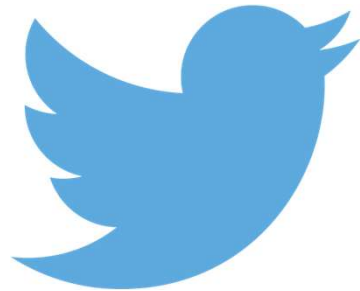




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Waste and Recycling – State of the market

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An overview

- Geopolitical context
- UK Wide Political Context
- Scotland Perspective
- Workforce Matters



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Geopolitical context





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Scottish Government

- The Scottish Government's waste policy aims to reduce waste, increase recycling, and minimize landfill usage.
- Key targets include reducing overall waste by **15%** by 2025 compared to 2011 levels
- Recycling **70%** of remaining waste
- Sending no more than **5%** to landfill.
- Focus on reducing food waste by **33%** compared to 2013 levels



Consultation: Landfill

- Landfill Ban: Ending the landfilling of biodegradable municipal waste (BMW) by 31 December 2025
- Landfill methane still accounts for 78% of waste sector emissions (excluding energy-from-waste facilities)



Review of Rural Food Waste Collection Exemption

- Should the exemption be modified, removed, or replaced with alternative measures?
- The feasibility of expanding food waste collection infrastructure in rural areas?

Textile Waste Management

- Only 4% of Scotland's household waste by weight, textiles contribute 32% of household waste carbon emissions.
- Enhance textile recycling and reuse to prevent textiles from becoming waste?
- Would kerbside collection be beneficial.
- Improve textile recovery at Household Waste Recycling Centres (HWRCs).



Household waste, recycling and waste infrastructure

- Improving Household Recycling and Waste Management
- The right waste management infrastructure including capacity at facilities and potential upgrades
- Landfill diversion? Avoiding increases in fly tipping.



APSE State of the Market Findings

- Task and finish work down to **38%** from **43%**
- **15%** use zonal working (all waste from one zone on the same day).
- **57%** operate a 5-day week
- **26%** continue to operate a 4- day week.
- Under **5%** of containers are replaced each year
- **60%** operate co-mingled collection systems
- **72%** do not remove side waste

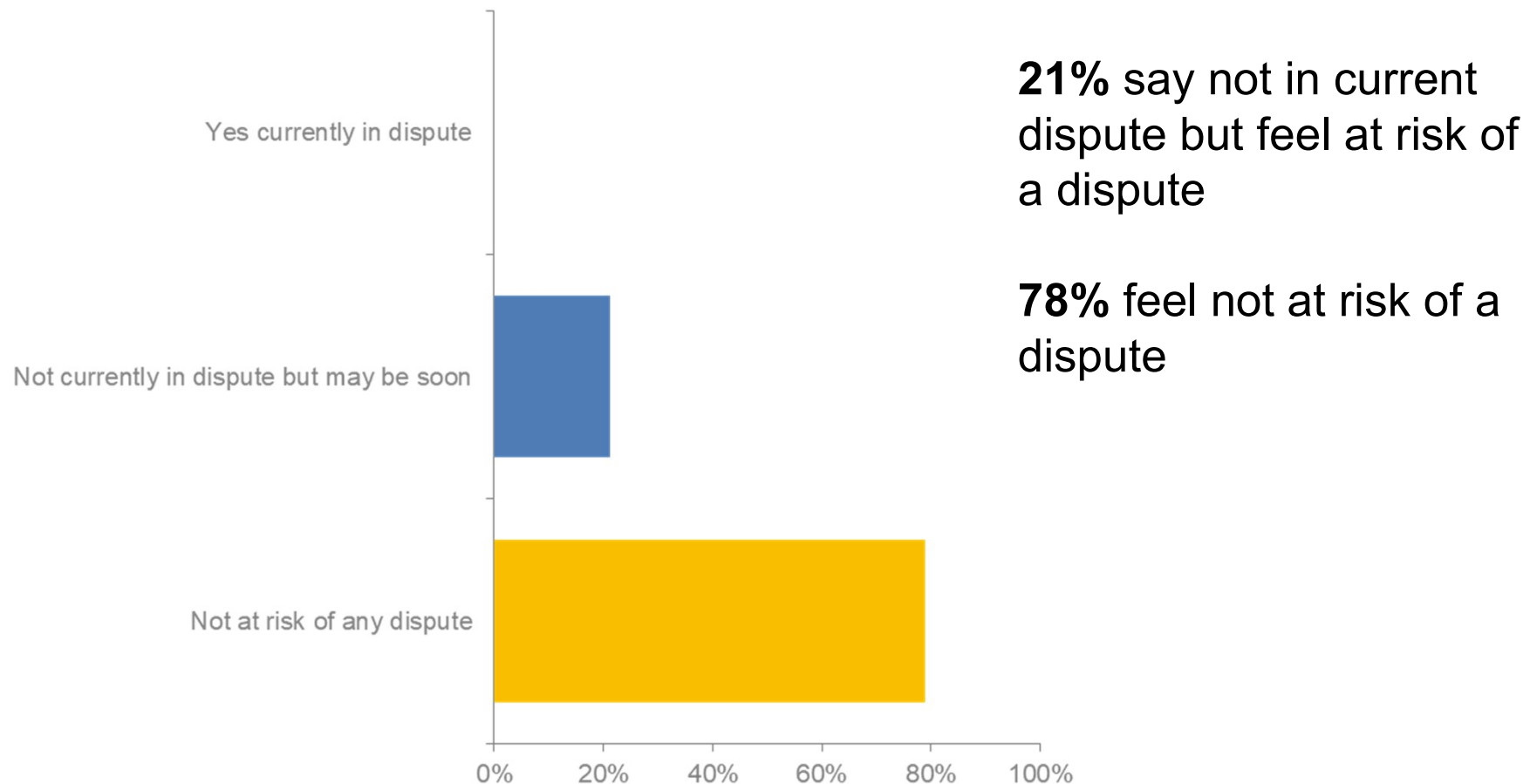


Workforce matters and equal pay

- Birmingham dispute
- Dated 'single status' agreement
- Historic issues unresolved
- Operational and financial pressures on services
- APSE Survey findings

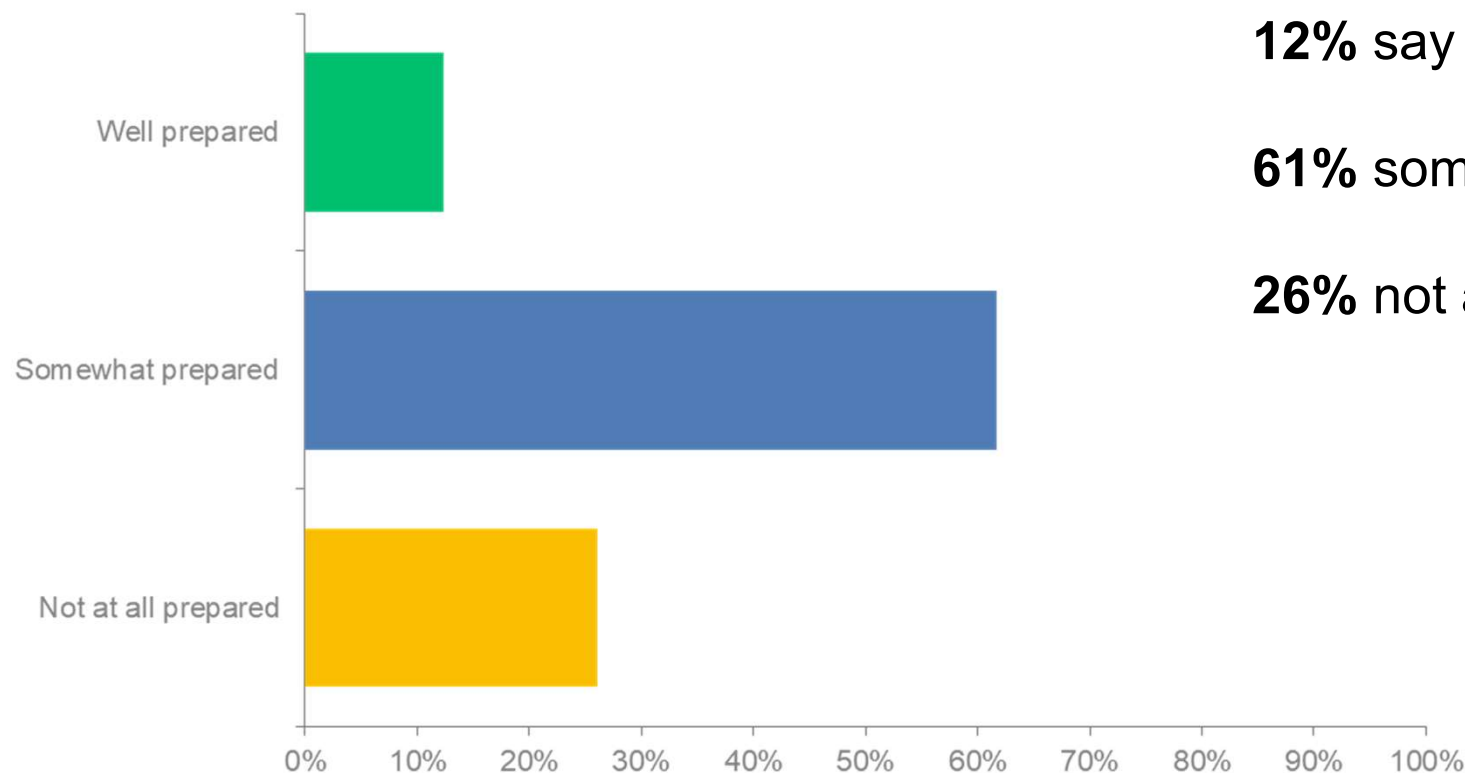


Are you currently facing industrial action?





Do you feel prepared for industrial answer (financial, reputational etc)



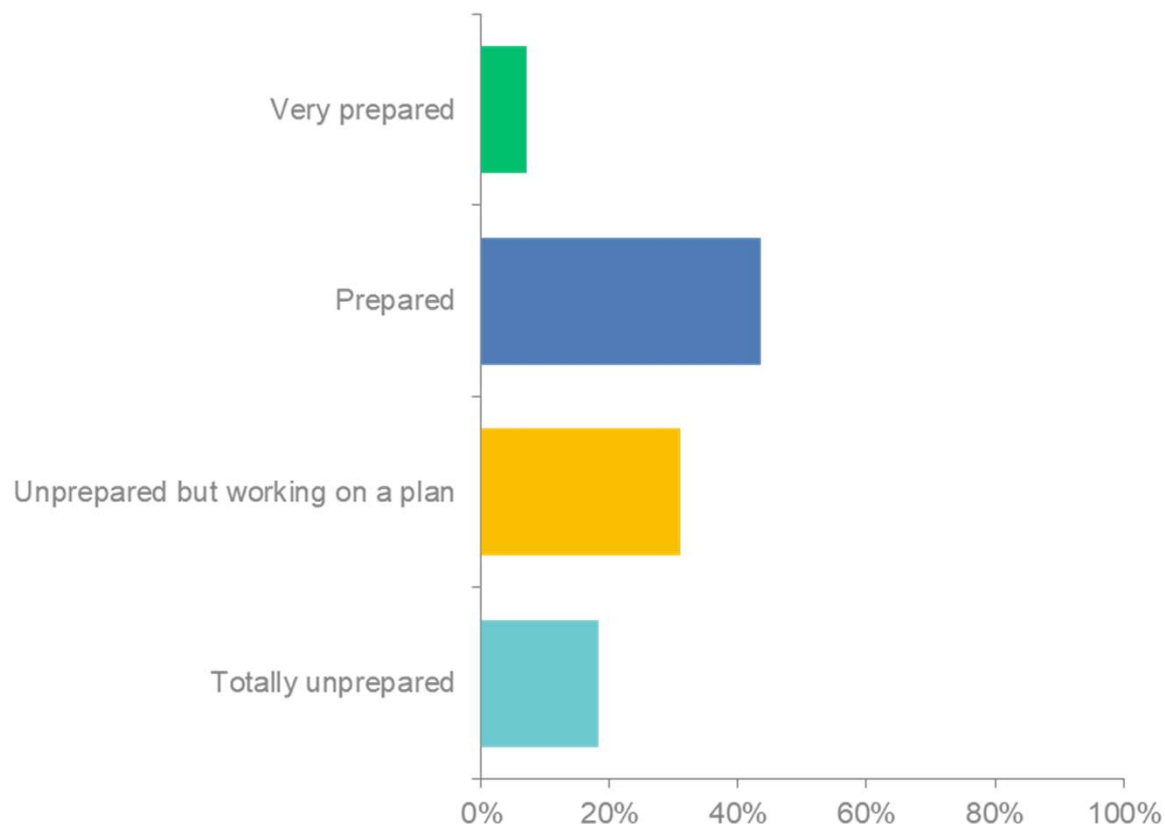
12% say well prepared

61% somewhat prepared

26% not at all prepared



How prepared do you feel for the challenge of Industrial Answered?



5% Very prepared

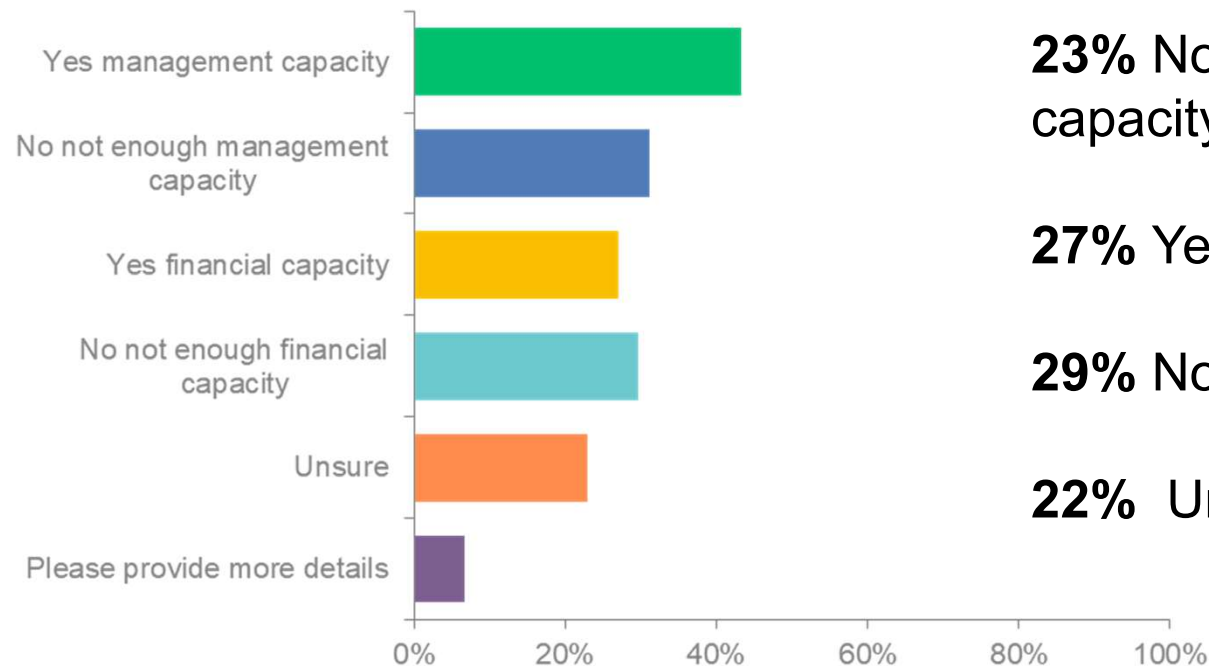
43% Prepared

30% Unprepared but working on a plan

13% Totally unprepared



If industrial action was called do you feel you have sufficient management /financial capacity?



32% Yes management capacity

23% Not enough management capacity

27% Yes financial capacity

29% Not enough financial capacity

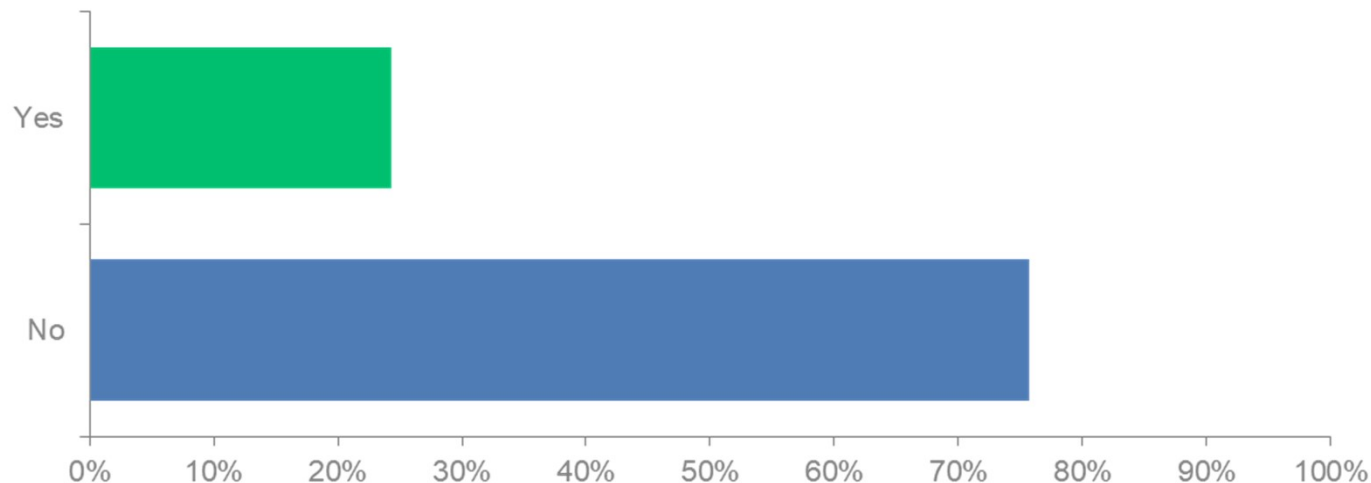
22% Unsure



Do you feel your refuse and waste service could be open to an equal pay challenge?

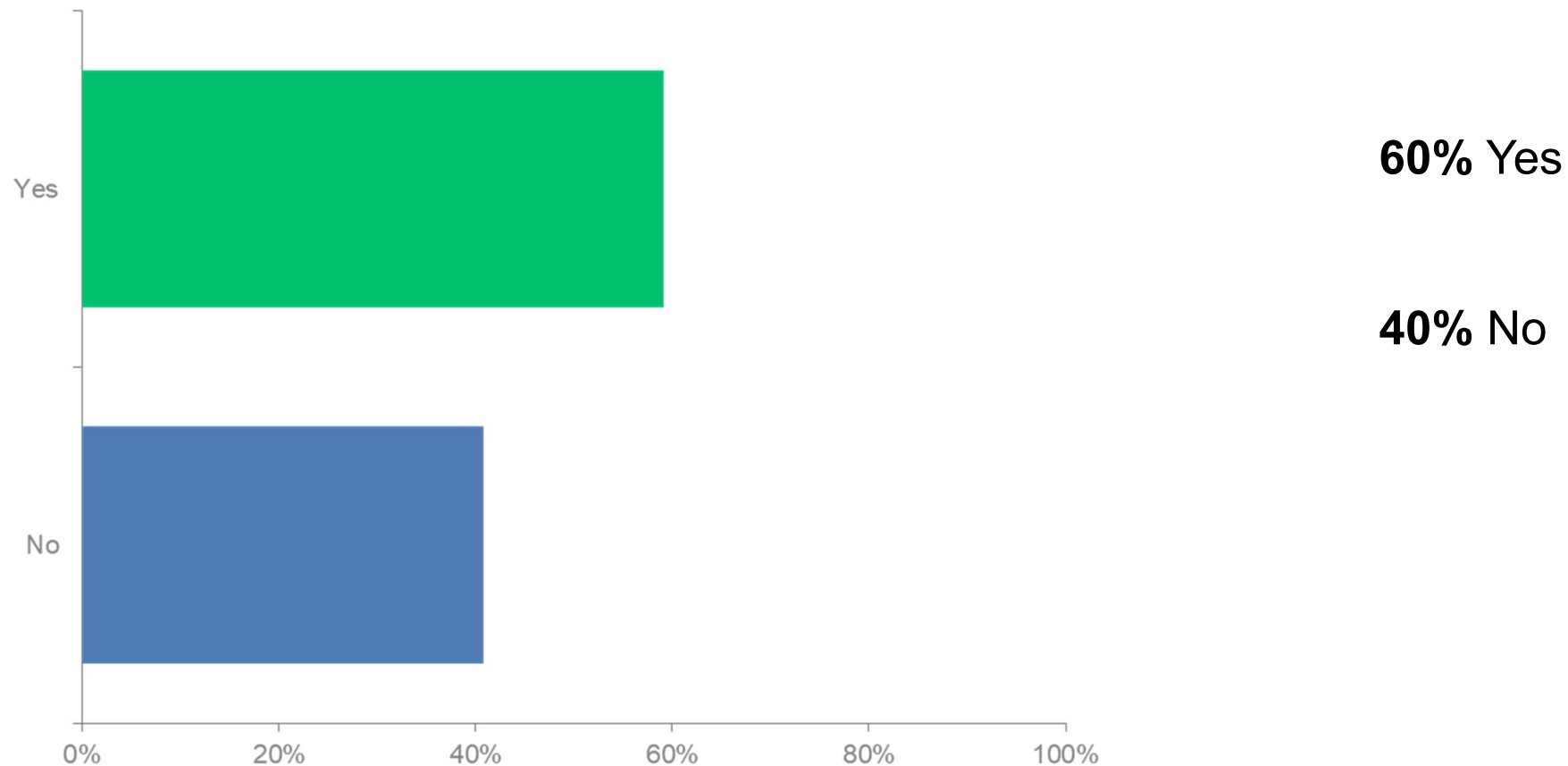
25% Yes

75% No



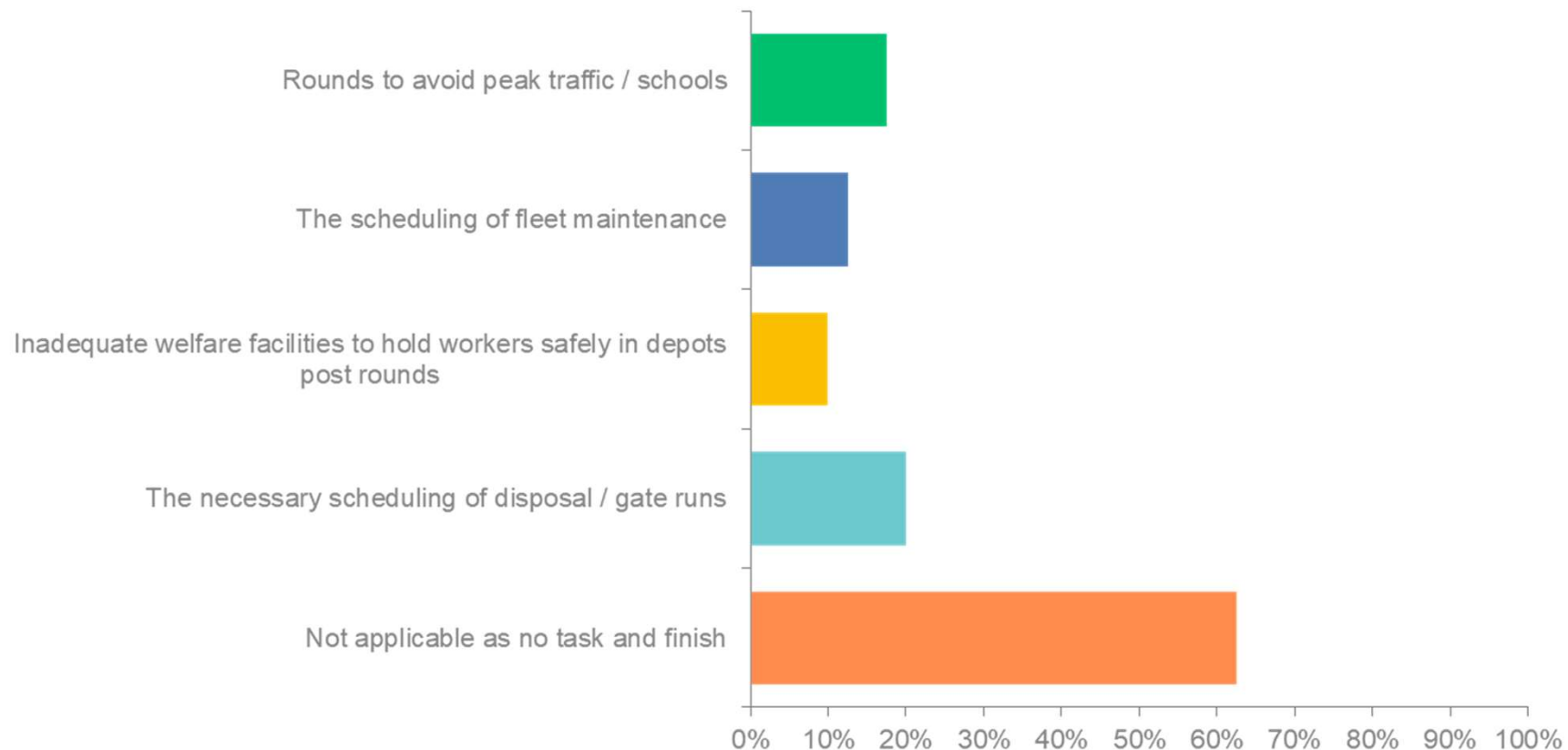


Do you operate task and finish



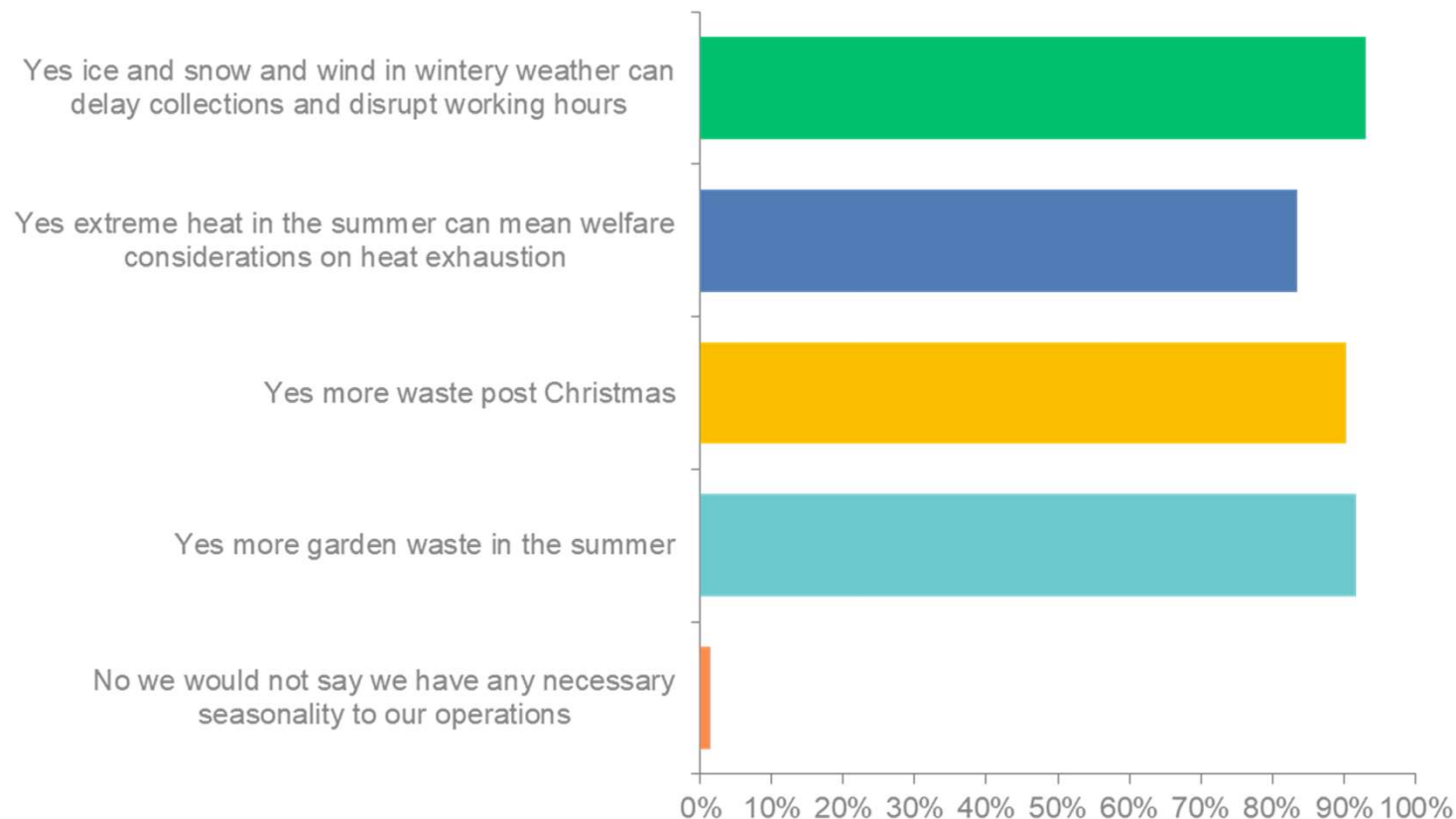


On what grounds would you justify the need to use task and finish?



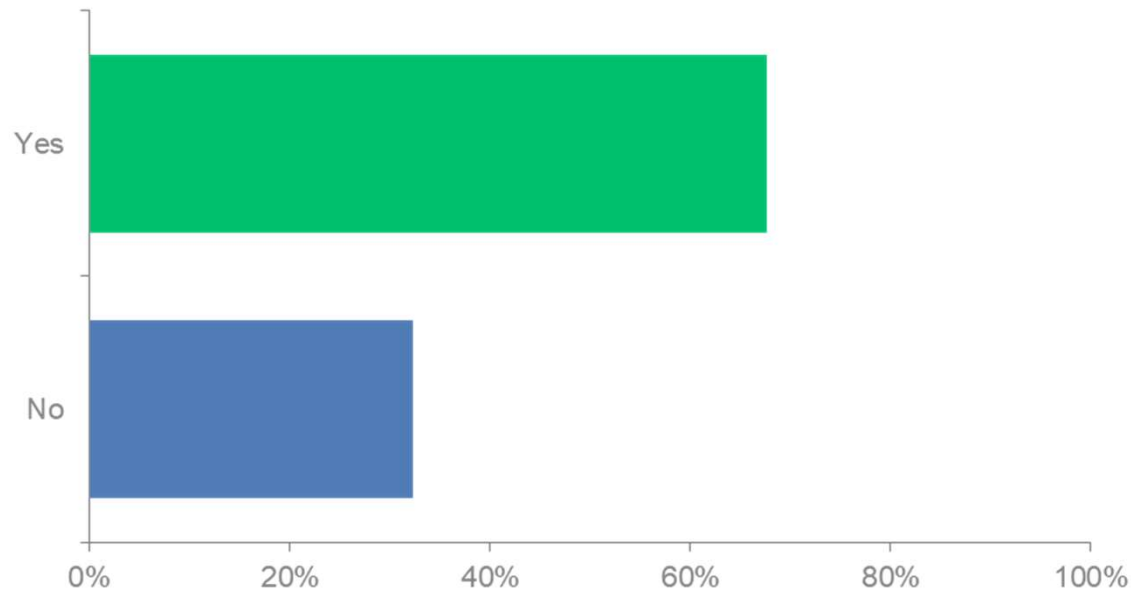


Would you say there is some necessary seasonality to the conditions of the operation





Have you had positive discussions with your trade unions?

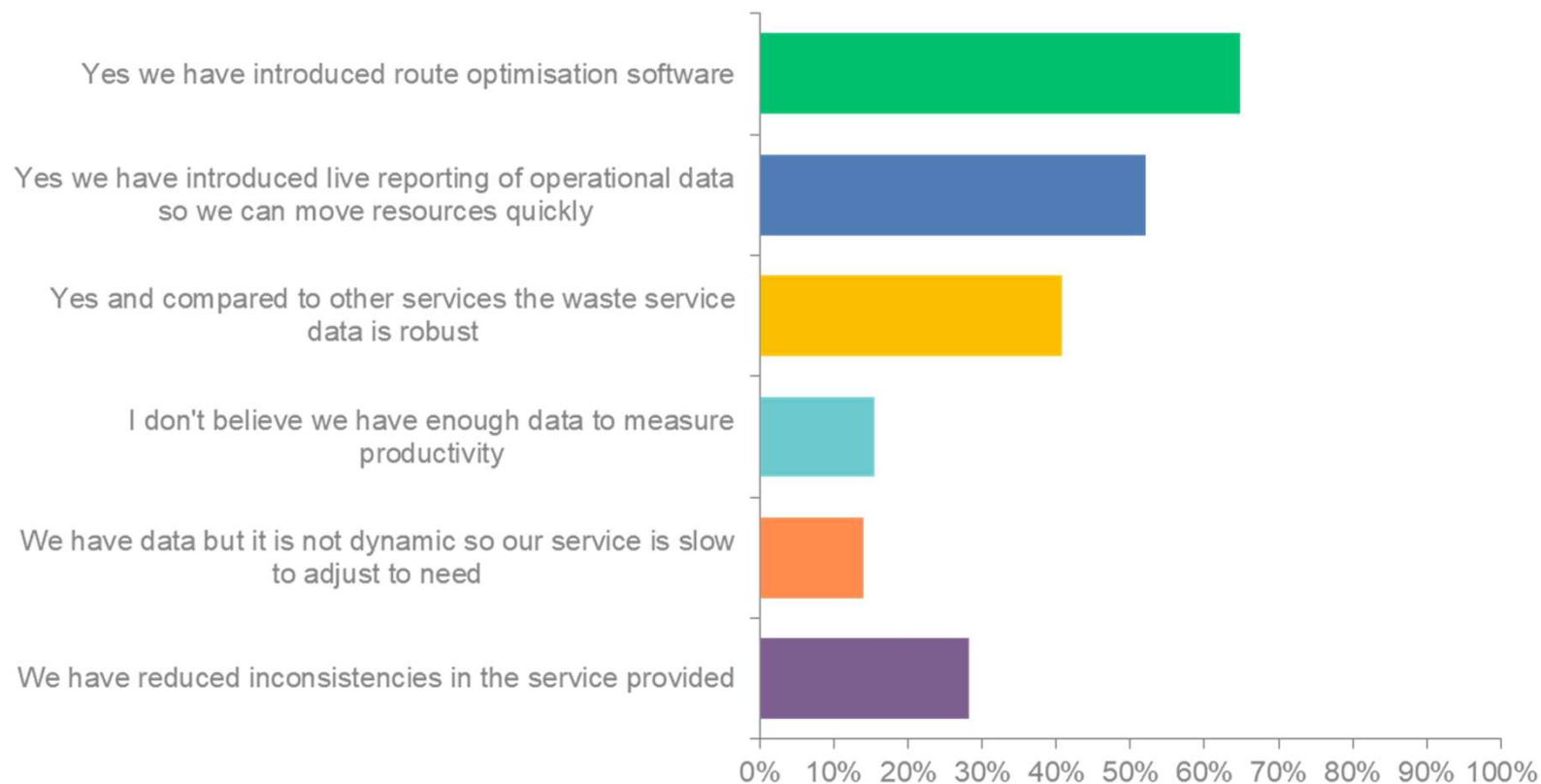


68% yes to positive discussions

21% no



Do you feel your service productivity stands up to scrutiny? You may tick more than one answer





Concluding thoughts

- Challenges old and new
- A constantly improving sector
- A close eye on equal pay
- Ensuring data is evident in your decision making
- Over to you!



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