

# APSE State of the Market Report 2022

## Refuse Collection and Recycling



# Resources and Waste Plan (October 2022)

*'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
- Growing concerns over ongoing lack of funding, increasing timescales, communications, private sector buy-in and current contract arrangements.



# The Bigger Picture

**Better product design:** incorporating, less waste, recyclability, alternatives, increased 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, reduce plastics pollution; low emission/electric refuse collection fleets, improved waste treatment technologies.



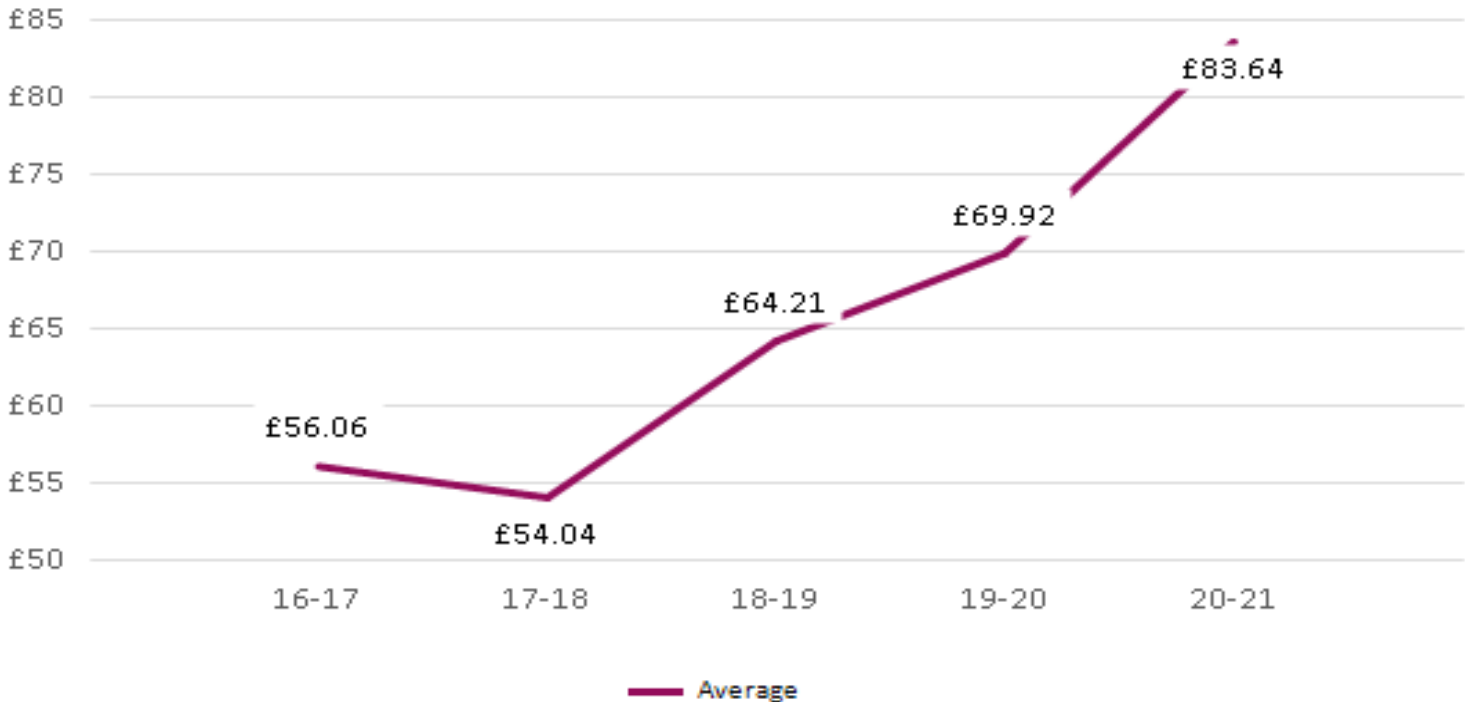
# State of the Market Surveys

- State of the Market Survey 2022
- Opportunity to identify key issues across local authority waste and recycling services
- Similar questions are asked to allow for trend comparisons
- All APSE member authorities across the UK invited to submit.
- Key findings of the survey are expressed in briefing note
- Useful for benchmarking and performance management
- Used by National Government and in APSE research documents
- Results used in National Litter Strategy, HLF reports, Parks Action Group, School Food Plan, Press and trade and national media.



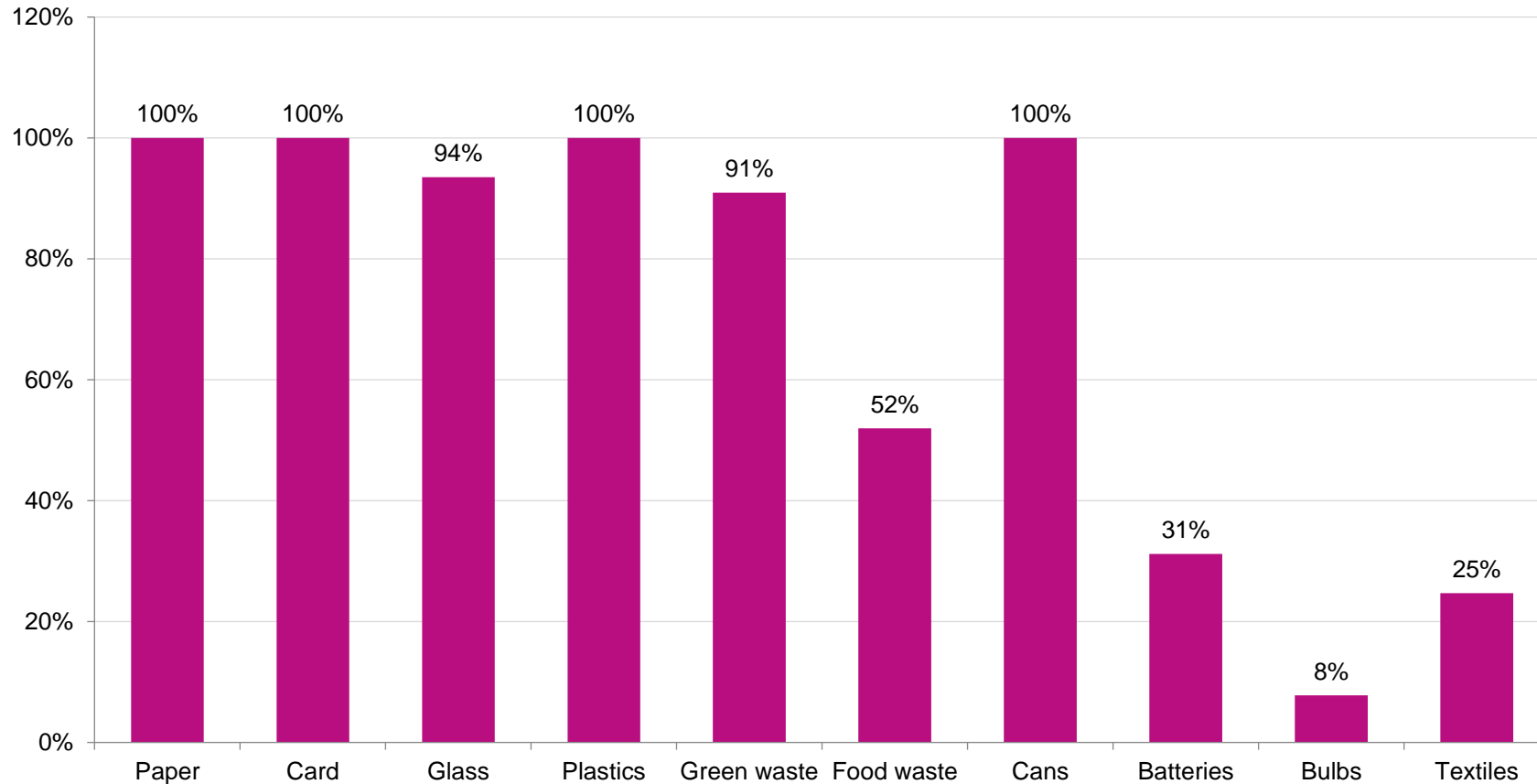
# Cost of Refuse Collection Services

PI02c Cost of refuse collection service per household (excluding landfill tax, waste disposal and CEC)



# Materials Recycled

Which of the following materials do you collect for recycling?



# Collection Frequencies

## CURRENT STATE OF PLAY

Residual collections

- 12% weekly,
- **71% fortnightly**
- 13% three weekly,
- 3% four weekly.

## CHANGES OVER NEXT 2 YEARS

- alternative weekly residual collections now the norm
- growing numbers introducing three weekly residual collections.



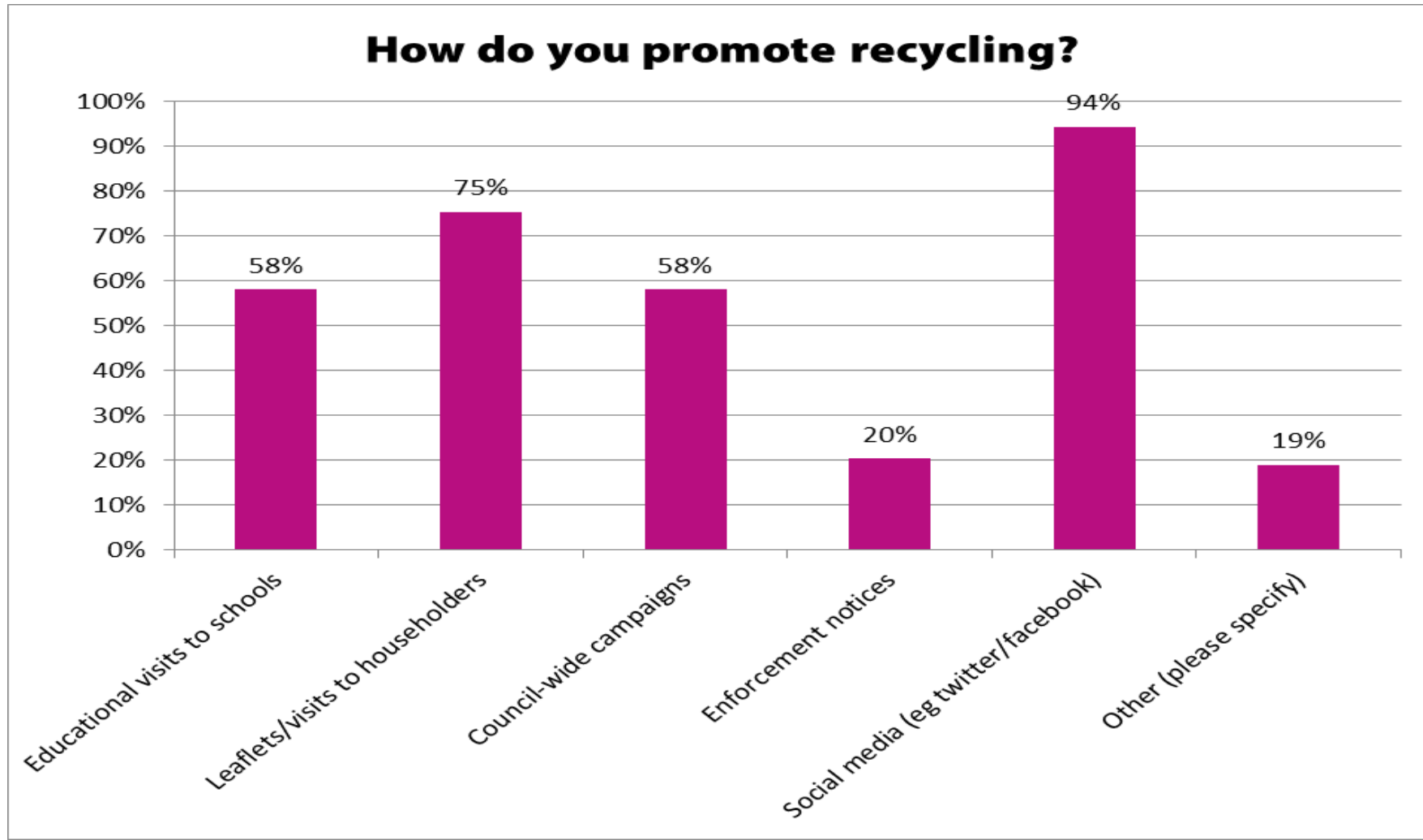
# Collection Methods

- 51% Operate 'task and finish'
- 12% use zonal working systems
- 42% use 5 day working week / 34% use a 4 day working week
- 63% have co-mingled collection system (70% in 2021)
- 16% operate source segregated collections
- 27% have a mixture of separate material collections and co-mingling.

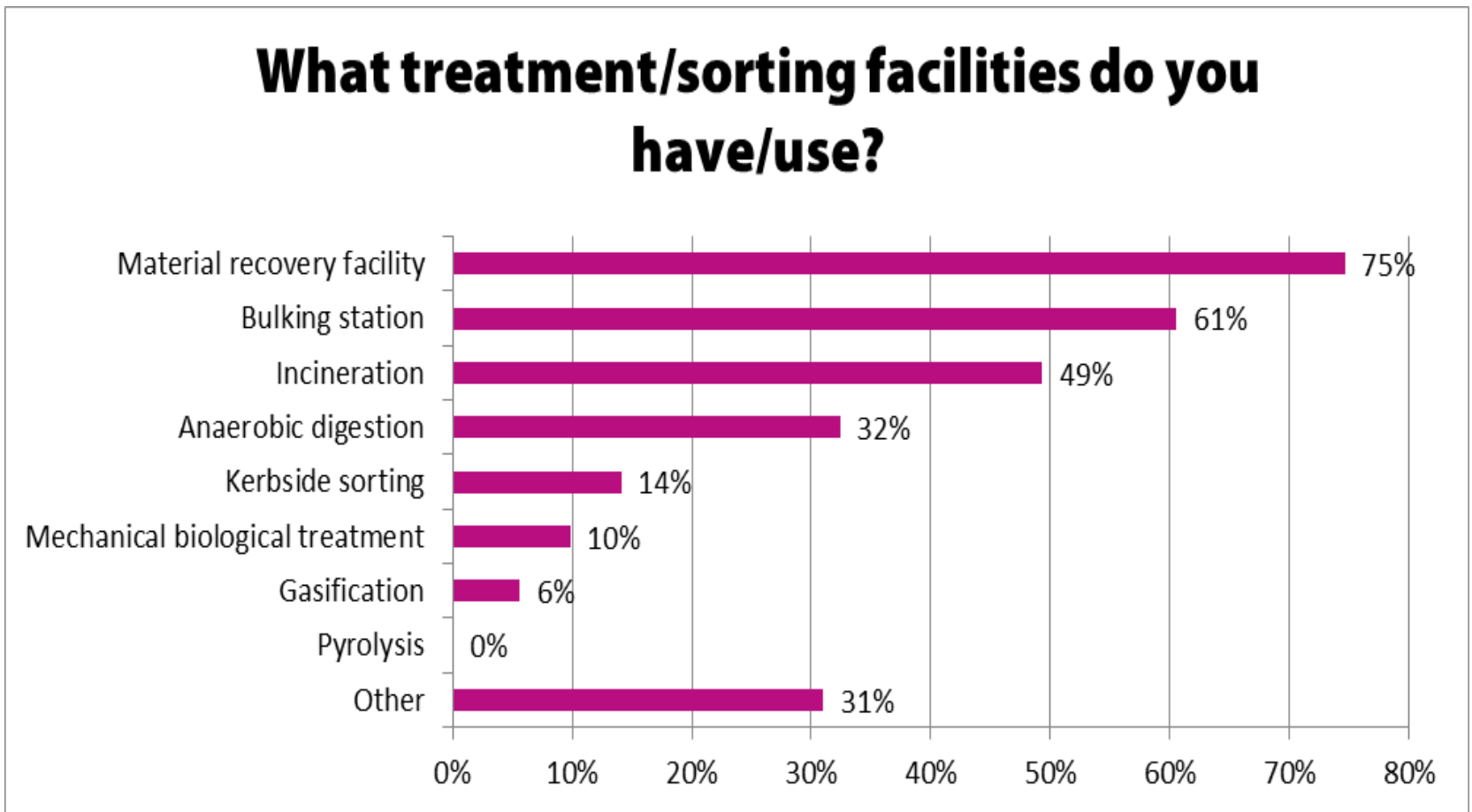




# Promoting recycling

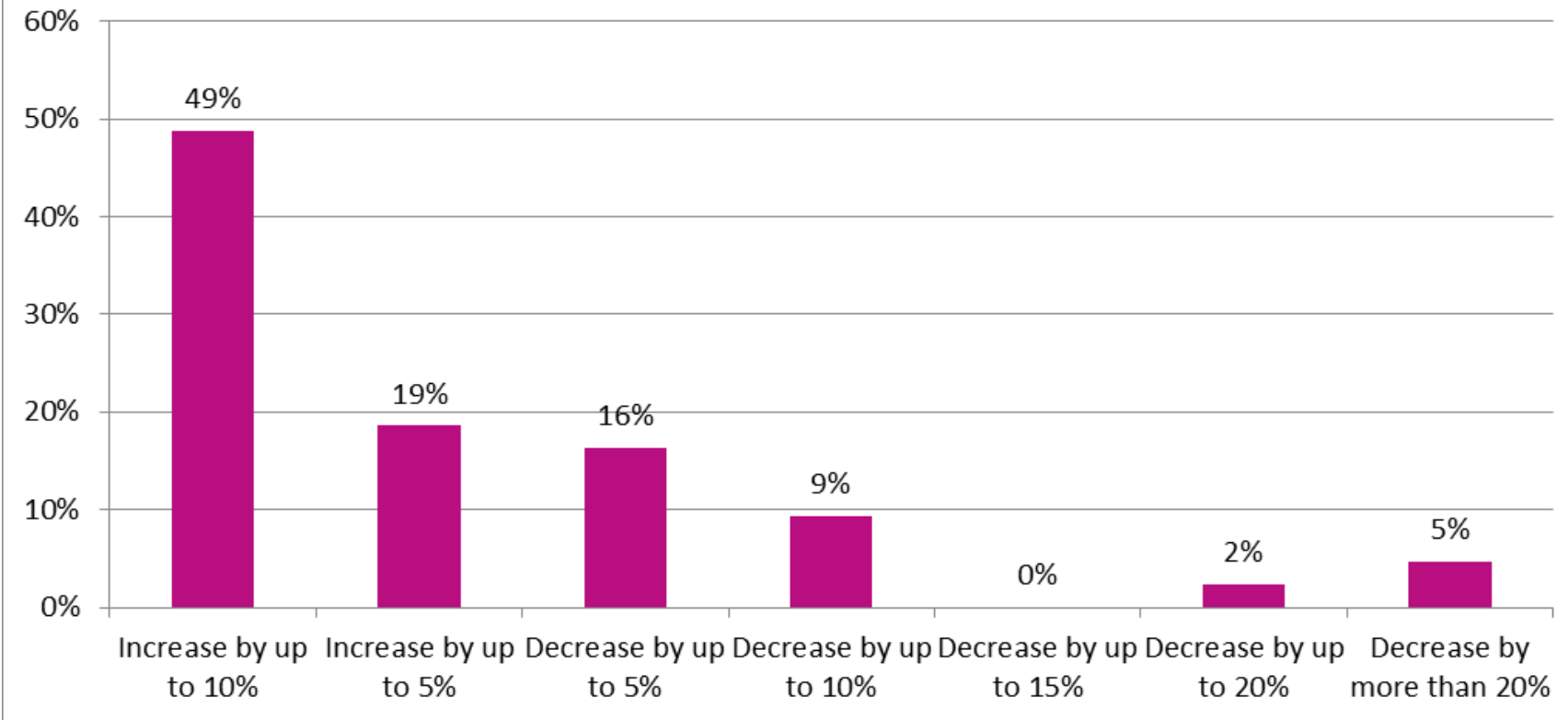


# Waste Treatment Facilities



# Budget Changes

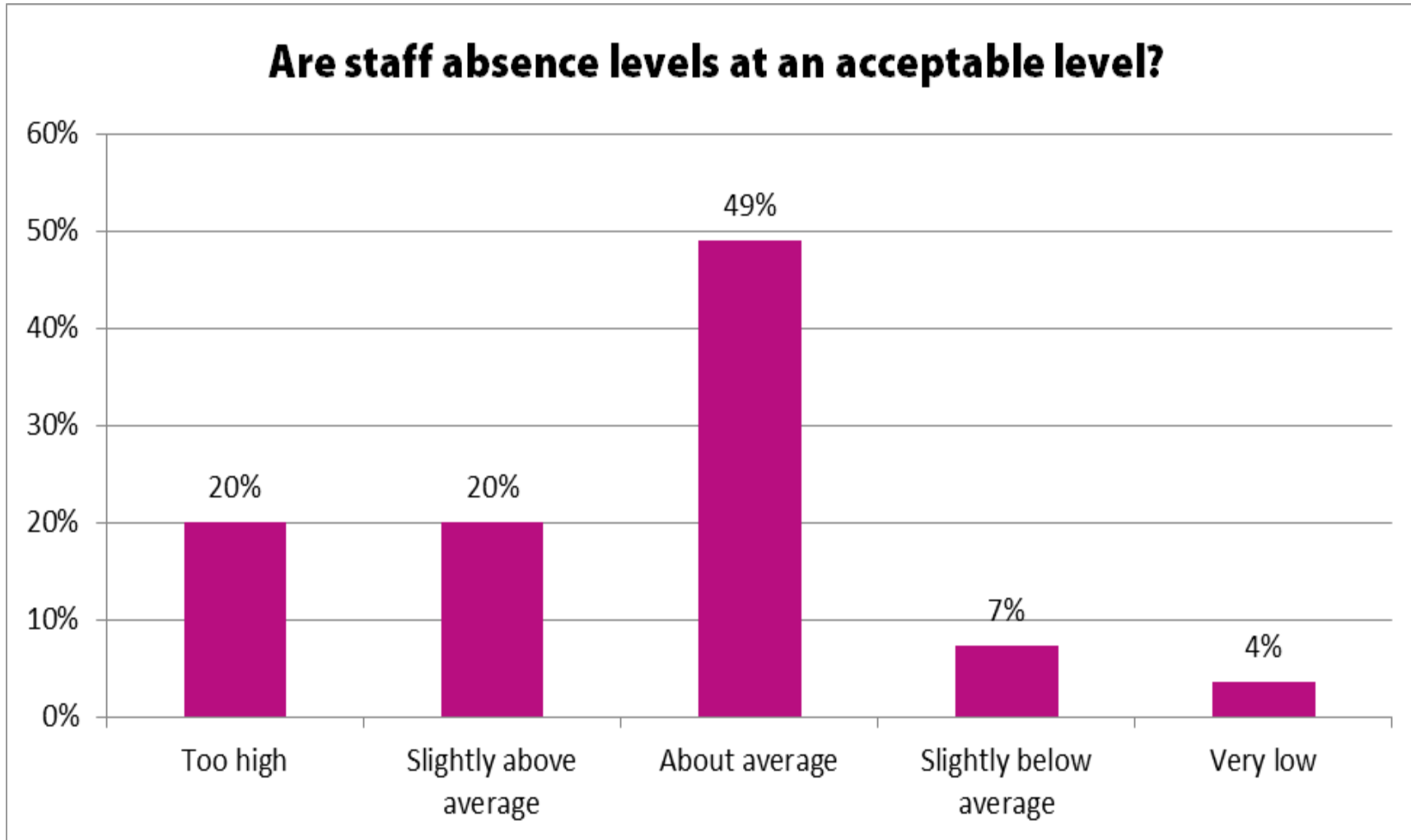
What is your expectation of the level of funding in your service budget in the coming five years?



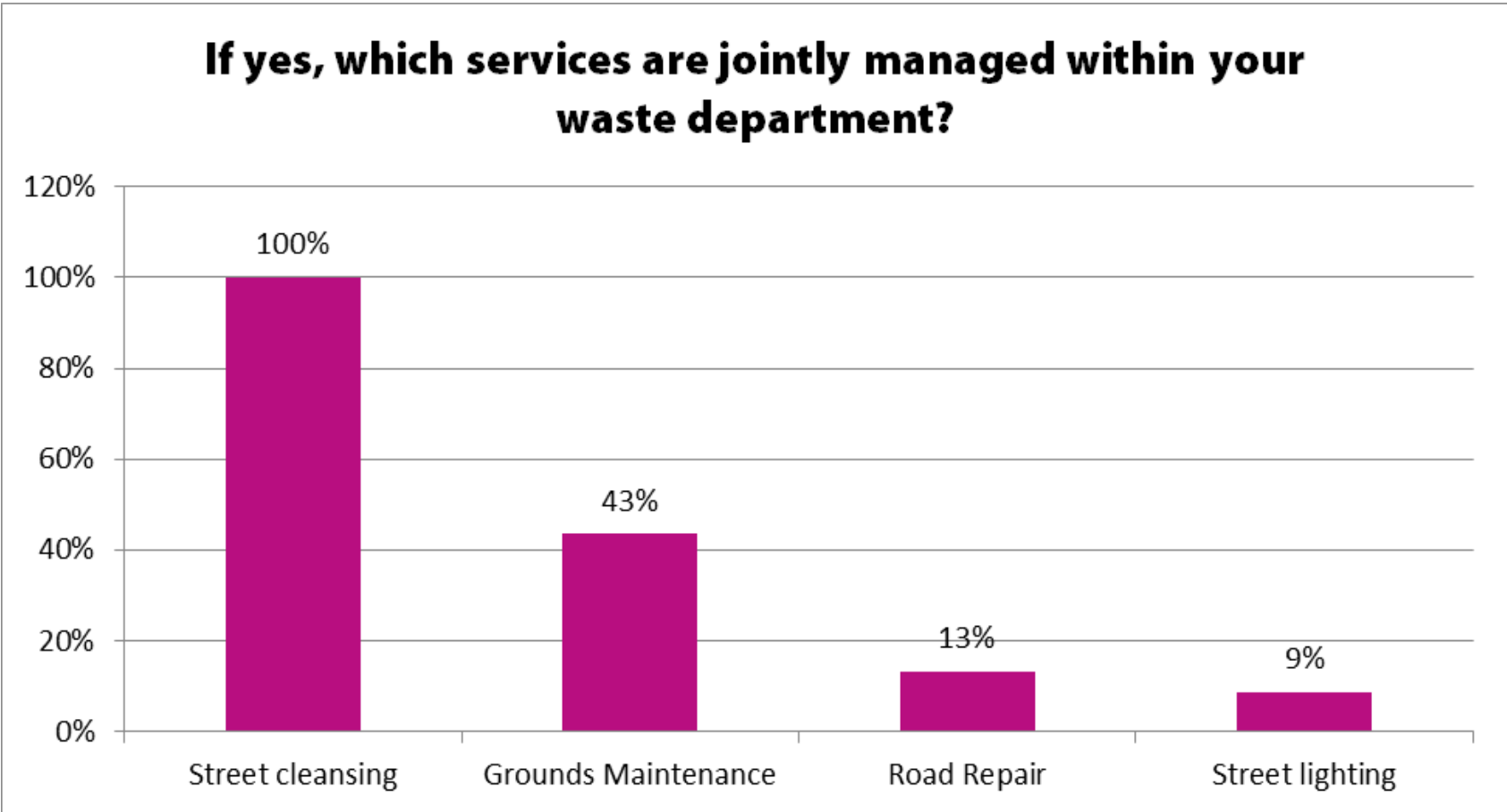
# Staffing Levels – next 12 months

Answer Options	Results from 2022	Results from 2021	Results from 2020
Natural wastage	9.4%	10.2%	17.2%
Recruitment freeze	15.1%	10.2%	12.1%
Voluntary redundancy	1.9%	6.1%	10.3%
Compulsory redundancy	0.0%	4.1%	1.7%
None of these	81.1%	81.6%	72.4%

# Staff Absence Levels



# Jointly managed services with waste



# In-House vs external provision

## SERVICE PROVISION

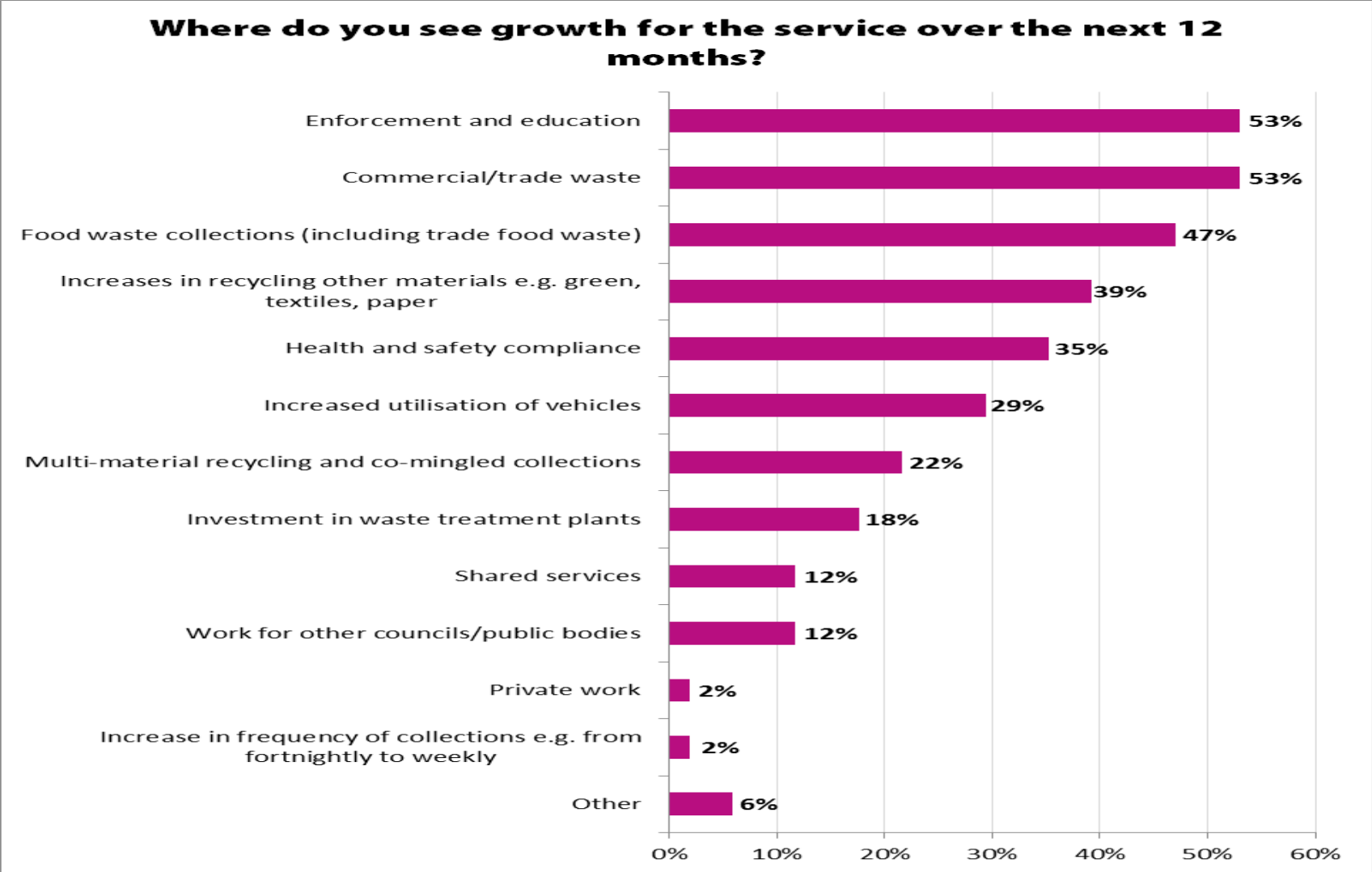
- 79% provide services in-house.
- 20% externally provided

## CONTRACT LENGTH (external)

- 10+ years = 13%
- 7-10 years = 60%
- 7 - 5 years = 13%
- Up to 5 years = 13%

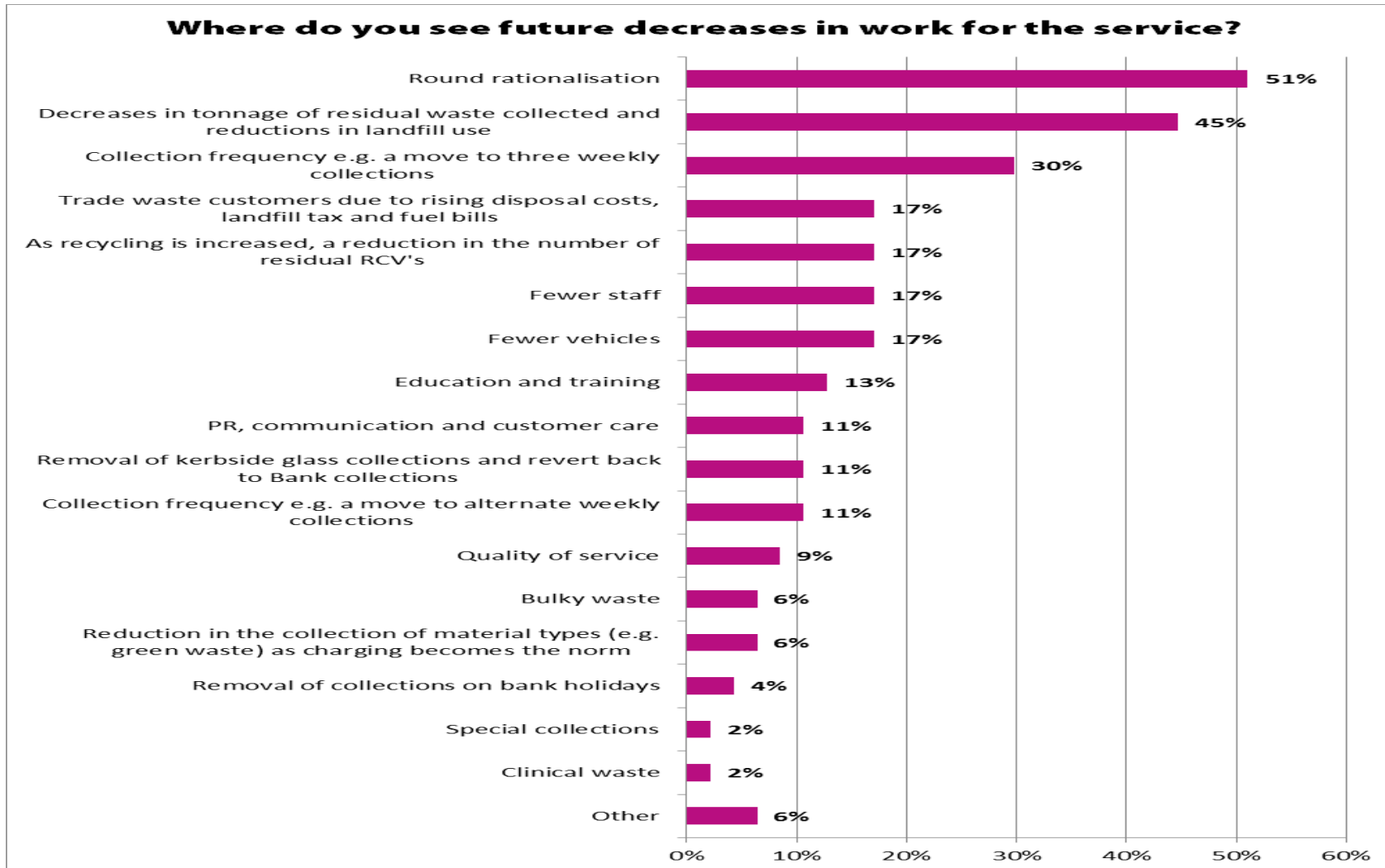


# Service growth next 12 months





# Service decreases next 12 months

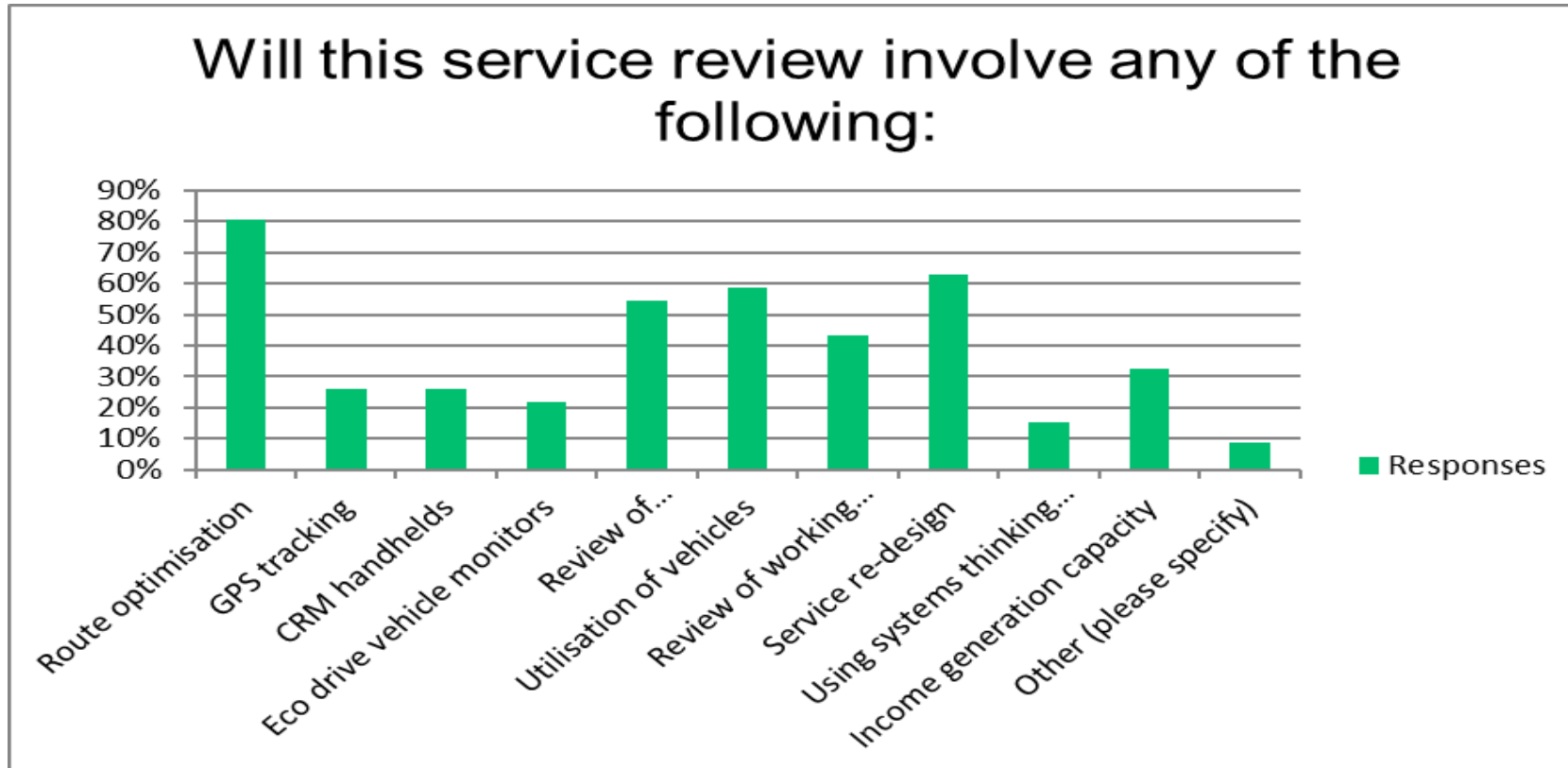


# Service Efficiencies

- 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
- **Underground bin systems/communal bin systems**

# Service Reviews – Current or Proposing

24% completed review  
41% review underway  
24% Planning a review



# **Trust and Confidence in Councils**

***What the public think***

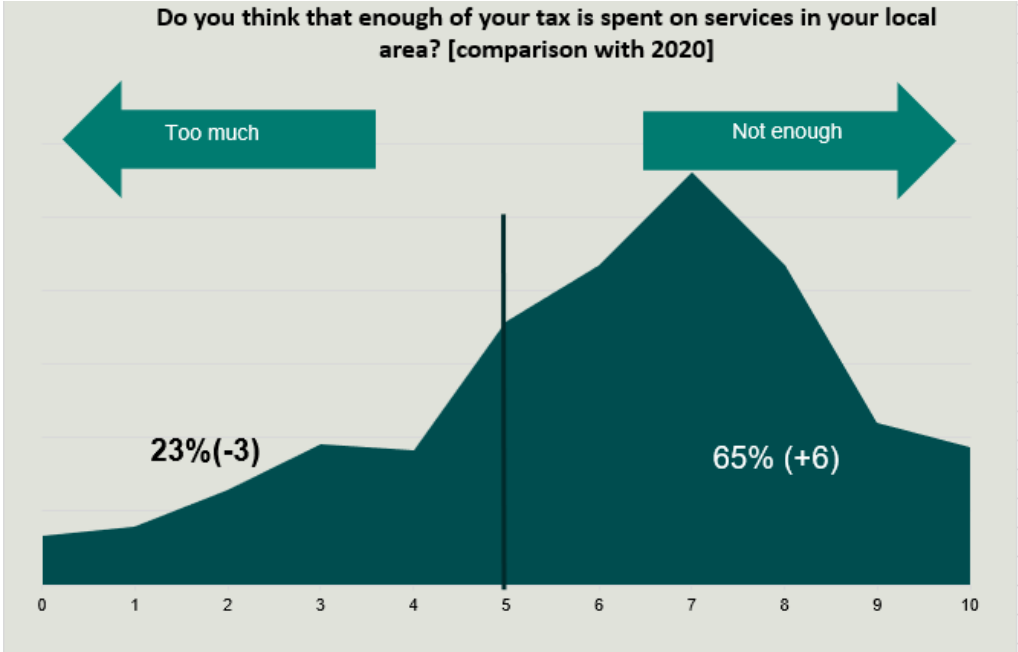
## Key Points: Trust and Satisfaction

1. Public trust marginally smaller than last year but remains high vs national government.
2. They trust you much more to spend their taxes than national government.
3. Satisfaction levels with many specific services remain high, despite this year's challenges

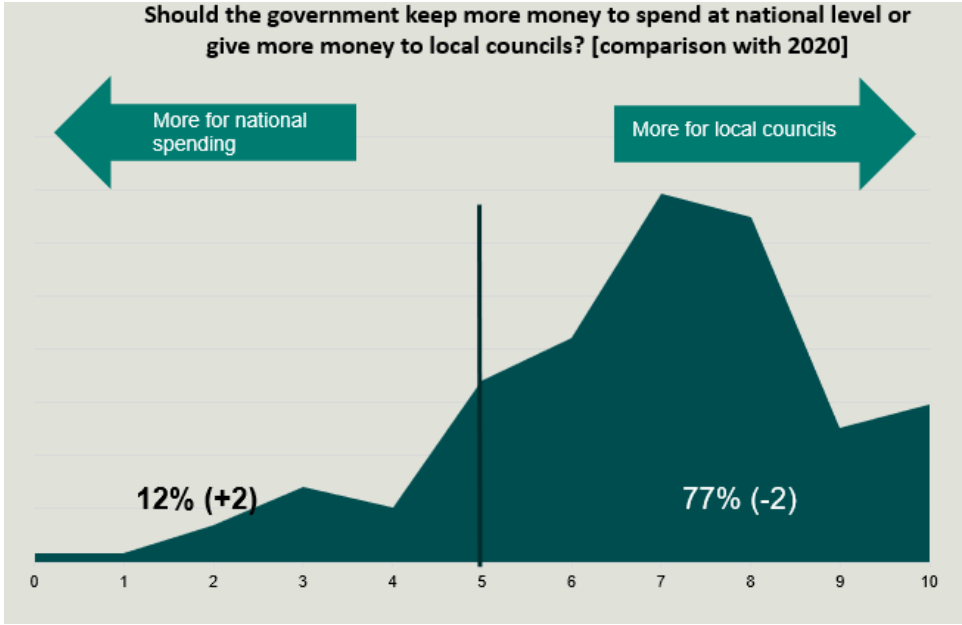
## **Key Points: Current and future challenges**

- 1. Councils are the most trusted to provide and deliver services in people's local area.**
- 2. Councils also the most trusted to make decisions regarding local planning.**
- 3. Climate change still a high priority, closely following affordable housing, social care, and road maintenance.**

# Enough of your taxes spent in your area?

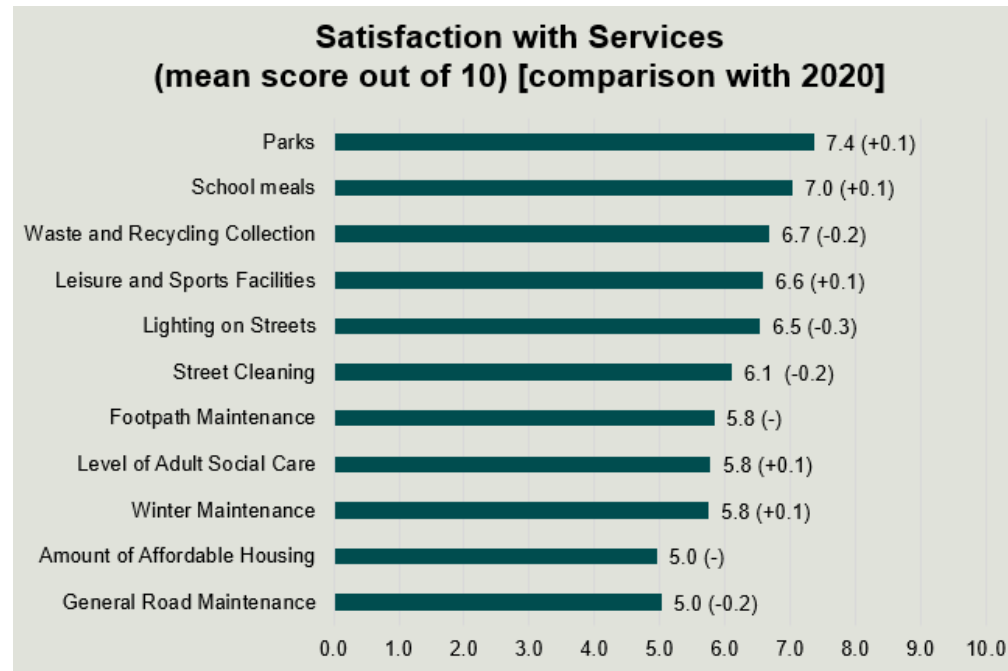


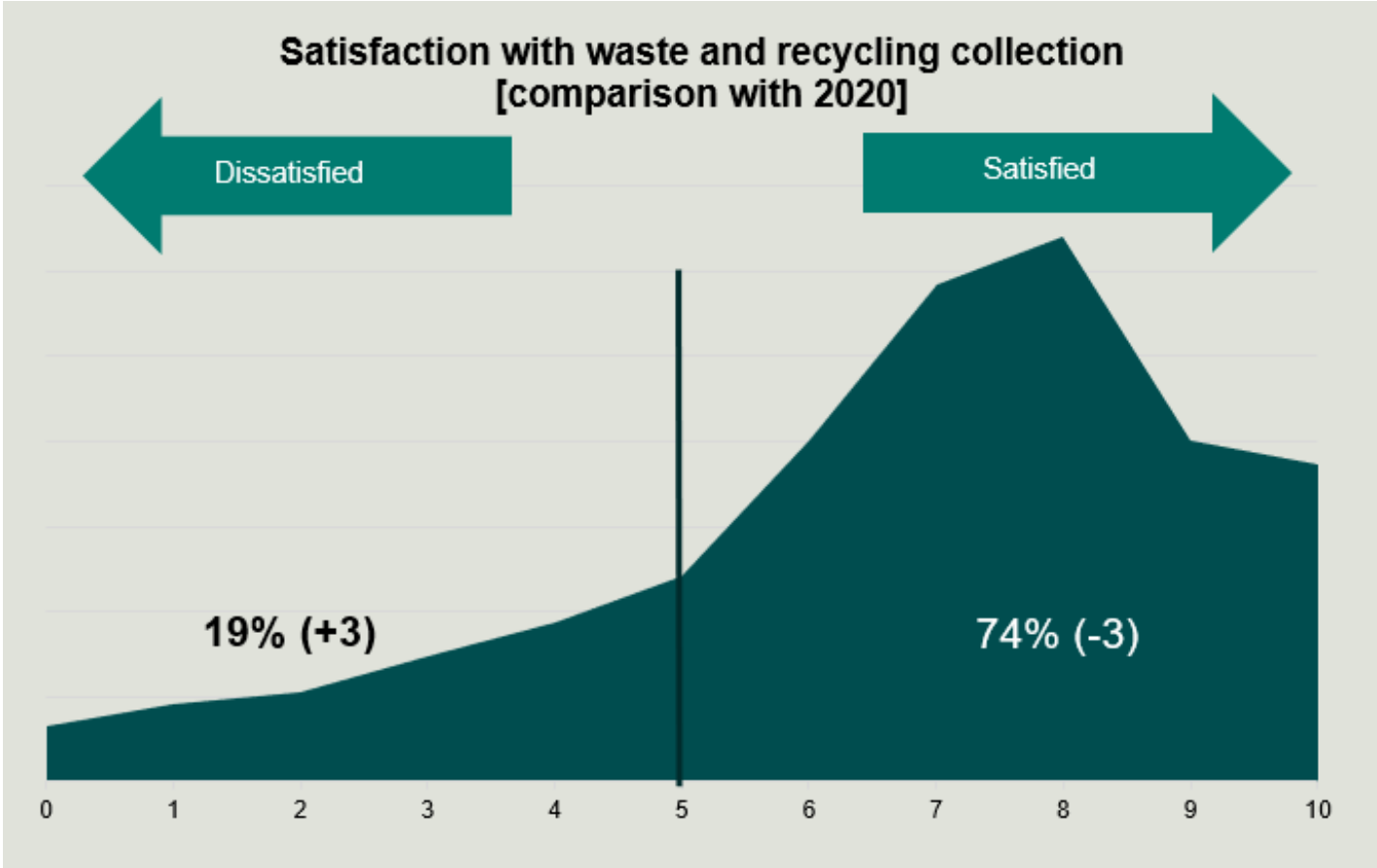
## Key fact 2 : People trust Councils with their tax

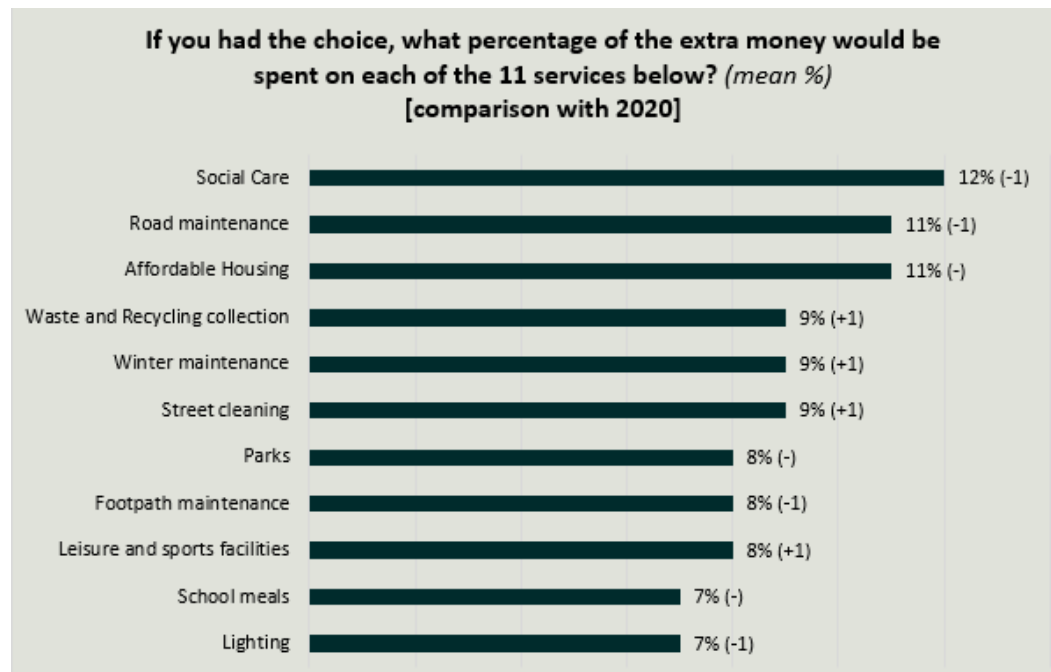




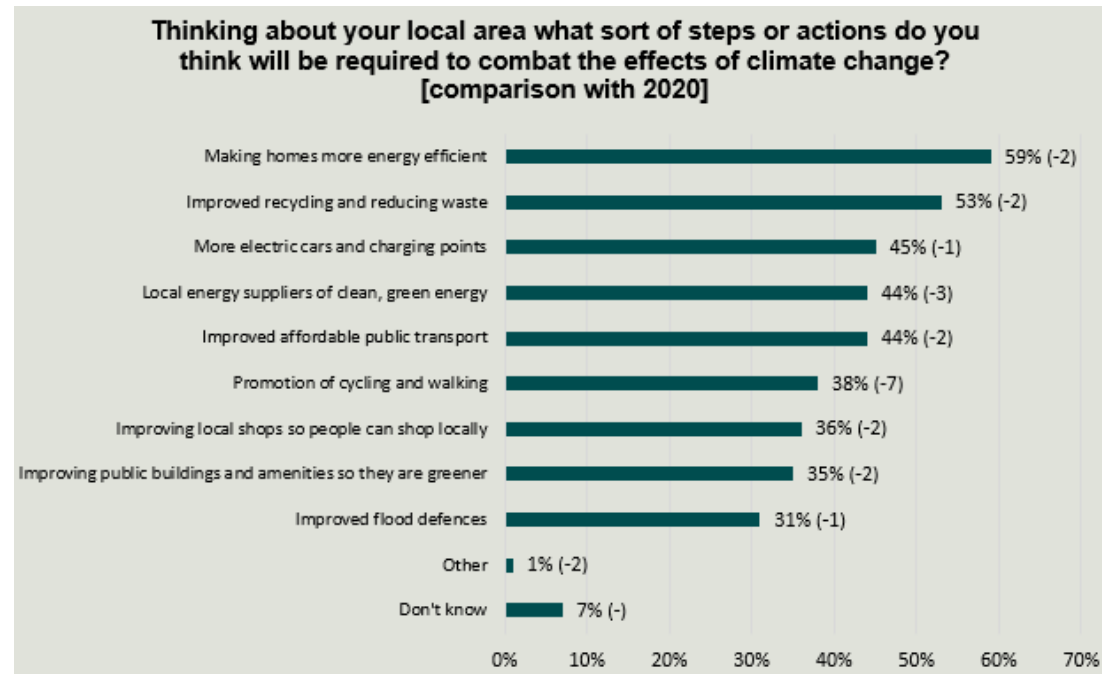
## Satisfaction levels vary between services







## Top priorities for local climate change action



# Conclusions

- Resource and Waste Strategy implications need clarity and funding
- On-going 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
- Still only 52% collecting food waste.
- Budgets appear more stable – at present
- Staffing appears more stable
- Behavioural change seen as critical to increase recycling rates
- New challenges Climate emergency declarations, resource and waste bill, new technologies considerations now impacting
- The public see your services as important and remain supportive