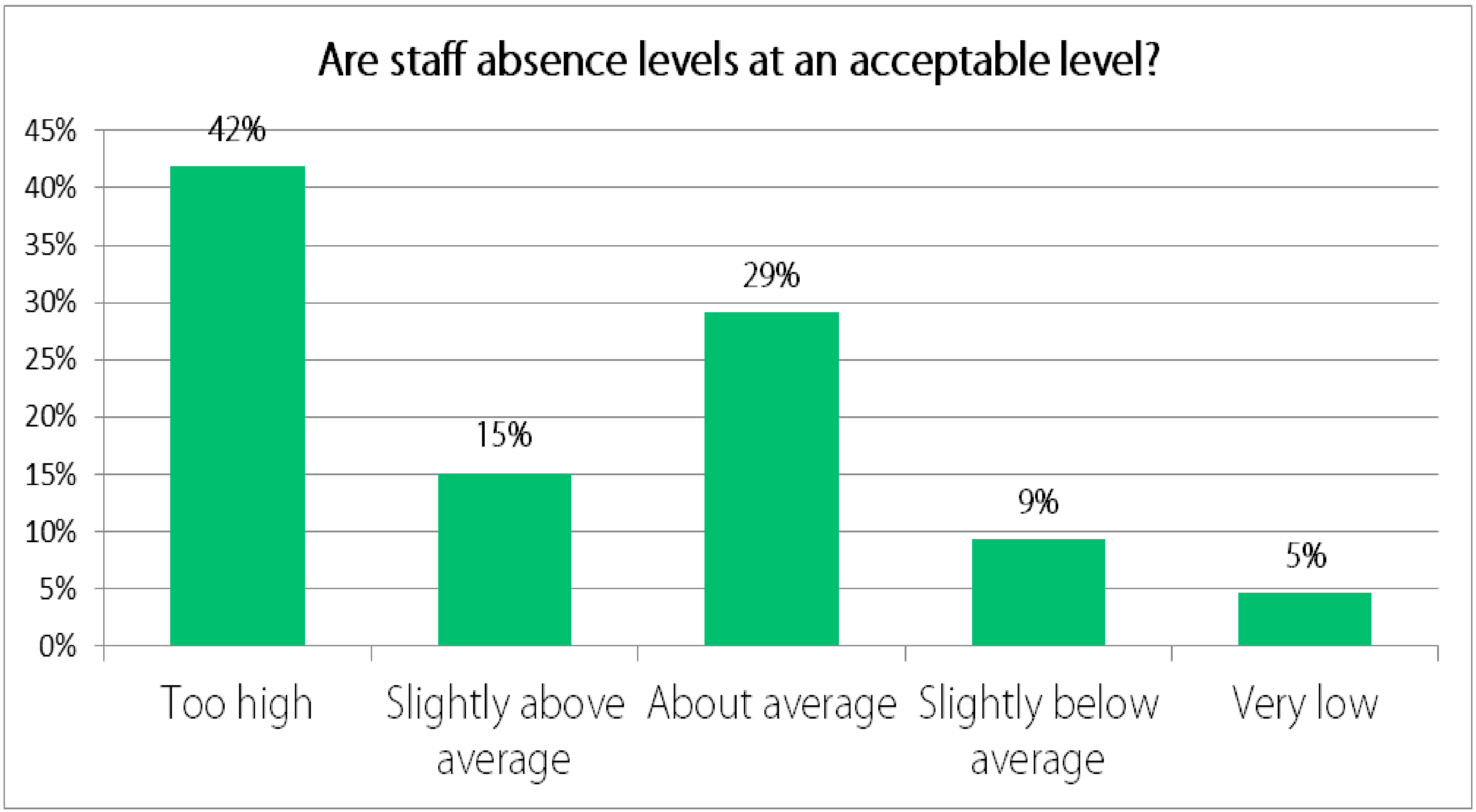
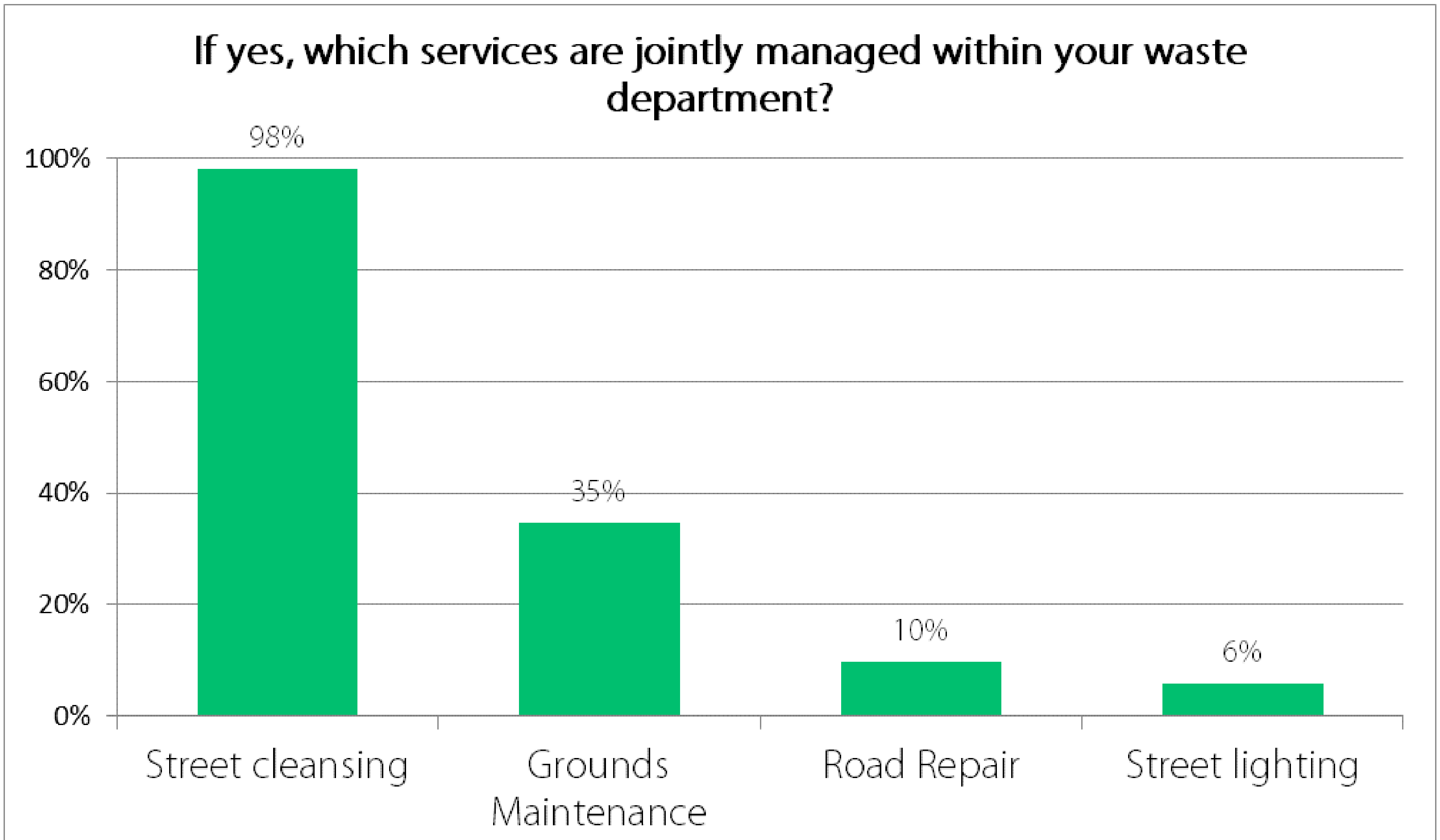
Staff Absence Levels



Jointly managed services with waste



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In-House vs external provision

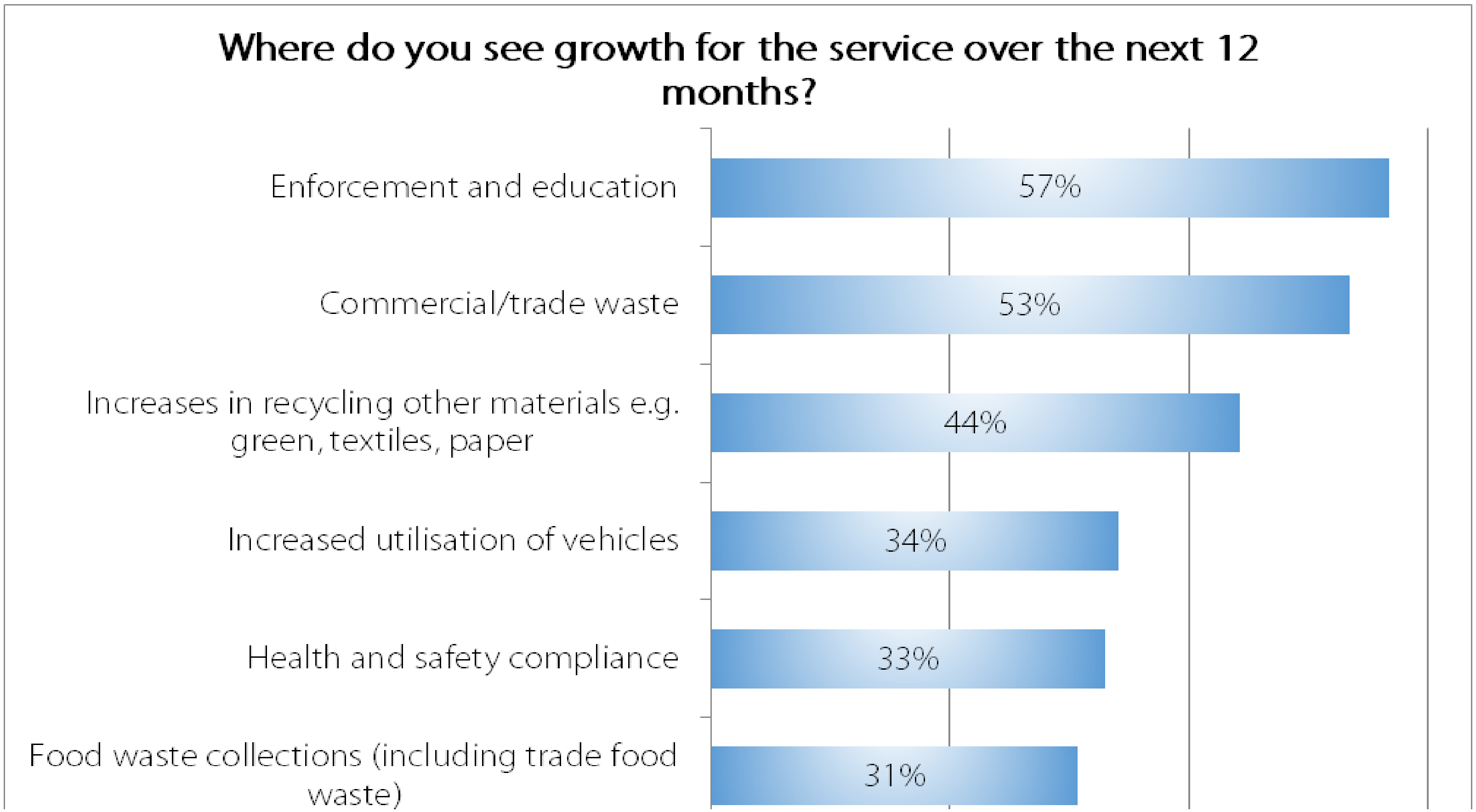
SERVICE PROVISION

- 72% (68% in 2018) provide services in-house.
- 23% (28% in 2018) externally provided
- 5%   (4% in 2018) joint waste authorities

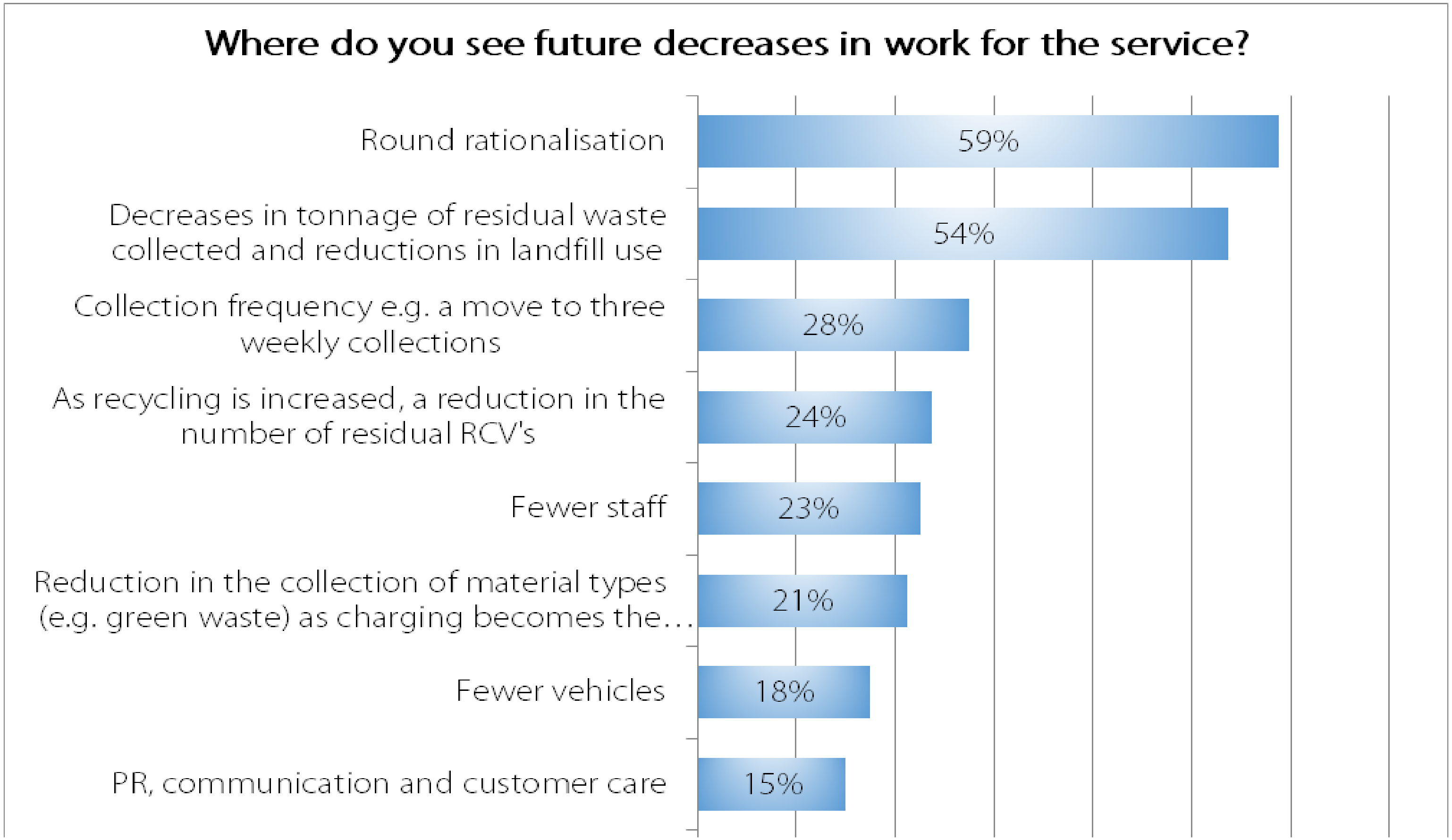
CONTRACT LENGTH

- 10+ years = 15%
- 10 - 7 years = 52%
- 7 - 5 years = 18%
- Up to 5 years = 15%

Service growth next 12 months



Service decreases next 12 months



Service Efficiencies

- Route optimisation/double shifting of vehicles
- 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.
- Introducing payment by weight for commercial waste
- New technology – bin sensors, in-cab CCTV
- Reducing reliance on agency staff through work planning improvements Reviewing staff and vehicle levels
- Cross boundary working

Service Reviews – Current or Proposing

32% completed review
37% review underway
24% Planning a review

Route optimisation	84%
Service re-design	65%
Utilisation of vehicles	58%
Review of productivity/work study	43%
Income generation capacity	42%
GPS tracking	39%
Review of working time/rota's	36%
CRM handhelds	17%
Using systems thinking techniques	17%
Eco drive vehicle monitors	12%
Other	5%

Conclusions

- Reducing service costs whilst increasing income - key objective
- Resource and Waste Strategy implications new focus of work
- Promise of additional funding in order to meet strategy requirements will be welcome
- 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 61% collecting food waste.
- Level of cuts not as high as expected – growth for over half of respondents
- In-House provision has risen
- Fewer expecting to lose staff
- Behavioural change seen as critical to increase recycling rates
- Climate emergency declarations considerations now impacting

LOCAL SERVICES
LOCAL SOLUTIONS

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