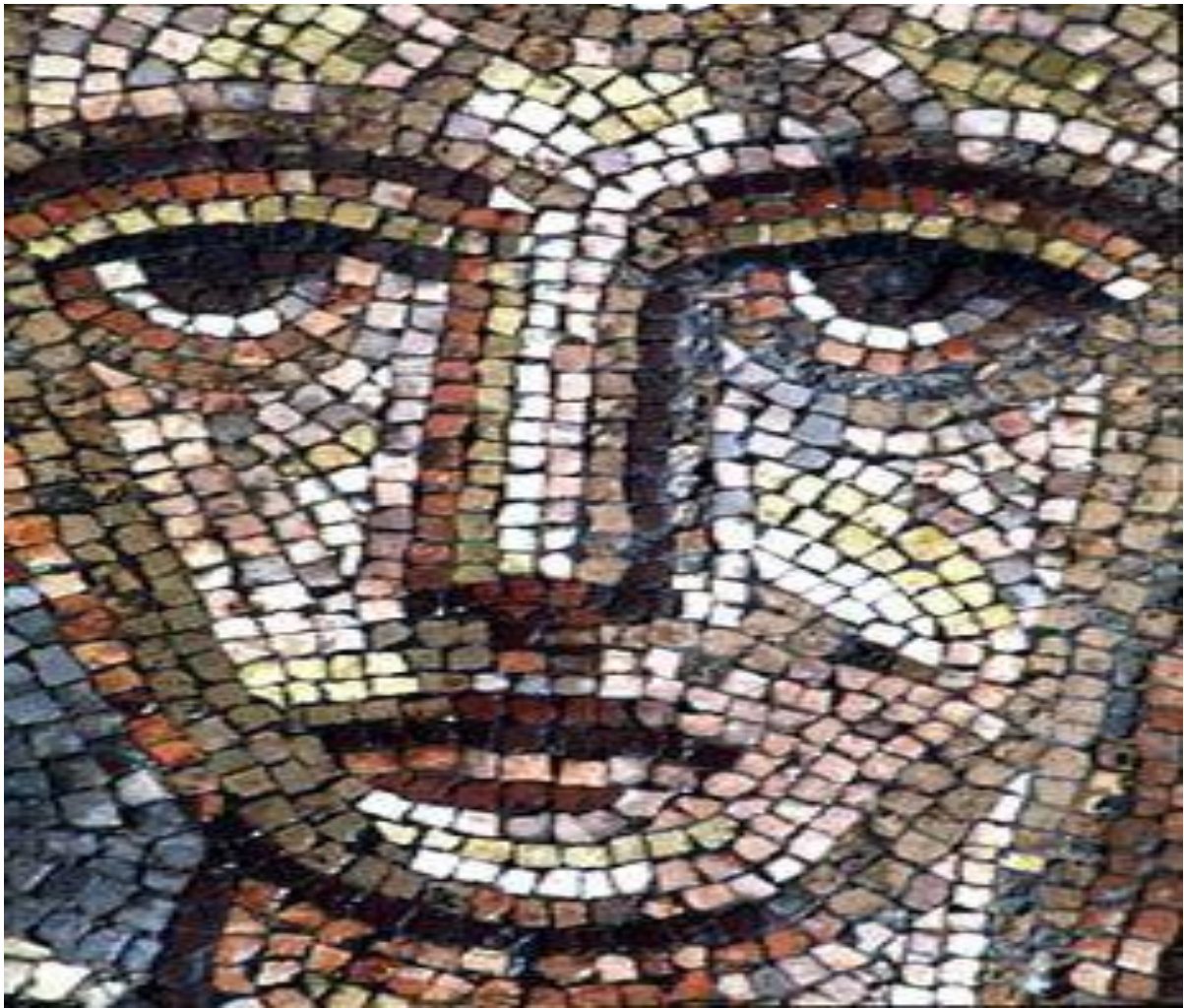




Why we should be Proud of the UK's Recycling Industries Achievements



The History of Recycling



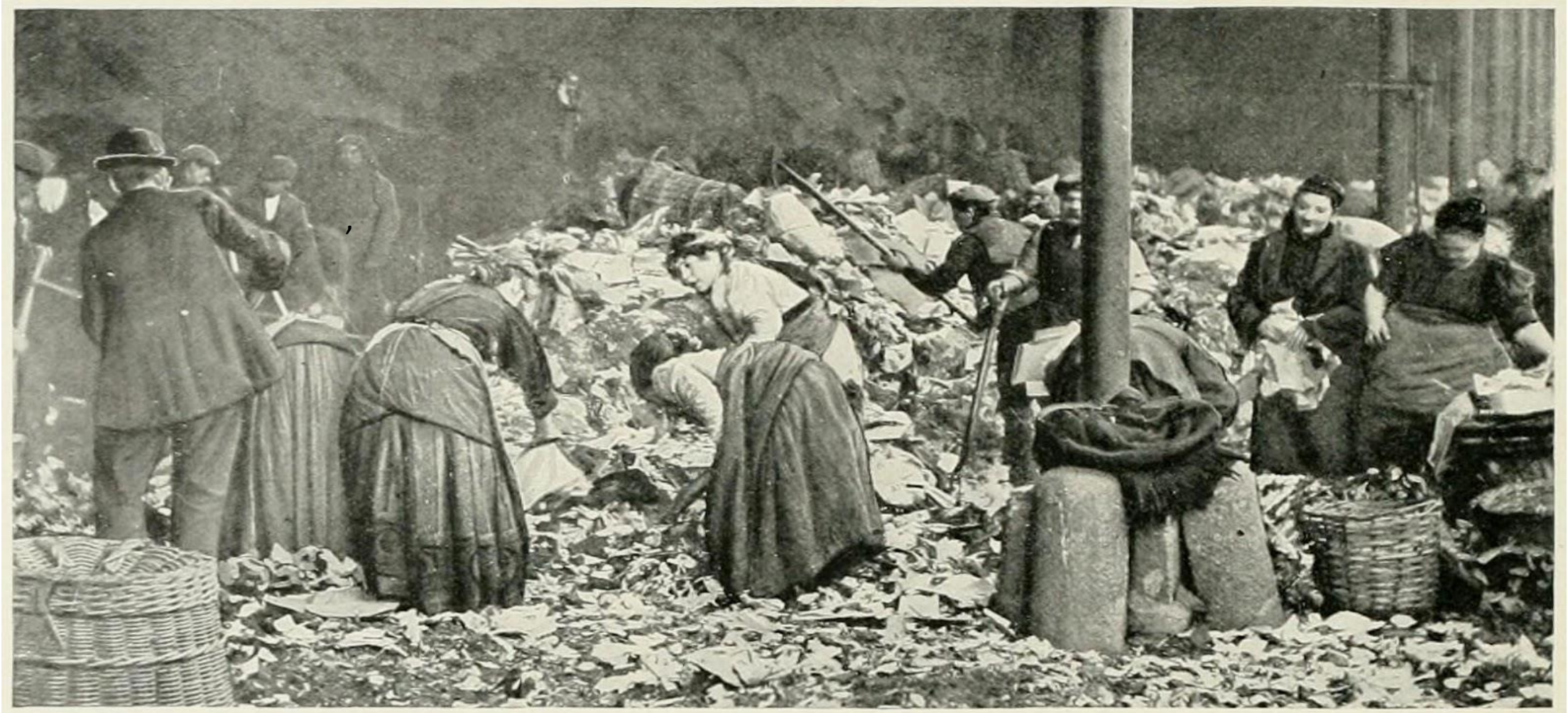
The Advent of mass-production.

- Previously goods often made by hand which was time consuming and consequently expensive – repair, re-use and eventually recycled.
- Industrial revolution saw mass production – cheaper to replace than repair
- Wartime and periods of financial depression saw greater levels of re-use and recycling return
- Post war saw mass production return with a vengeance
- World waste levels doubled between 2002 -2012 from 600 million tonnes to 1 billion tonnes
- By 2025 waste levels expected to double again.



Early examples of recycling in the UK

Sorting a dust-heap at a County Council depot from
London's Toilet



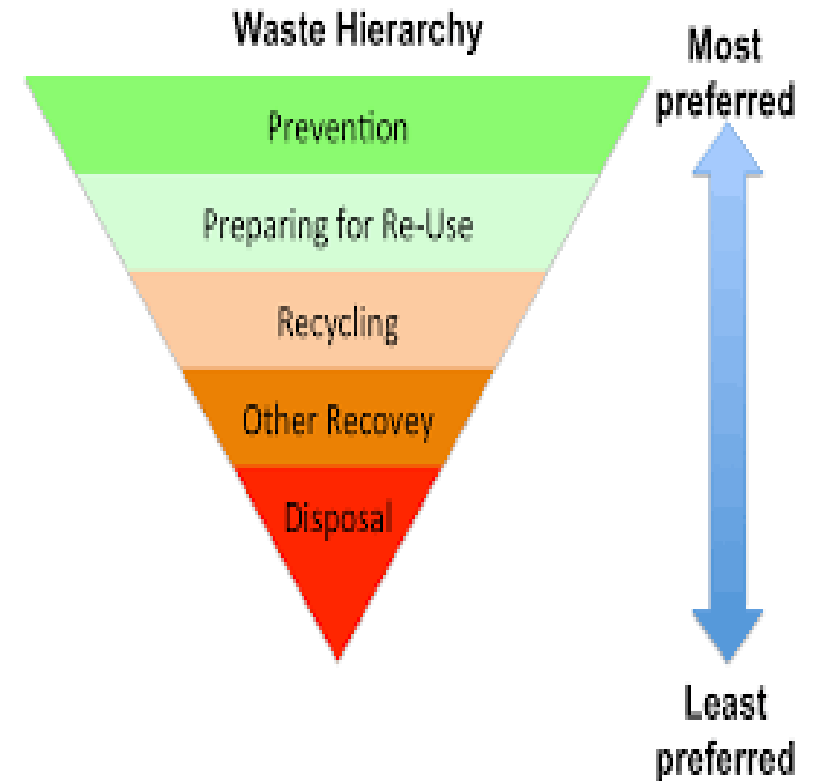
When did recycling really begin in the UK?

- Bottle deposit schemes -1960's
- UK's first bottle bank – Barnsley 6 June 1977
- Paper recycling banks 1980's
- Charity textile and book banks
- HWRC developed – good return on materials collected
- Recycling collection rounds began to appear in the 1990's.
- Waste strategies and national and European Union legislation introduced.
- 2003 Household Waste Recycling Act.



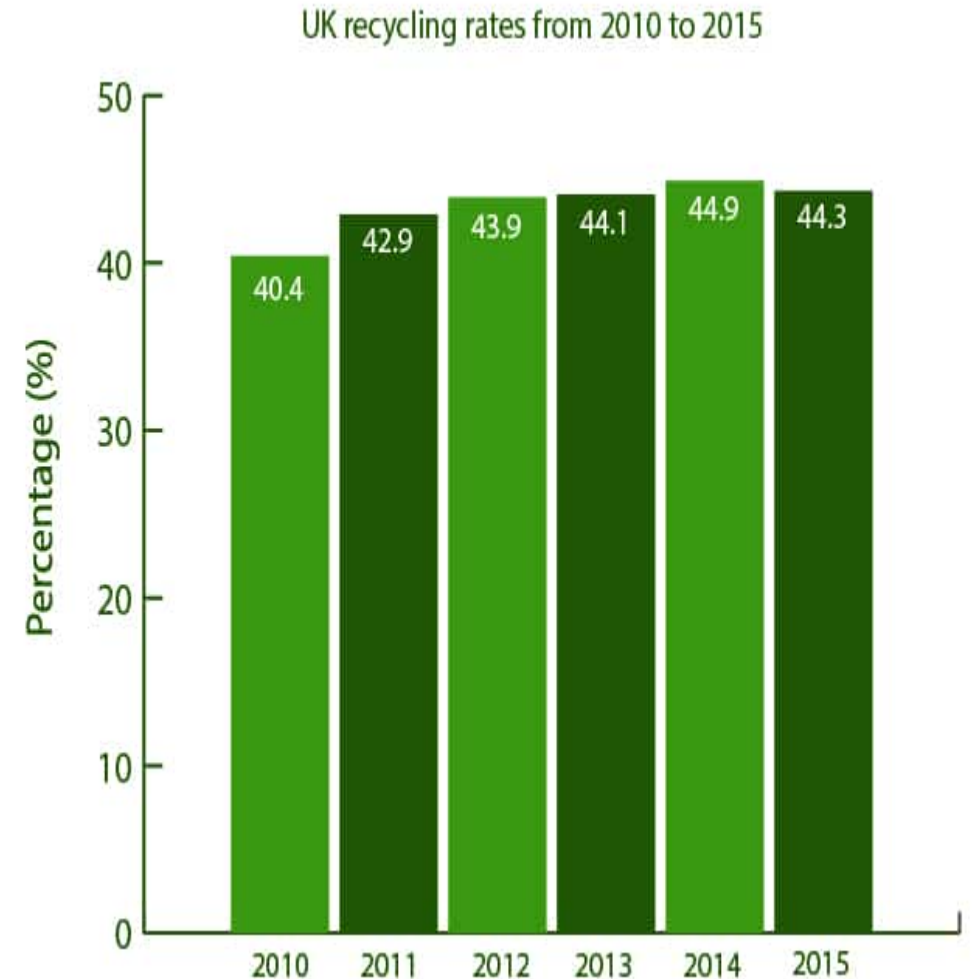
Developing a Waste Hierarchy

- Prevent, re-use, recycle, recovery and disposal.
- Restrict landfill – recycle more
- Applies to residents and businesses alike.
- Producer Responsibilities/ Ease of dismantling & recycling/End of Life responsibilities/greater variety of domestic recycling collections/Landfill tax/charges on carrier bags
- Recycling targets based on weight not material type.
- Different targets across UK with different penalties for failure to achieve.



The State of UK Recycling

- UK Recycling rates rose faster than any other country 2000-2010.
- 2001 average was 12% - 39% by 2010 European average
- EU target of 50% by 2020
- UK recycling rates began to slow down after 2010.
- First fall in UK recycling rates reported in 2015.
- **Wales and Scotland reported slight rises.**
- Likely UK will miss 50 % Recycling rate by 2020



Causes of decline – 'The Perfect Storm'



- Budget cuts to local authorities
- Declining commodity markets for recycled materials
- WRAP main government body charged with driving up recycling rates seen almost 50% funding cut.
- Infrastructure development and communication programmes seriously affected.
- Residents still confused about what goes in recycling bins.
- Recycling 4x's what we did in 2000 but dip shows more needs to be done.



The China connection

- Slowing economic growth has led to decrease in demand for recyclable wastes
- Quality of material sent for recycling now being called into question
- Quantity often the driving force to meet targets e.g. paper
- Standard of materials collected not always a consideration
- China's Green Fence Policy 2013 - 1.5% contamination limit – **now 0.3%!**
- 2015 8m tonnes of paper collected of which 3 million reprocessed in UK
- 5 million tonnes exported (3.7 million tonnes sent to China)
- **Complete bans on mixed paper imports/post-consumer plastics**
- **UK sends 1.1 million tonnes of paper and 25% of collected plastics to China.**
- China now more resource efficient – circular economy approach.
- China now sources 35% of its fibre needs internally.

What caused the 'Green Fence'?



Moves to improve quality

- Contamination is a major issue for recycling collections.
- Still a good deal of confusion amongst the public.
- Source separate collections one option – costly but higher value of materials collected
- TEEP Regulations aim to ensure co-mingled deliver quality materials
- APSE survey found 85% of local authorities use co-mingled collections
- MRF Regulations demand better quality inputs to ensure quality materials are sent to reprocessors
- Poor quality inputs to MRF means loads rejected, increasing gate fees and potential landfill costs
- Some LA's now reconsidering co-mingled due to need to get income and avoid increased disposal costs.
- Need to improve quality of materials being put out for recycling.



The role of local authorities

- Quality material is now critical both regards both input and output.
- Need to reduce contamination – separate/co-mingled collections
- Human needs - communication and simplicity
- Collection infrastructure
- More effective input/output contracts – quality agenda
- Improved processing technology – optical sorting at MRF's
- Supporting national and regional campaigns
- Regional working – sharing costs and assets
- Support and promote local recycling businesses



The Benefits

- Greater capture of higher quality materials = greater values
- Reduced rejection levels
- More effective MRF's
- Opportunity to offer quality materials to local processors may result in local business development.
- Better quality materials more attractive on dwindling world market.
- Better understanding and involvement from residents – 'real value of waste'
- **UK Recycling industry back at the top of the pile!**



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