Be part of the conversation!
Follow APSE on Twitter and LinkedIn

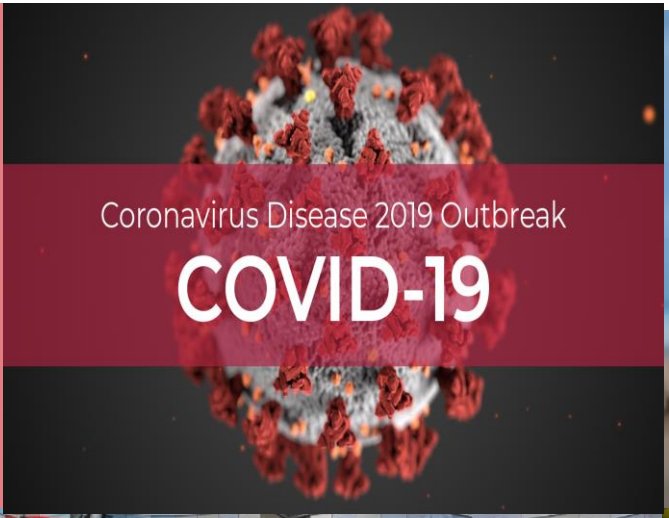
@apseevents
@apsenews

@APSE - Association for Public Service Excellence

apse seminars

APSE State of the Market Report 2021

Refuse Collection and Recycling



All Change

Resources and Waste Plan (January 2021)

‘preserve material resources by minimising waste, promoting resource efficiency and moving towards a circular economy’

‘minimise the damage caused to our natural environment by reducing and managing waste safely and carefully, and by tackling waste crime’.

- 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
- Still 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.

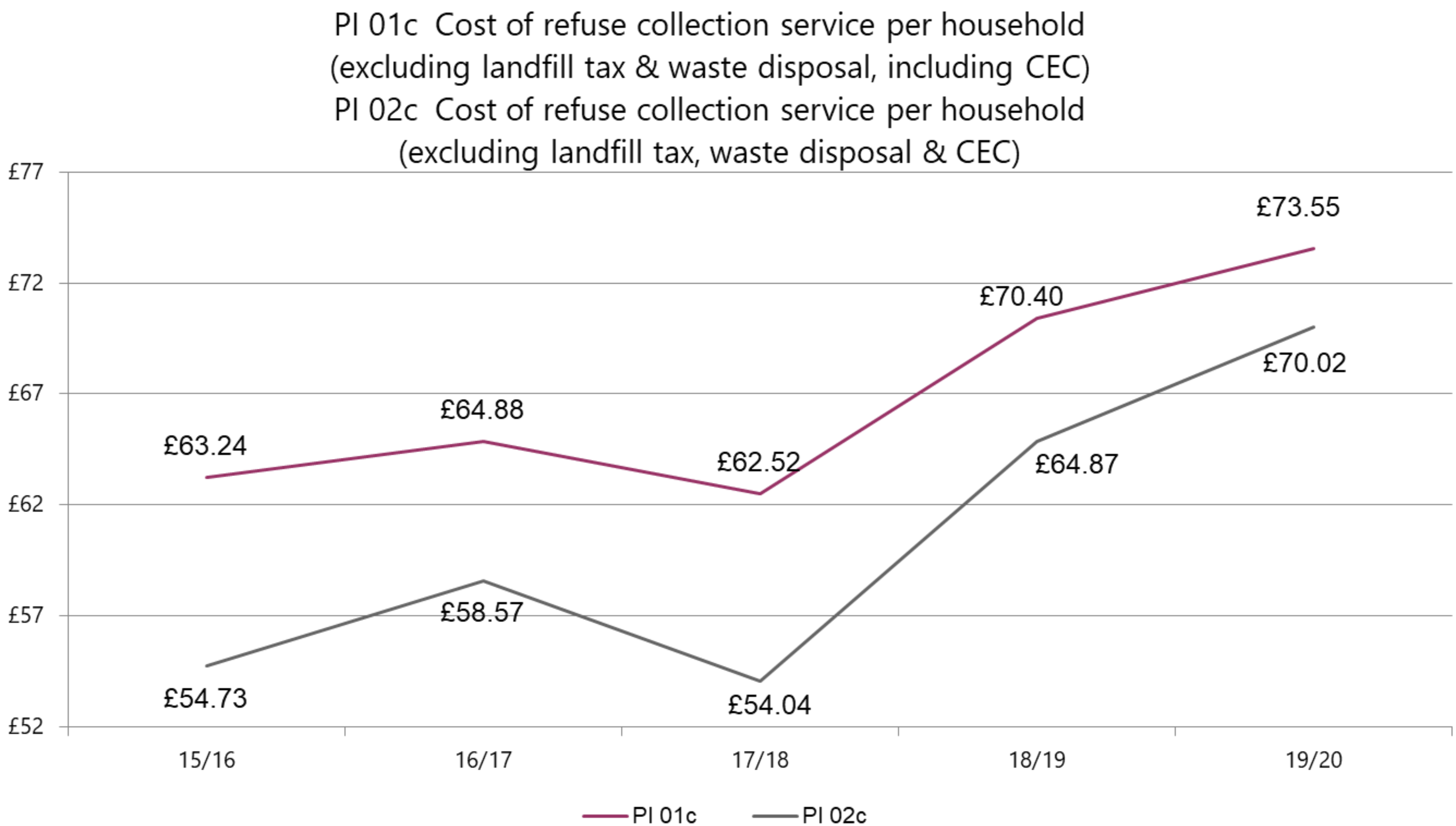
Proximity principle: UK recycling infrastructure opportunities, reduced reliance upon overseas market.

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

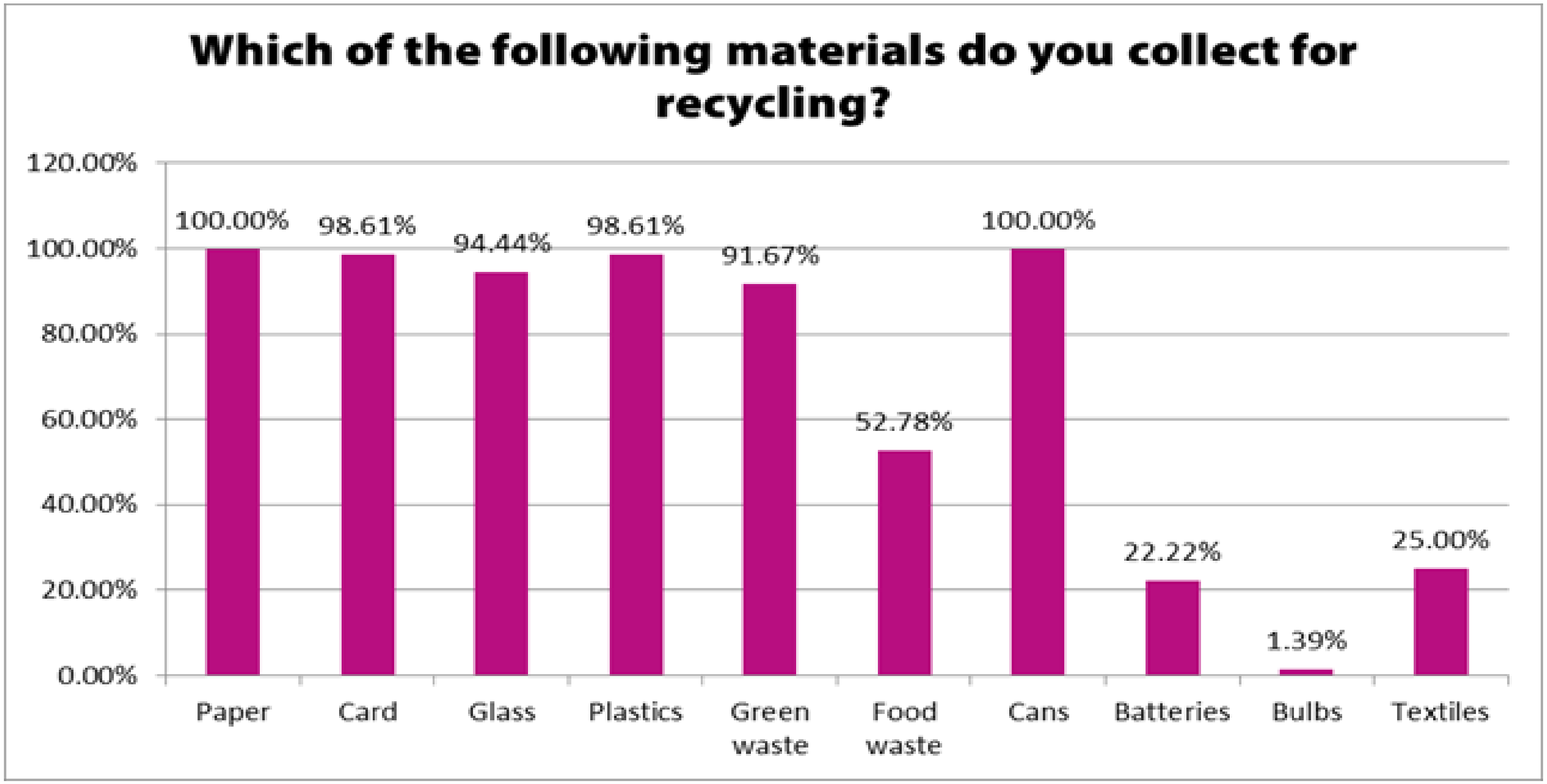
State of the Market Surveys

- State of the Market Survey 2021
- Local authority service areas
- Similar questions are asked to allow for trend comparisons
- COVID-19!
- 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
- 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

- 19% weekly,
- 72.5% fortnightly
- 7% three weekly,
- 1.5% four weekly.

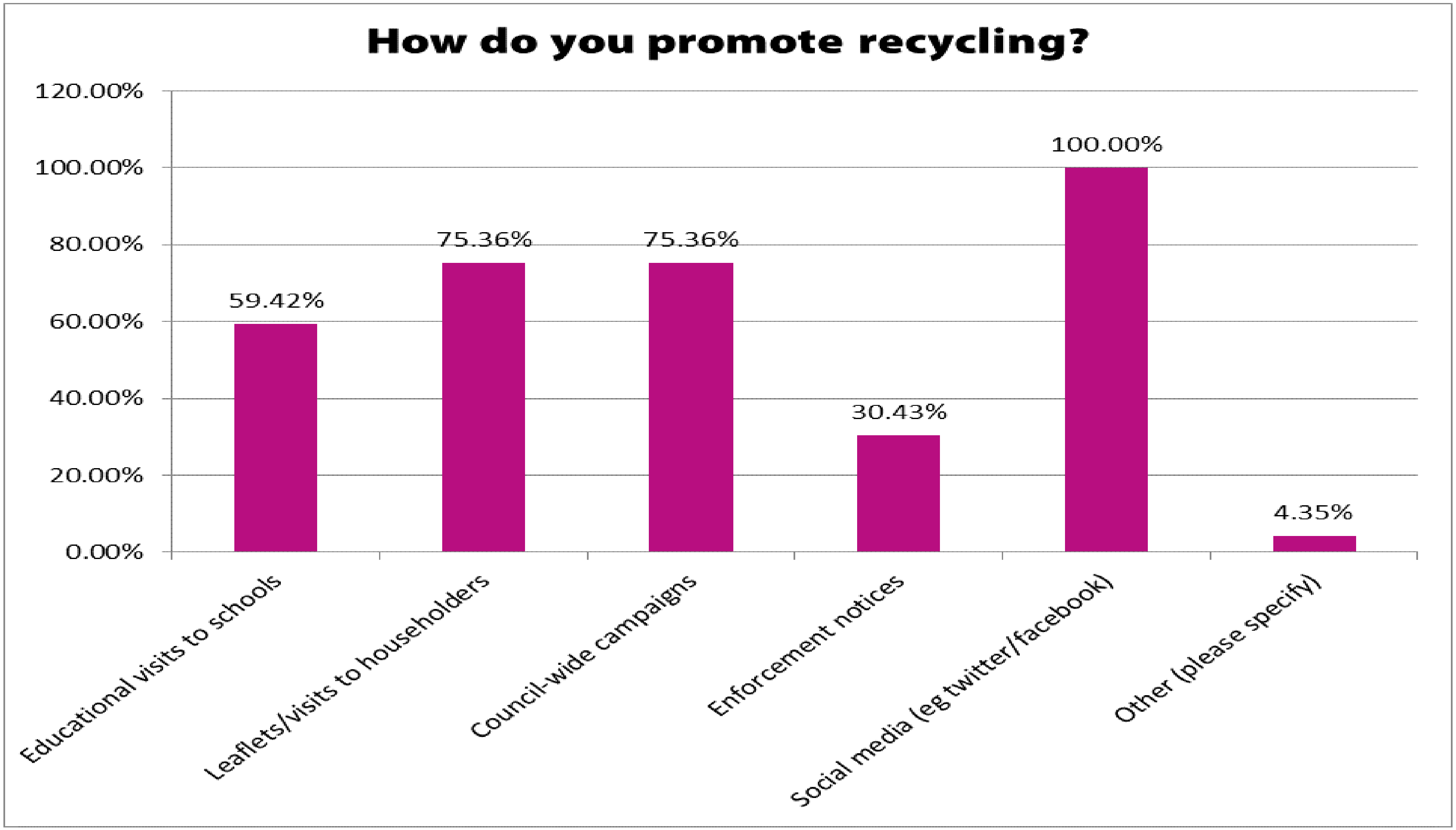
CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections now the norm
- growing numbers introducing three weekly residual collections.
- 15% of local authorities looking at introducing four weekly residual collections.

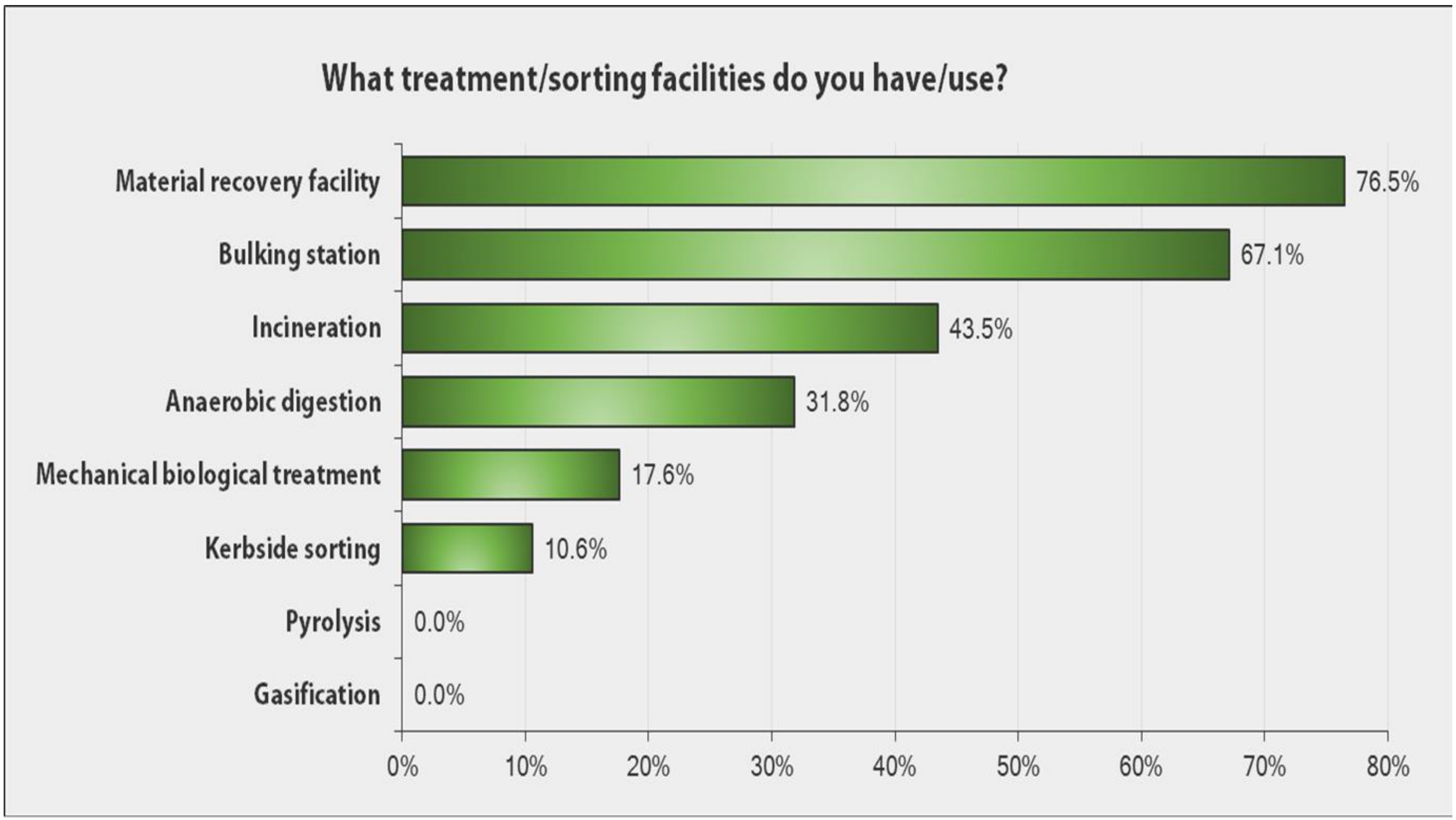
Collection Methods

- 58% Operate ‘task and finish’
- 28% use zonal working systems
- 43% use 5 day working week / 34% use a 4 day working week
- 70% have co-mingled collection system (64% in 2020)
- 18% operate source segregated collections
- 19% have a mixture of separate material collections and co-mingling.

Promoting recycling

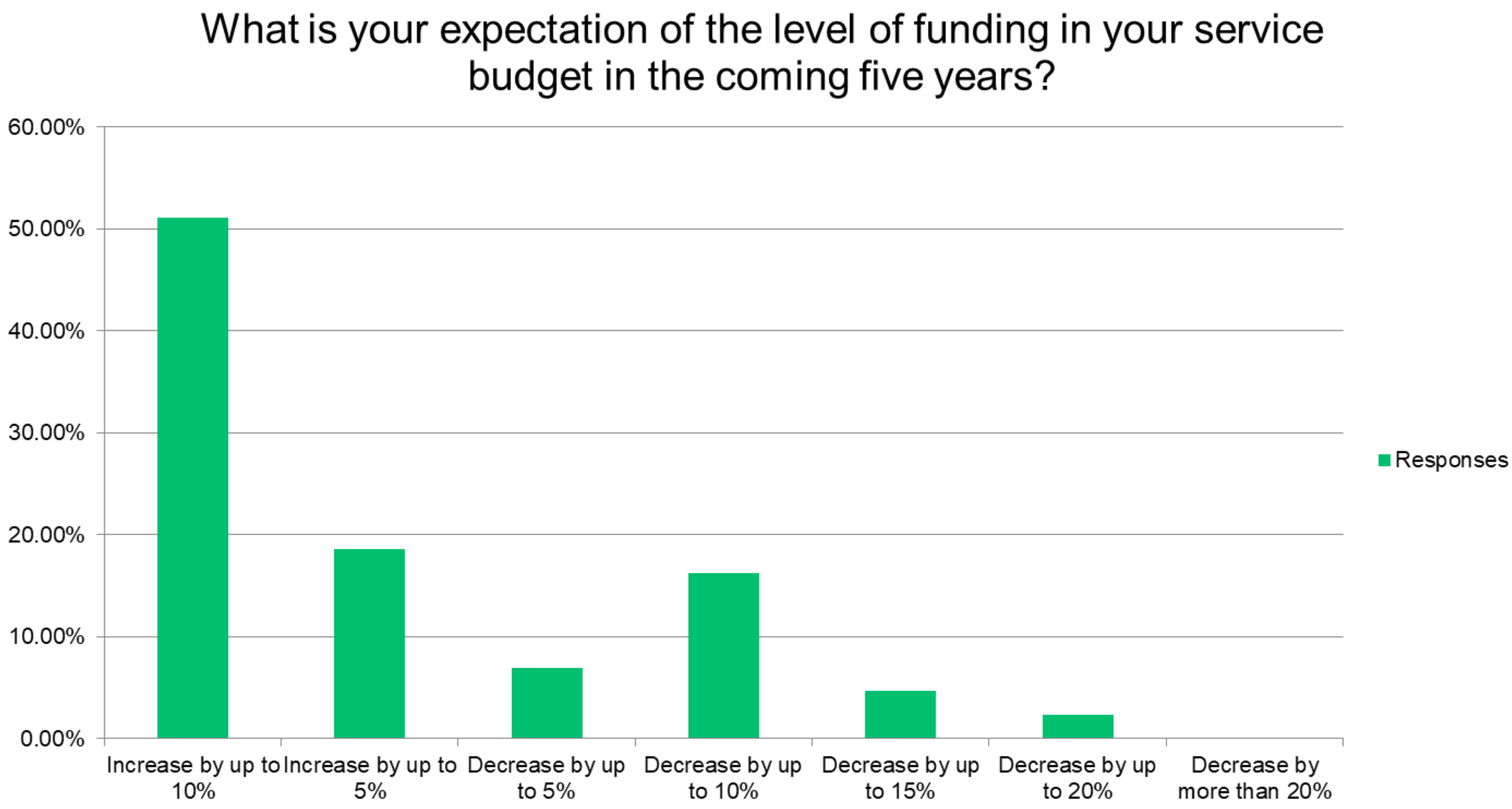


Waste Treatment Facilities



apse seminars

Budget Changes

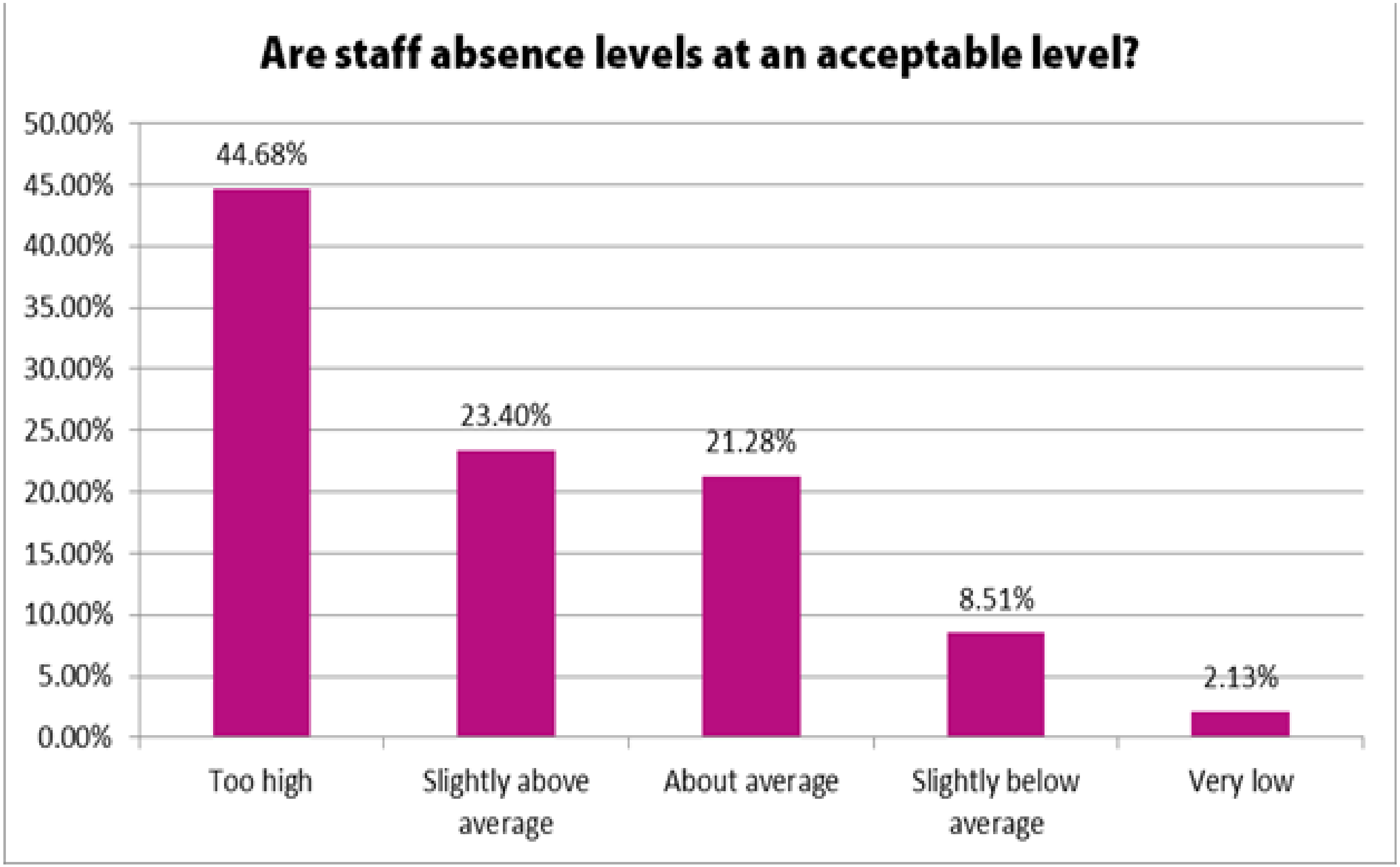


Staffing Levels – next 12 months

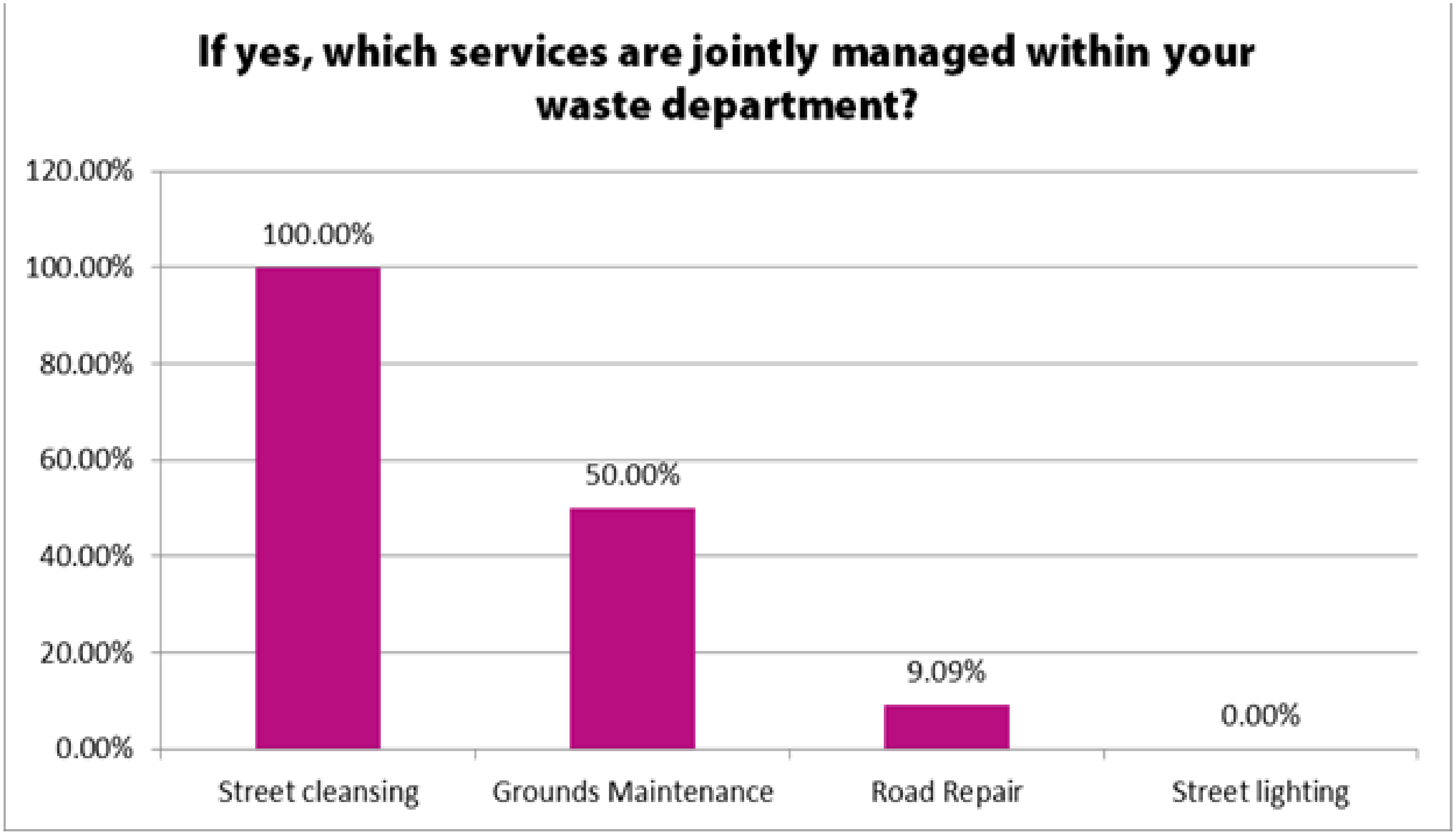
Answer Options	Results from 2021	Results from 2020	Results from 2019
Natural wastage	10.2%	17.2%	18.1%
Recruitment freeze	10.2%	12.1%	7.5%
Voluntary redundancy	6.1%	10.3%	12.8%
Compulsory redundancy	4.1%	1.7%	3.2%
None of these	81.6%	72.4%	74.5%

apse seminars

Staff Absence Levels



Jointly managed services with waste



In-House vs external provision

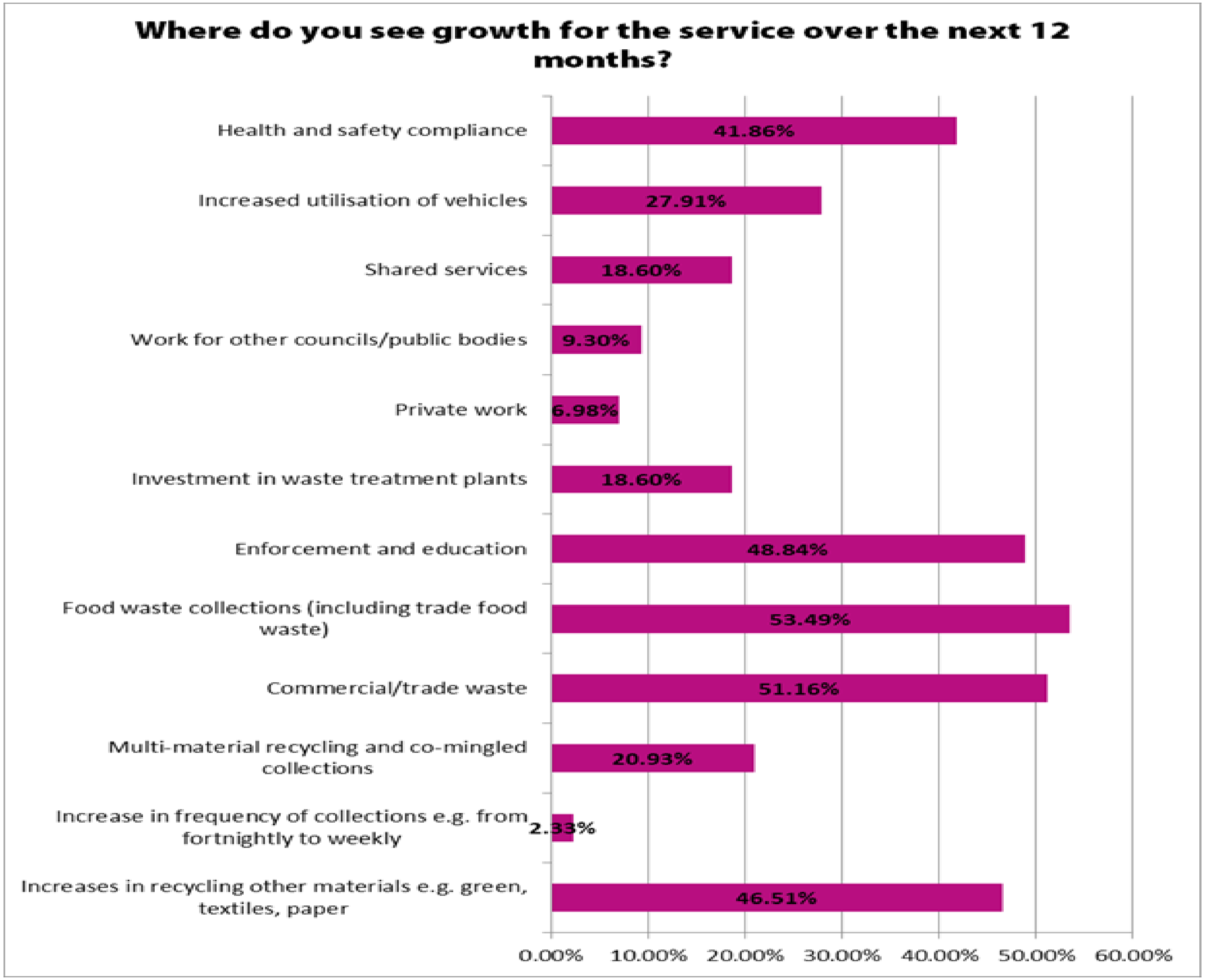
SERVICE PROVISION

- 82% provide services in-house.
- 18% externally provided

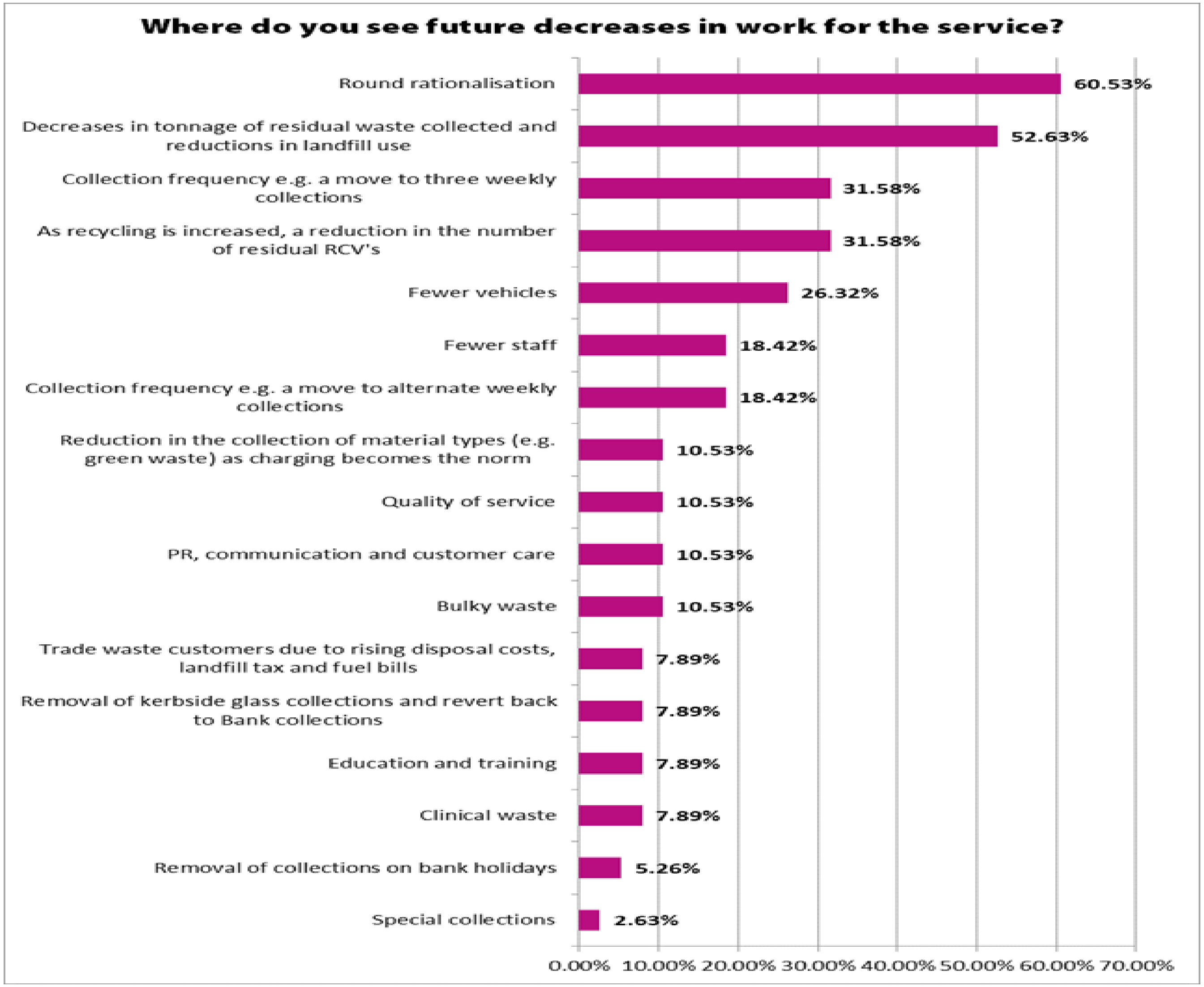
CONTRACT LENGTH

- 10+ years = 42%
- 7-10 years = 17%
- 7 - 5 years = 17%
- Up to 5 years = 24%

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, hand helds.
- Reducing reliance on agency staff through work planning improvements Reviewing staff and vehicle levels
- Cross boundary working

apse seminars

Service Reviews – Current or Proposing

34% completed review
32% review underway
26% Planning a review

Route optimisation	**77.50%**
Service re-design	62.50%
Utilisation of vehicles	52.50%
Review of working time/rota's	50.00%
Review of productivity/work study	42.50%
GPS tracking	30.00%
Income generation capacity	30.00%
CRM handhelds	25.00%
Eco drive vehicle monitors	20.00%
Other (please specify)	20.00%
Using systems thinking techniques	10.00%

Impacts of COVID

- Most councils concentrated on delivering residual and commercial waste collection early on in the pandemic but gradual improvement to re-introduce recycling services.
- Green waste and bulky household waste main service suspended
- HWRC's re-instated but some operating on appointments only basis.
- Monthly losses of external income now under 10% as businesses have started to re-open – large minority still losing up to 20%
- Staff absences are now returning to a more expected level through vaccination programme and better health and safety measures.
- 50% of respondents reported increased costs over last 12 months of around 10%, 35% reported increased costs of up to 20% -
- Additional costs related to: extra staff/vehicles, PPE, increased cleaning costs/sanitising materials.
- Increased landfill costs expected as more residual waste collected and difficulties with recycling processors.

Conclusions

- Resource and Waste Strategy implications new focus of work
- Promise of additional funding in order to meet strategy requirements
- **ONGOING IMPACTS OF COVID UNKNOWN**
- 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 53% collecting food waste.
- Level of cuts not as high as expected – growth predicted by over half of respondents
- In-House provision has risen
- 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

- Contact details
- Wayne Priestley
- Principal Advisor

- Email: wpriestley@apse.org.uk

INVESTOR IN PEOPLE
GB 11409 GB 11132 GB 14074

Association for Public Service Excellence
2nd floor Washbrook House, Lancastrian Office Centre, Talbot Road,
Old Trafford, Manchester M32 0FP.
telephone: 0161 772 1810
fax: 0161 772 1811
web: www.apse.org.uk

NEW MUNICIPALISM

Delivering for local people and local economies