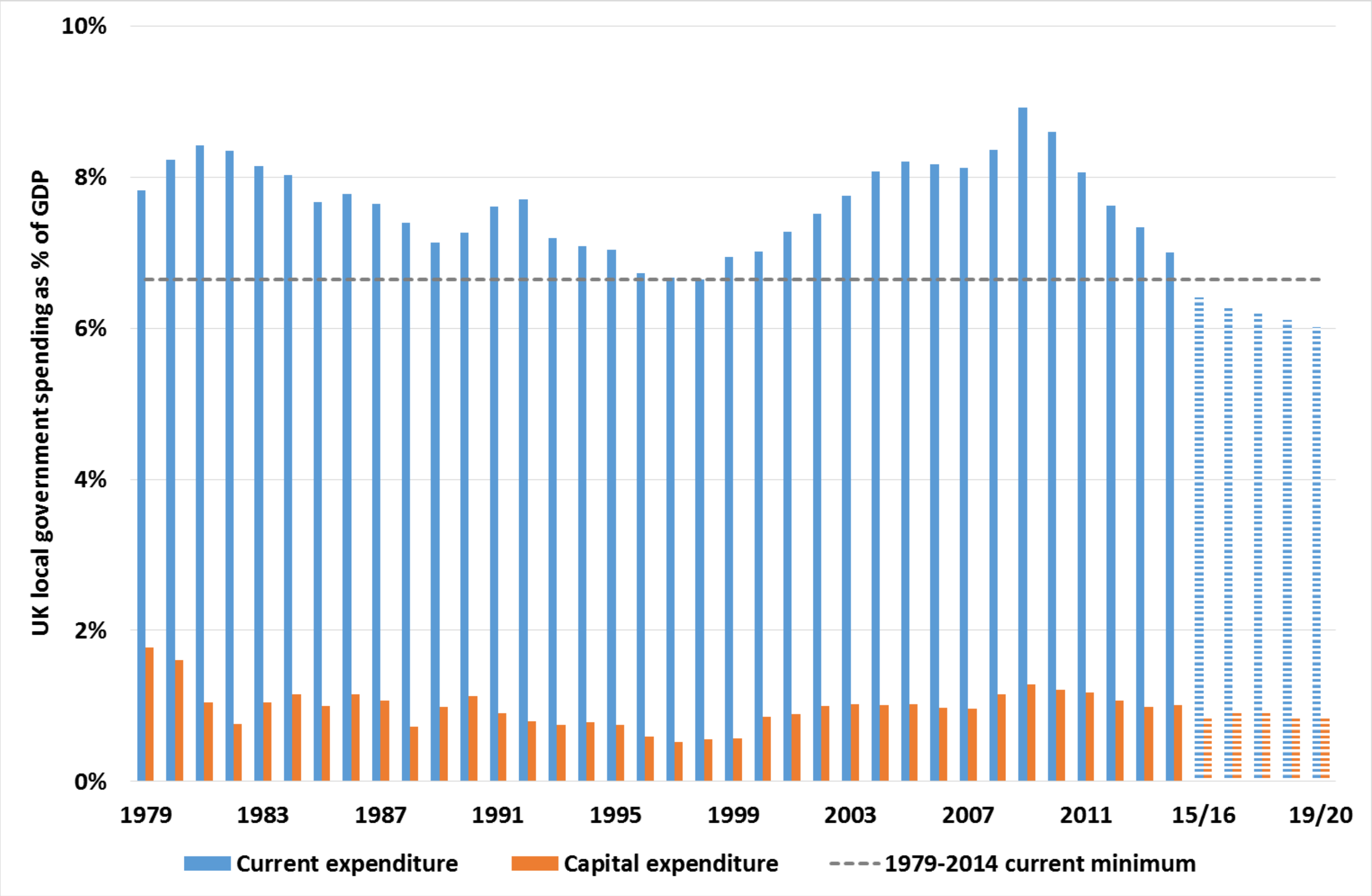
APSE State of the Market Report 2017
Refuse Collection and Recycling

- State of the Market Surveys
- 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 State of Parks, School Food Plan, Press and trade and national media to enhance knowledge of local government services.

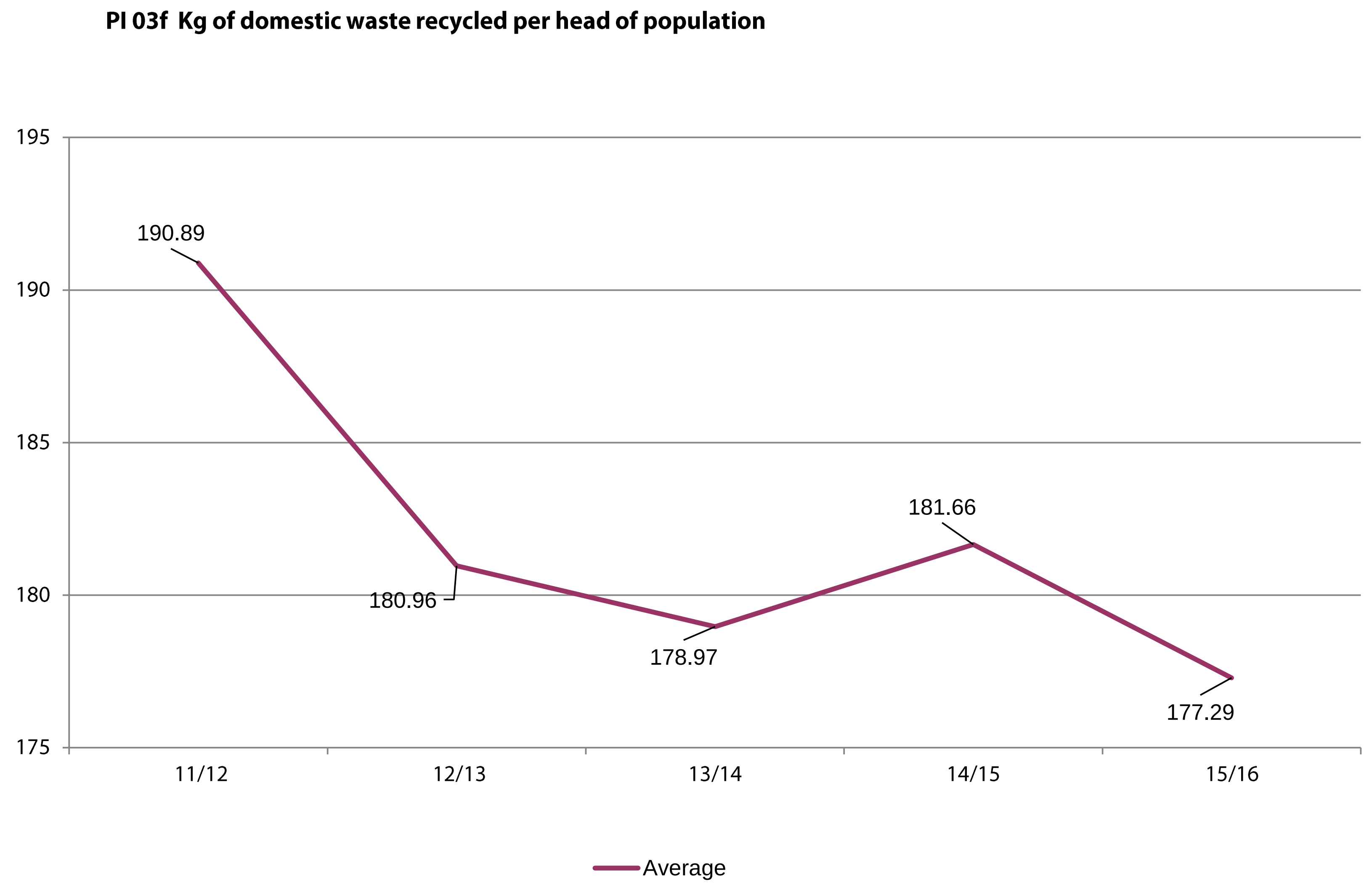
UK local government spending as a share of GDP: current spending, already below the 1979-2014 minimum, is projected to go on falling to 2020



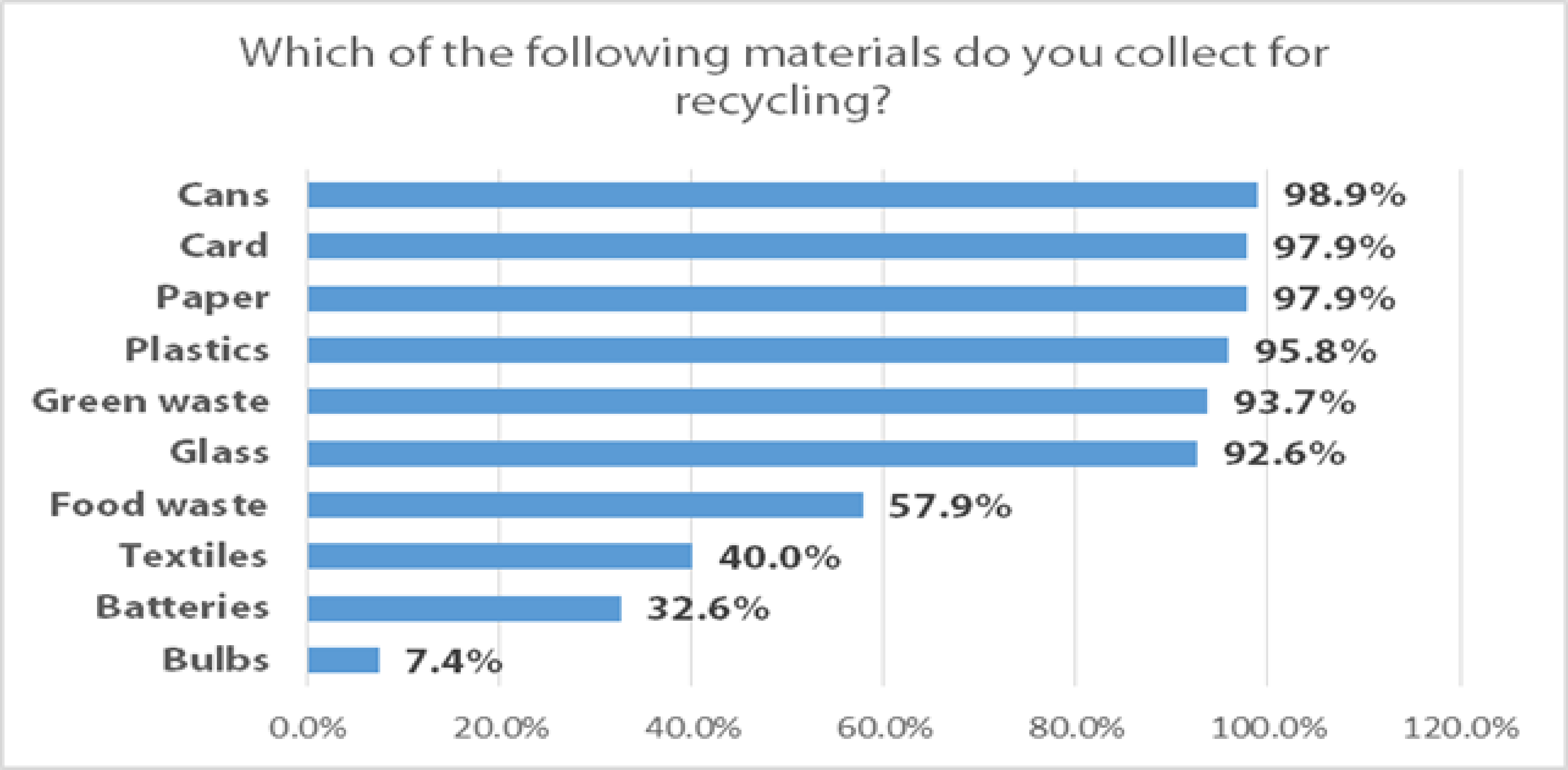
Cost of Refuse Collection Services

Productivity and quality indicators

Refuse collection



Materials Recycled



Collection Frequencies

CURRENT STATE OF PLAY

Residual collections

- 17% weekly,
- 77% fortnightly
- 2% three weekly,
- 2% four weekly.

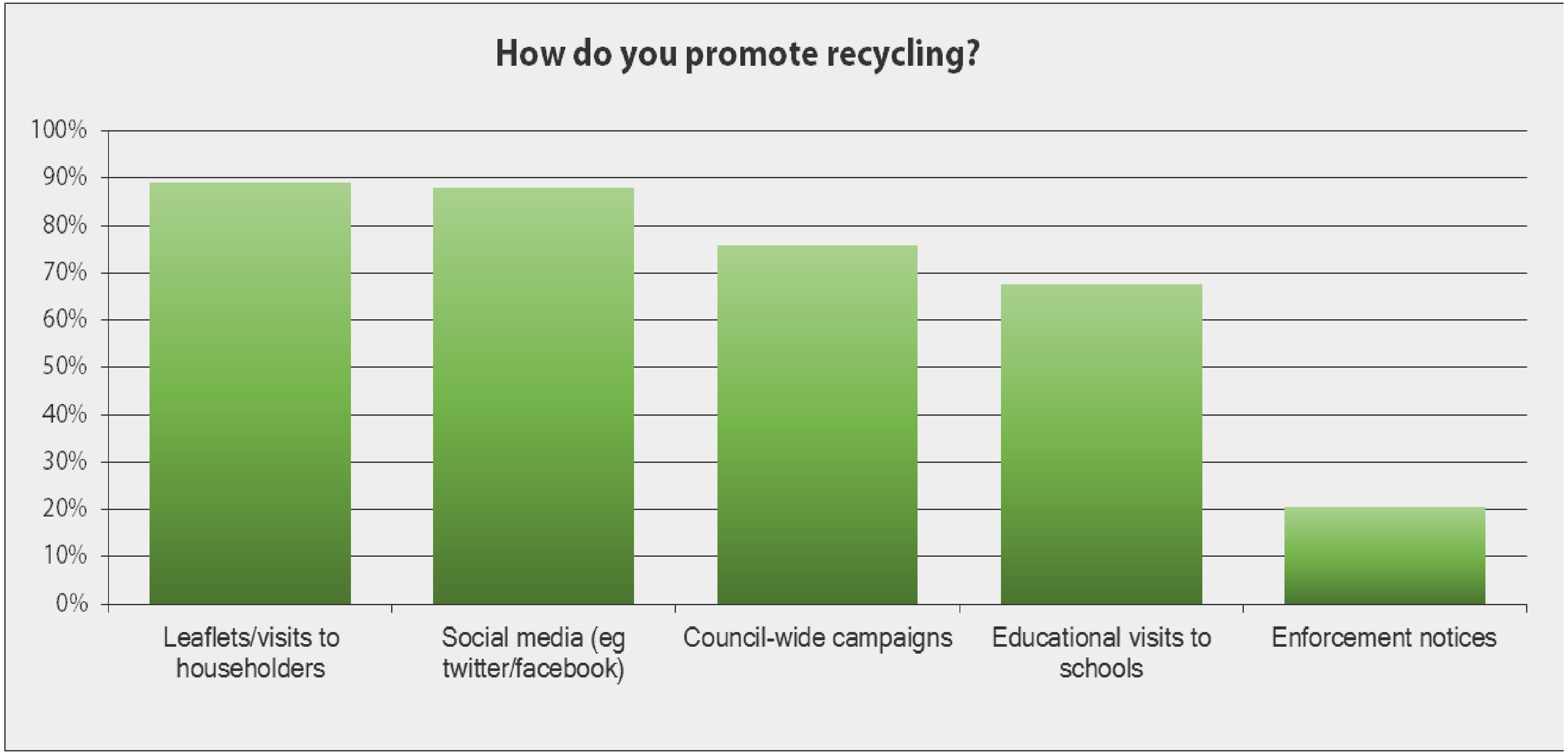
CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections becoming the norm
- growing numbers looking at three even four weekly residual collections.
- Increases in separate material collections driven by TEEP regulations and higher income for better quality materials .

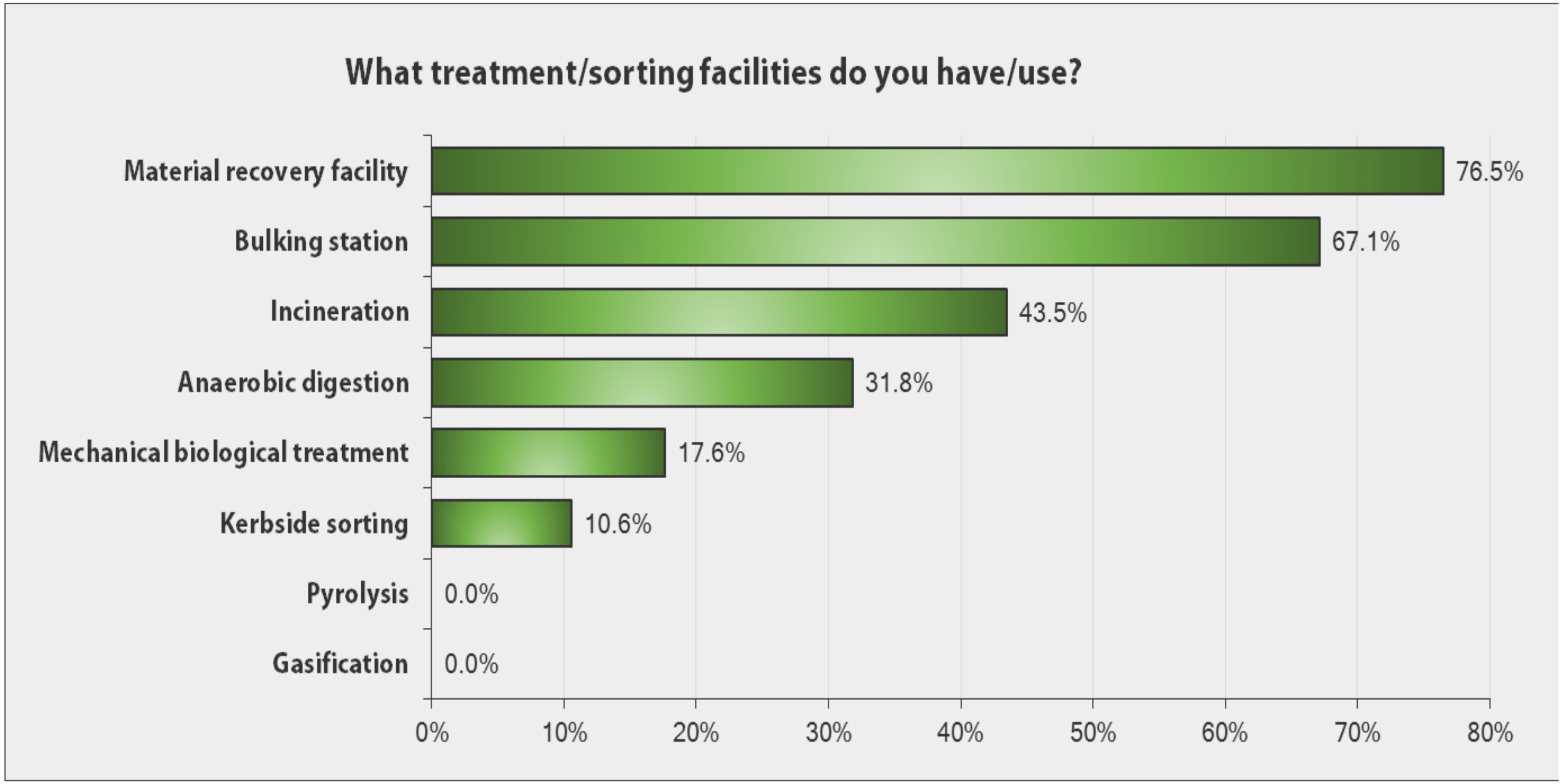
Collection Methods

- 52% Operate ‘task and finish’
- 36% use zonal working systems
- 43% use 5 day working week / 29% use a 4 day working week
- 85% have co-mingled collection system
- 23% have separate material collections and a mixture of co-mingling.

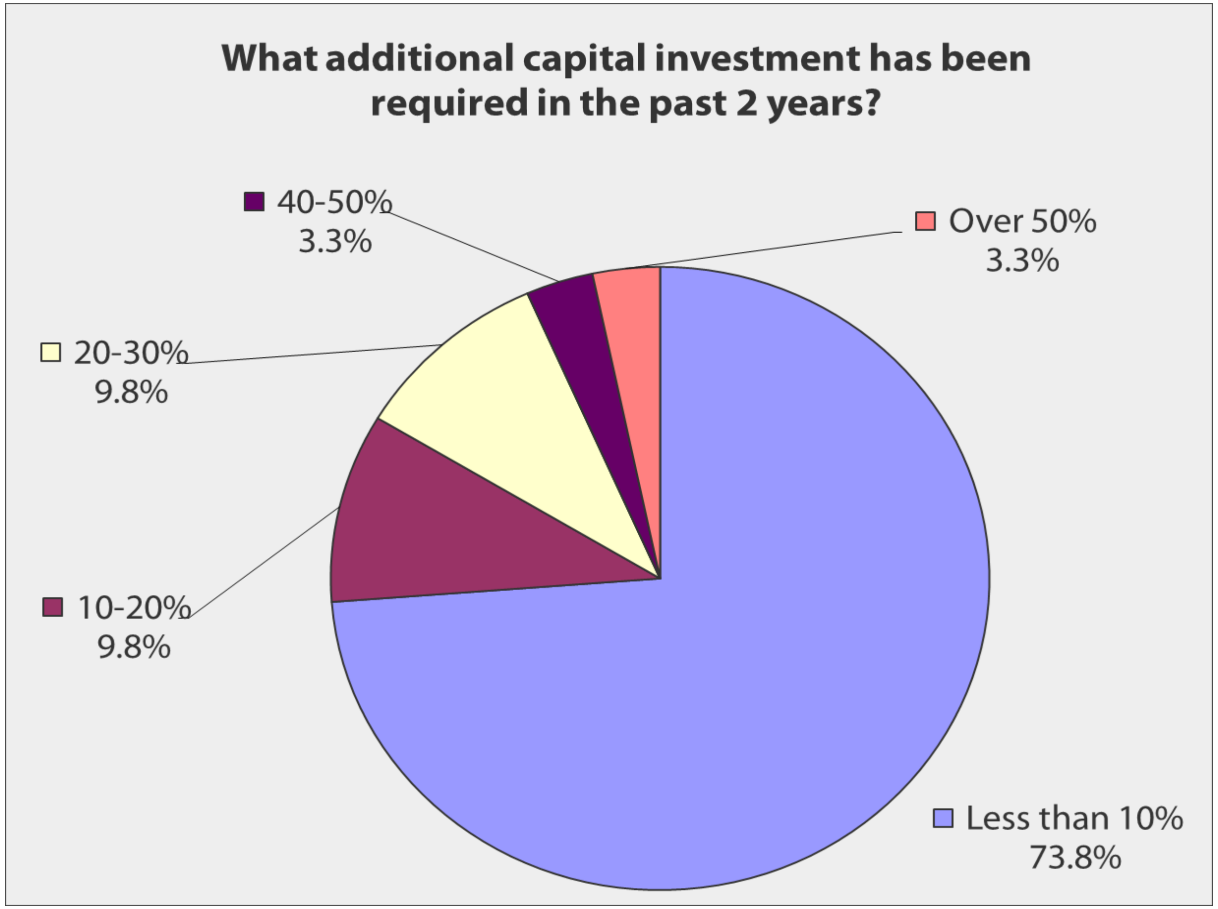
Promoting recycling



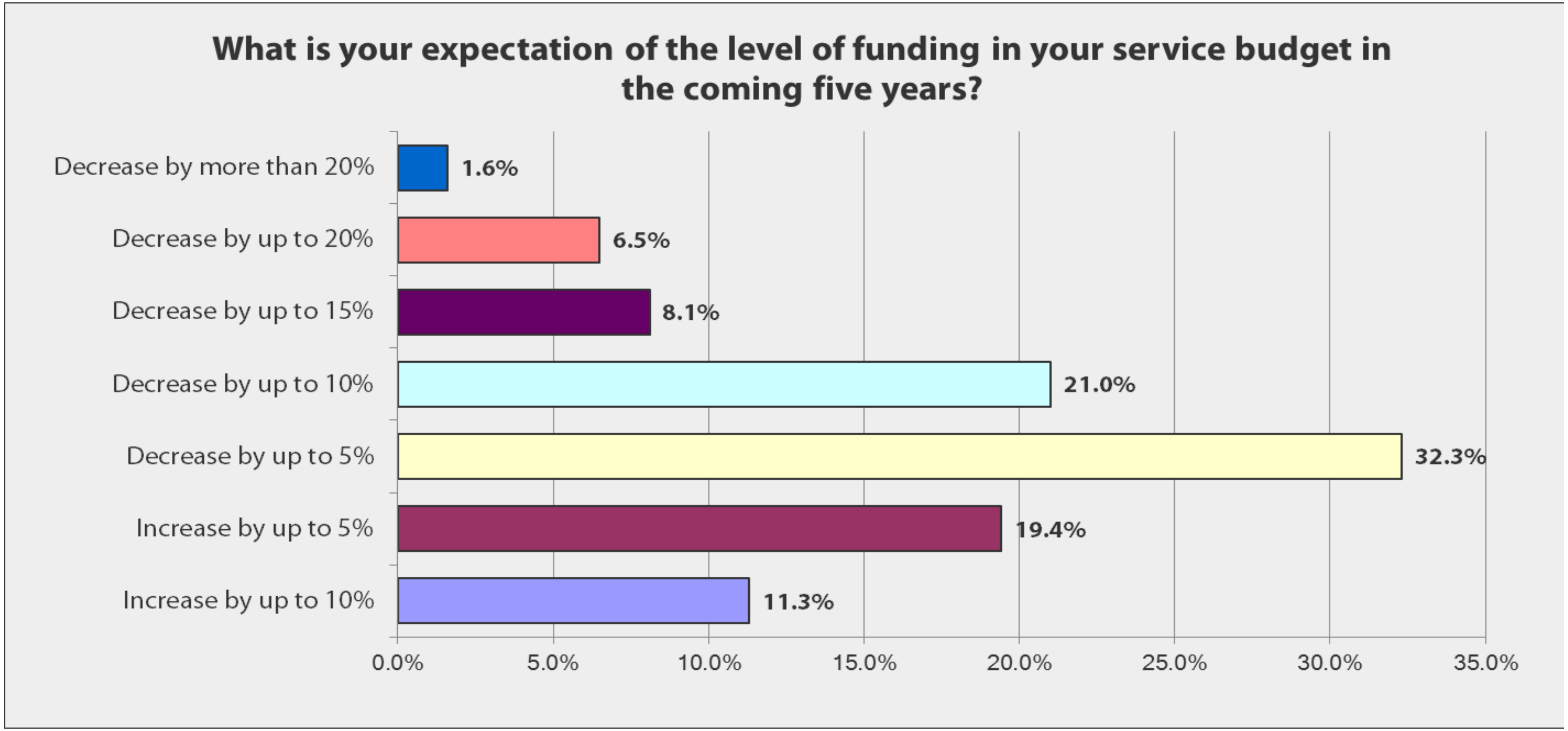
Waste Treatment Facilities



Investment in and managing the service



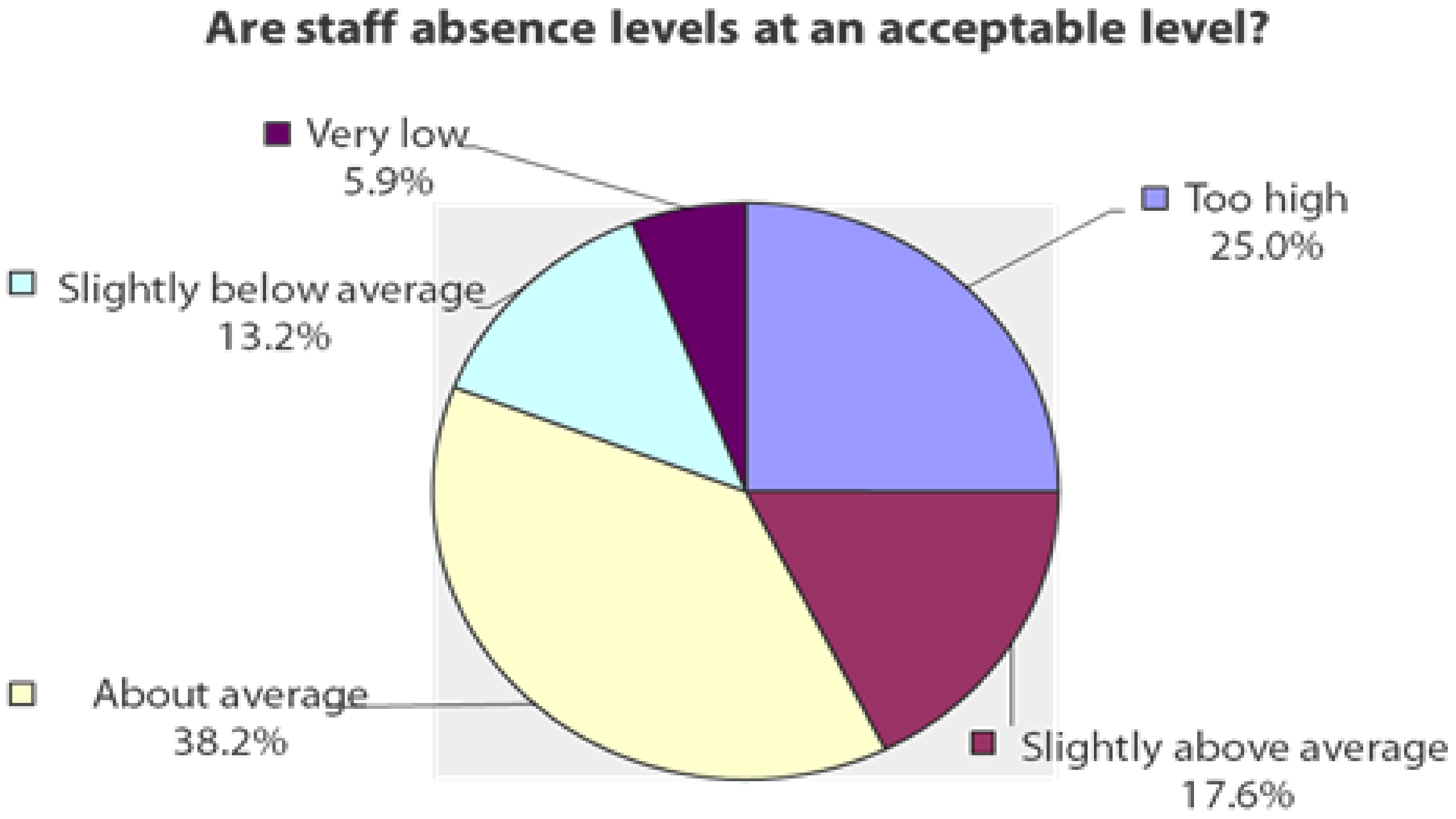
Budget Changes



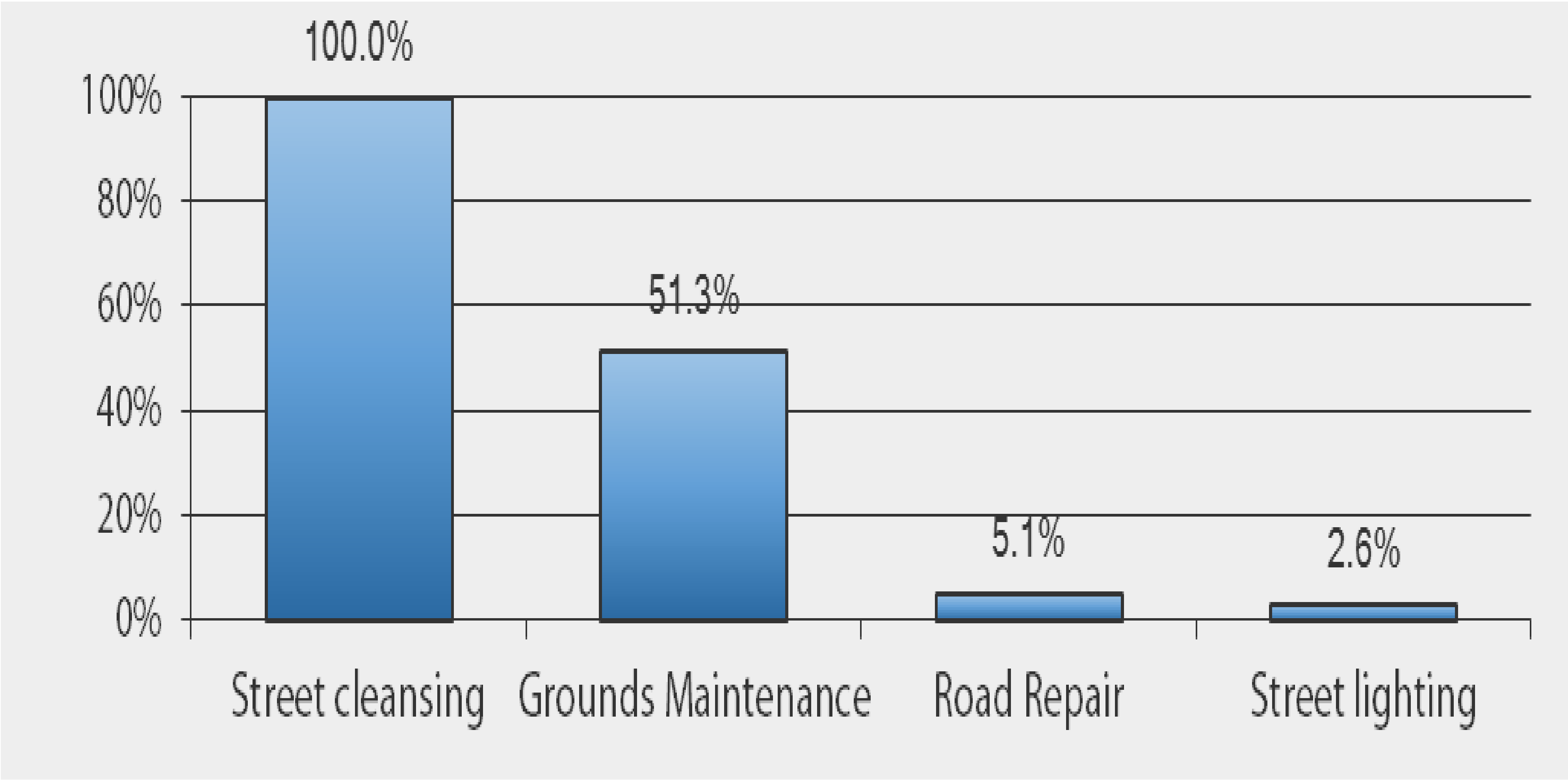
Staffing Levels – next 12 months

Answer Options	Results from 2017	Results from 2016	Results from 2015
Natural wastage	30.0%	34.3%	34.7%
Recruitment freeze	8.6%	13.4%	19.4%
Voluntary redundancy	17.1%	32.8%	34.7%
Compulsory redundancy	7.1%	7.5%	8.3%
None of these	62.9%	43.3%	47.2%

Staff Absence Levels



Jointly managed services with waste



In-House vs external provision

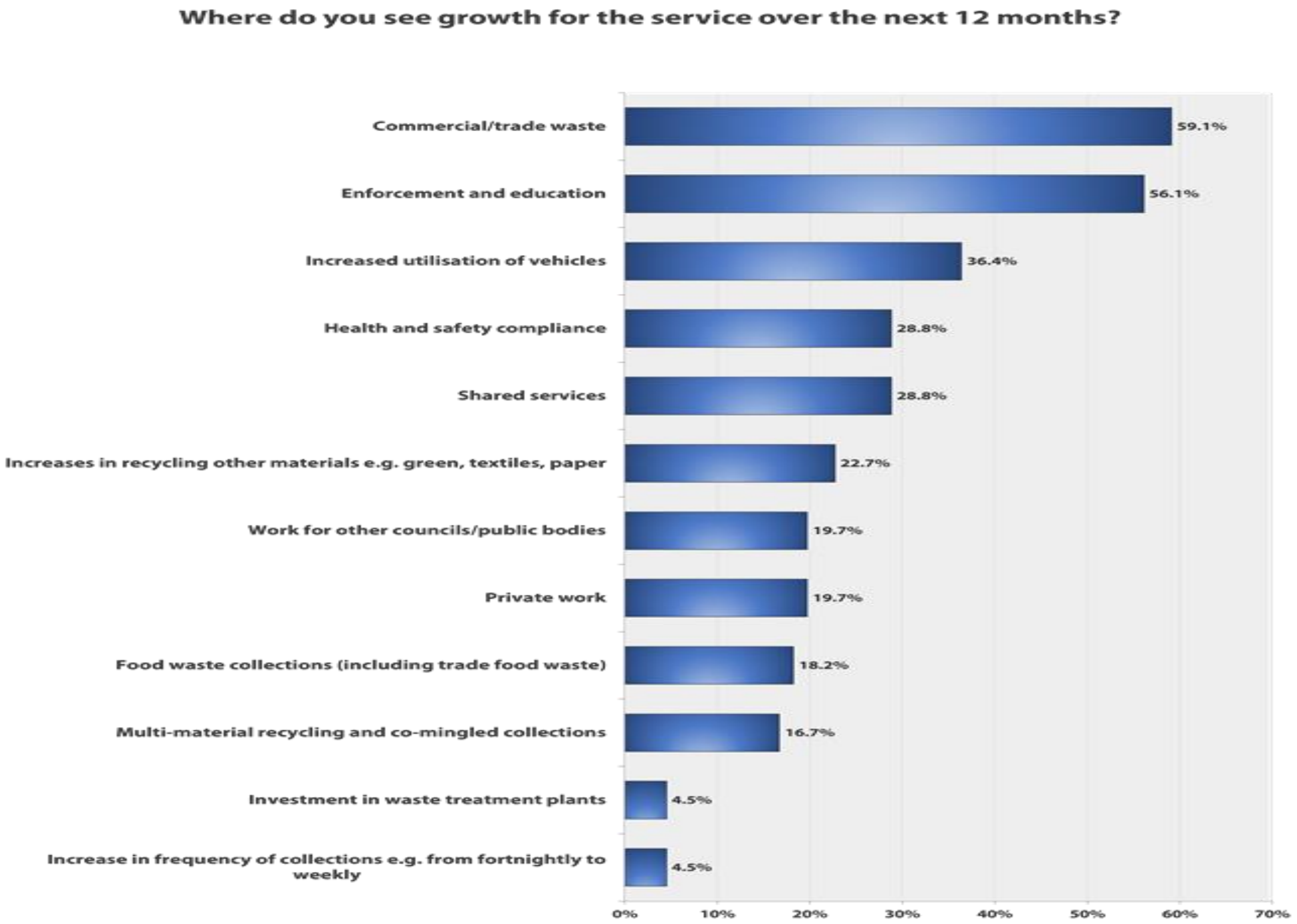
SERVICE PROVISION

- 68% provide services in-house
- 28% externally provided
- 4% joint waste authorities

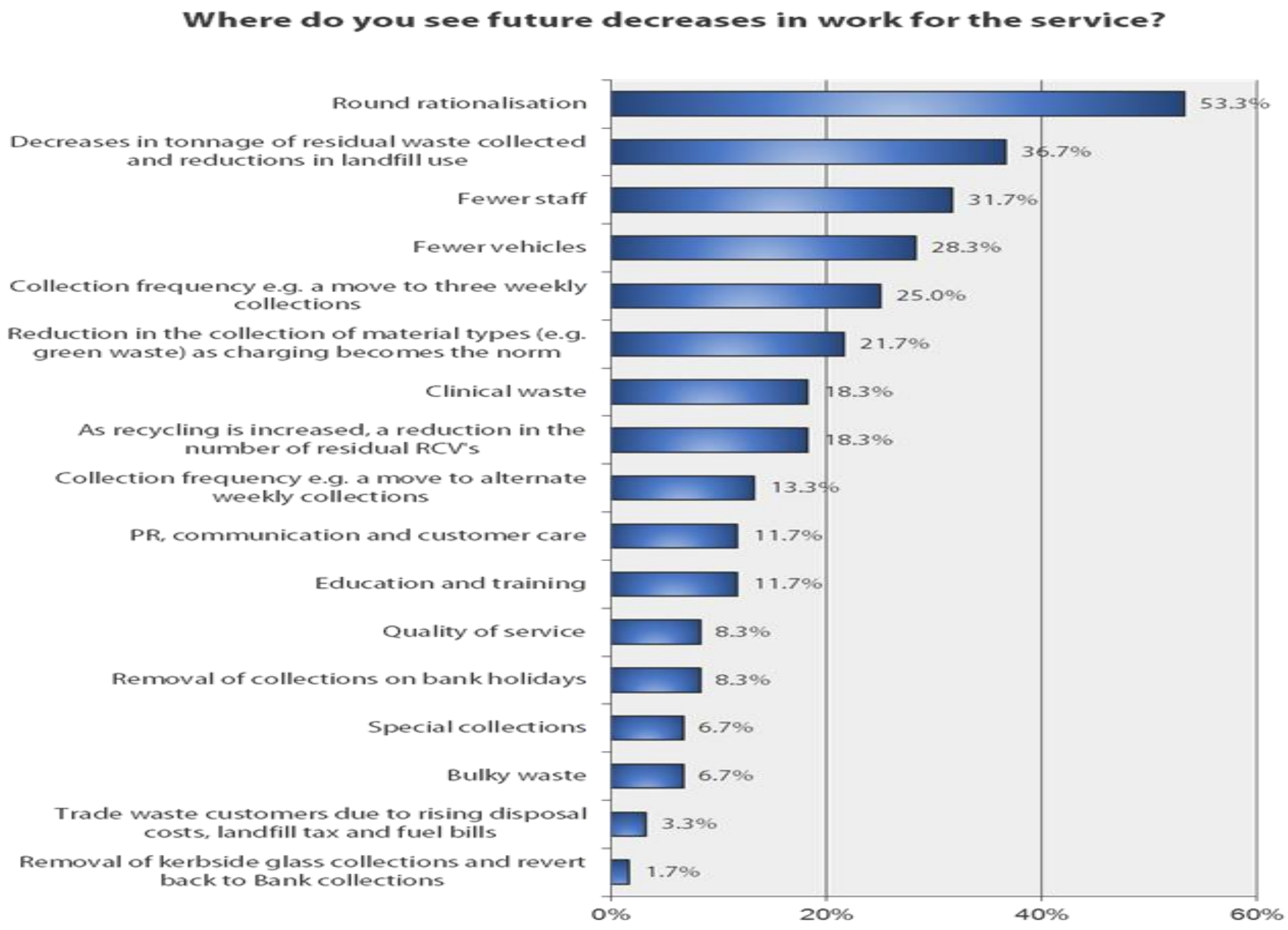
CONTRACT LENGTH

- 10+ years = 24%
- 10 - 7 years = 36%
- 7 - 5 years = 20%
- Up to 5 years = 20%

Service growth next 12 months



Service decreases next 12 months



Service Efficiencies

- Route optimisation
- Double-shifting of vehicles
- Alternate weekly collections for recyclables
- Three weekly collections for residual waste
- Reviewing provision of household waste recycling centres
- 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
- Reducing contamination levels and introducing no side waste policy
- Reviewing staff and vehicle levels
- Cross boundary working

Service Reviews – Current or Proposing

41% completed review
38% review underway
17% Planning a review

Answer Options	Response Percent
Route optimisation	80.3%
GPS tracking	44.3%
CRM handhelds	37.7%
Eco drive vehicle monitors	14.8%
Review of productivity/work study	42.6%
Utilisation of vehicles	67.2%
Review of working time/rota's	49.2%
Service re-design	57.4%
Using systems thinking techniques	26.2%
Income generation capacity	50.8%

Conclusions

- Reducing service costs whilst increasing income - key objective
- Reduction of collection frequencies, particularly residual waste in order to drive up recycling levels.
- Most recyclables still co-mingled despite TEEP requirements
- Still only 57.9% collecting food waste.
- Level of cuts not as high as expected
- In-House provision has risen
- Fewer expecting to lose staff
- Behavioural change seen as critical to increase recycling rates

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