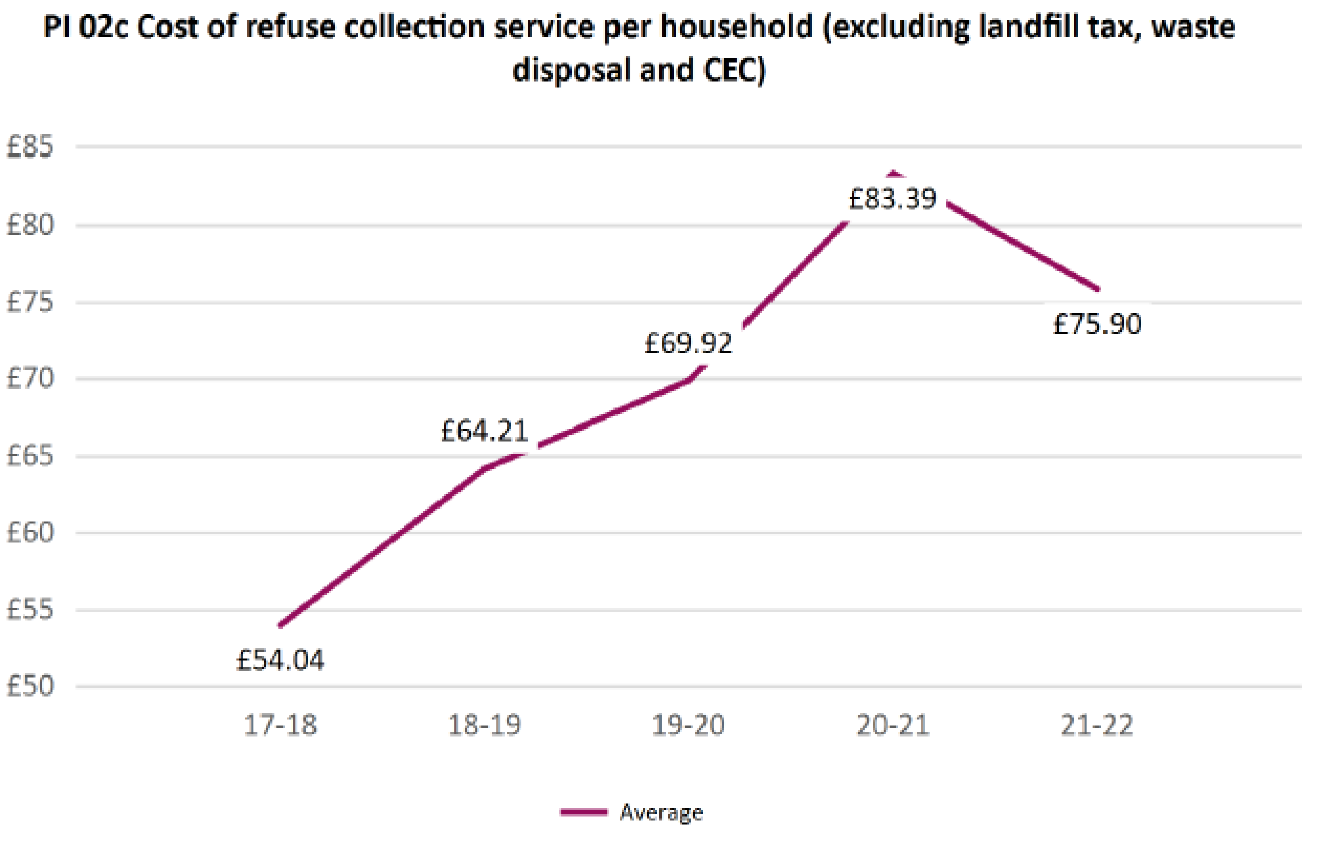
APSE State of the Market Report 2023
Refuse Collection and Recycling

State of the Market Surveys

- State of the Market Survey 2023
- 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
- Useful for benchmarking and performance management
- Used by National Government and in APSE research documents

Cost of Refuse Collection Services



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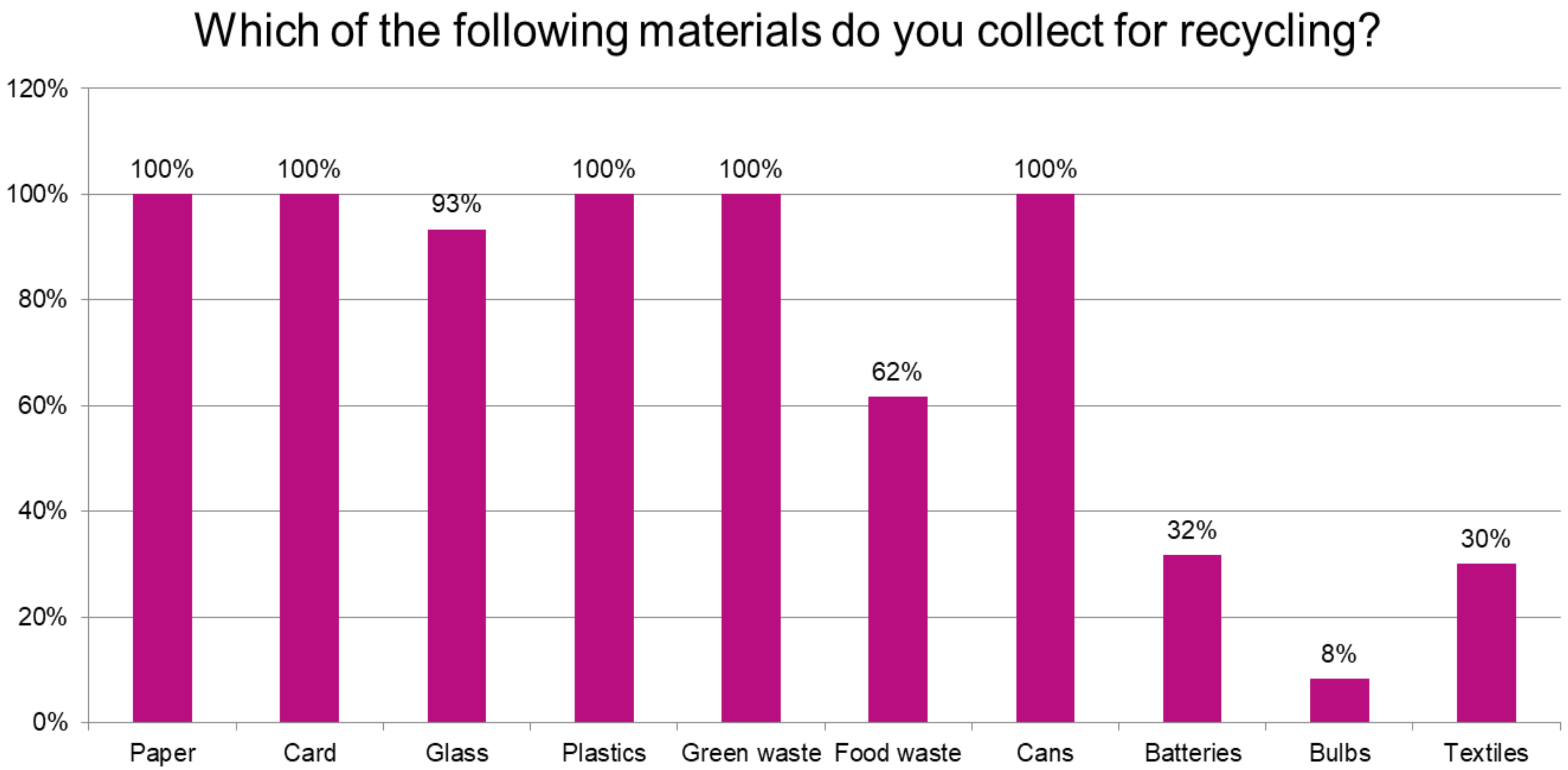
Materials Recycled



Collection Frequencies

Current state of play

Residual collections

- 7% weekly,
- 84% fortnightly
- 6% three weekly,
- 3% four weekly.

Next 2 years

- alternative weekly residual collections now the norm
- growing numbers introducing three weekly residual collections.
- 11% local authorities were looking at introducing four weekly residual collections.

Collection Methods

- 43% Operate ‘task and finish’
- 12% use zonal working systems
- 52% use 5 day working week
- 18% use a 4 day working week
- 70% have co-mingled collection system (64% in 2020)
- 17% operate source segregated collections
- 24% have a mixture of separate material collections and co-mingling.

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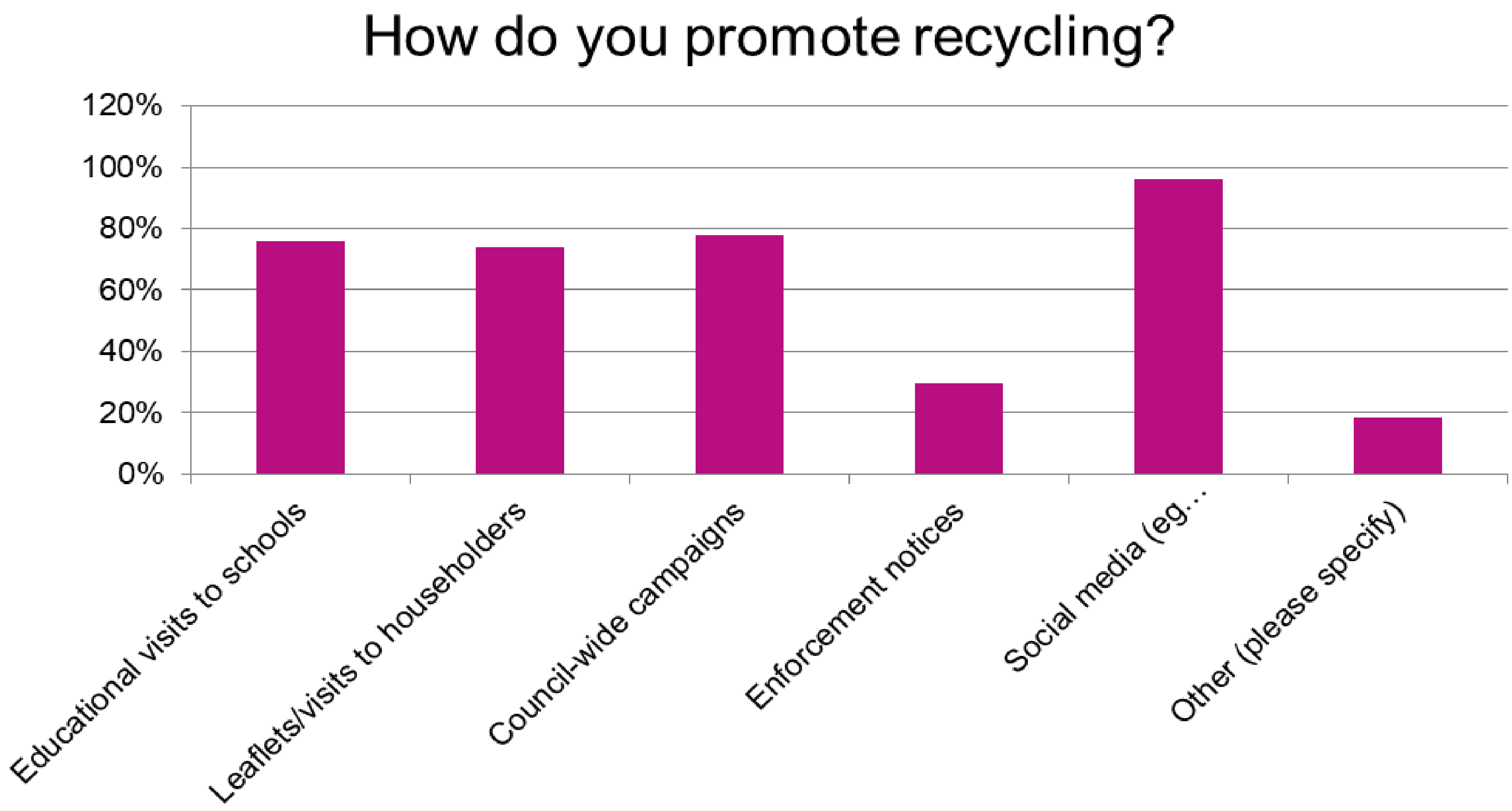
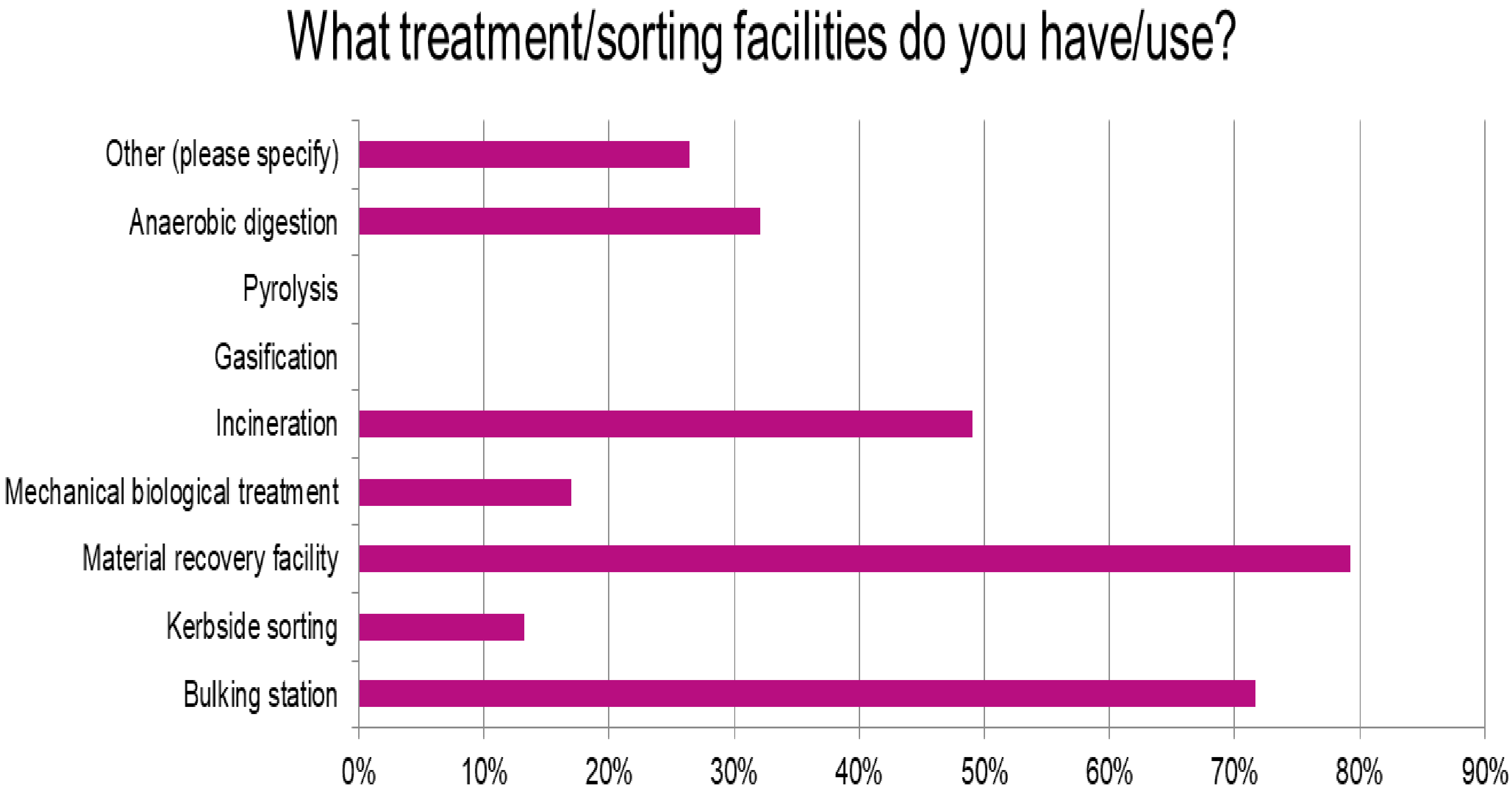
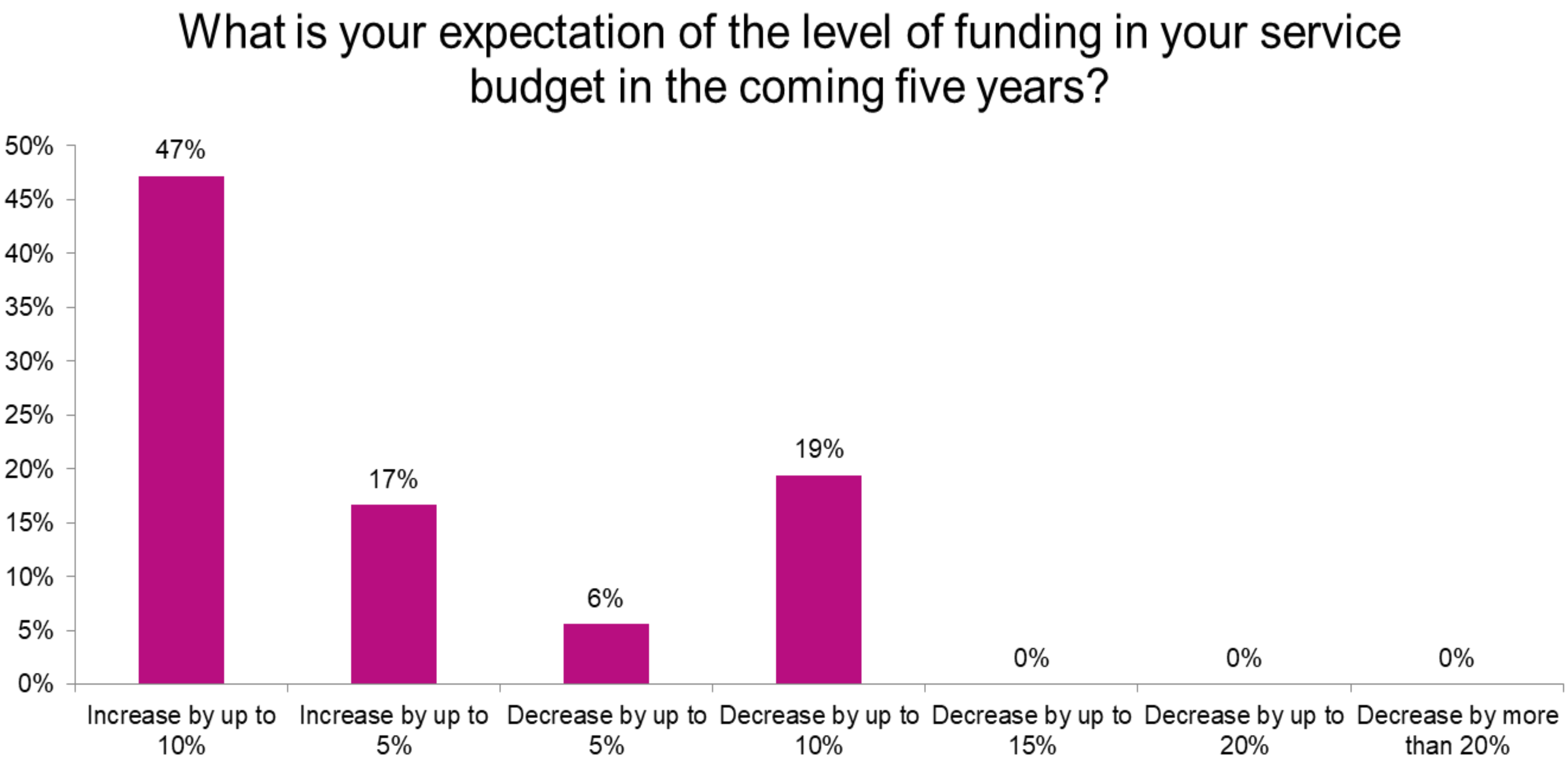
Promoting recycling



Waste Treatment Facilities



Budget Changes



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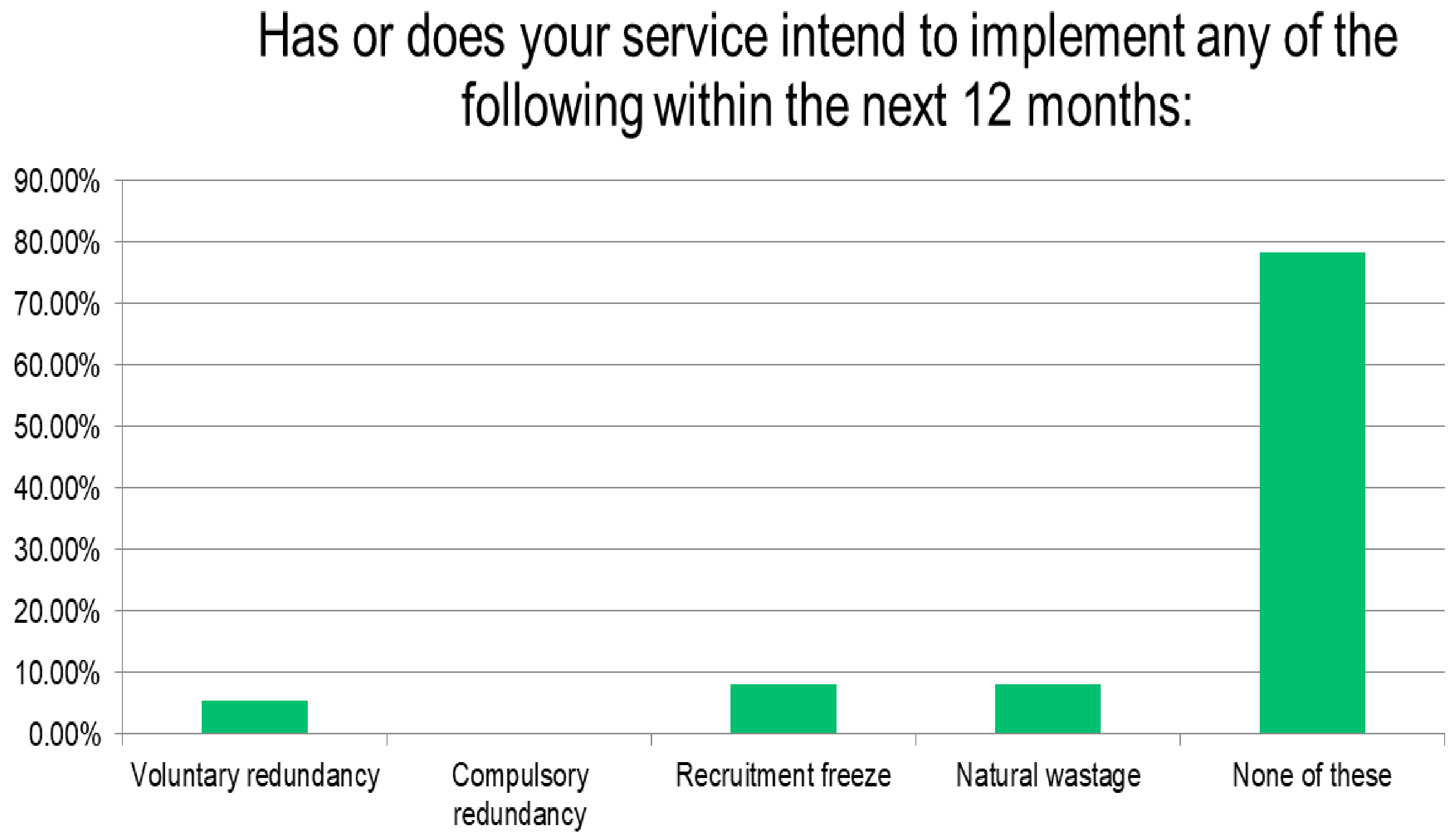
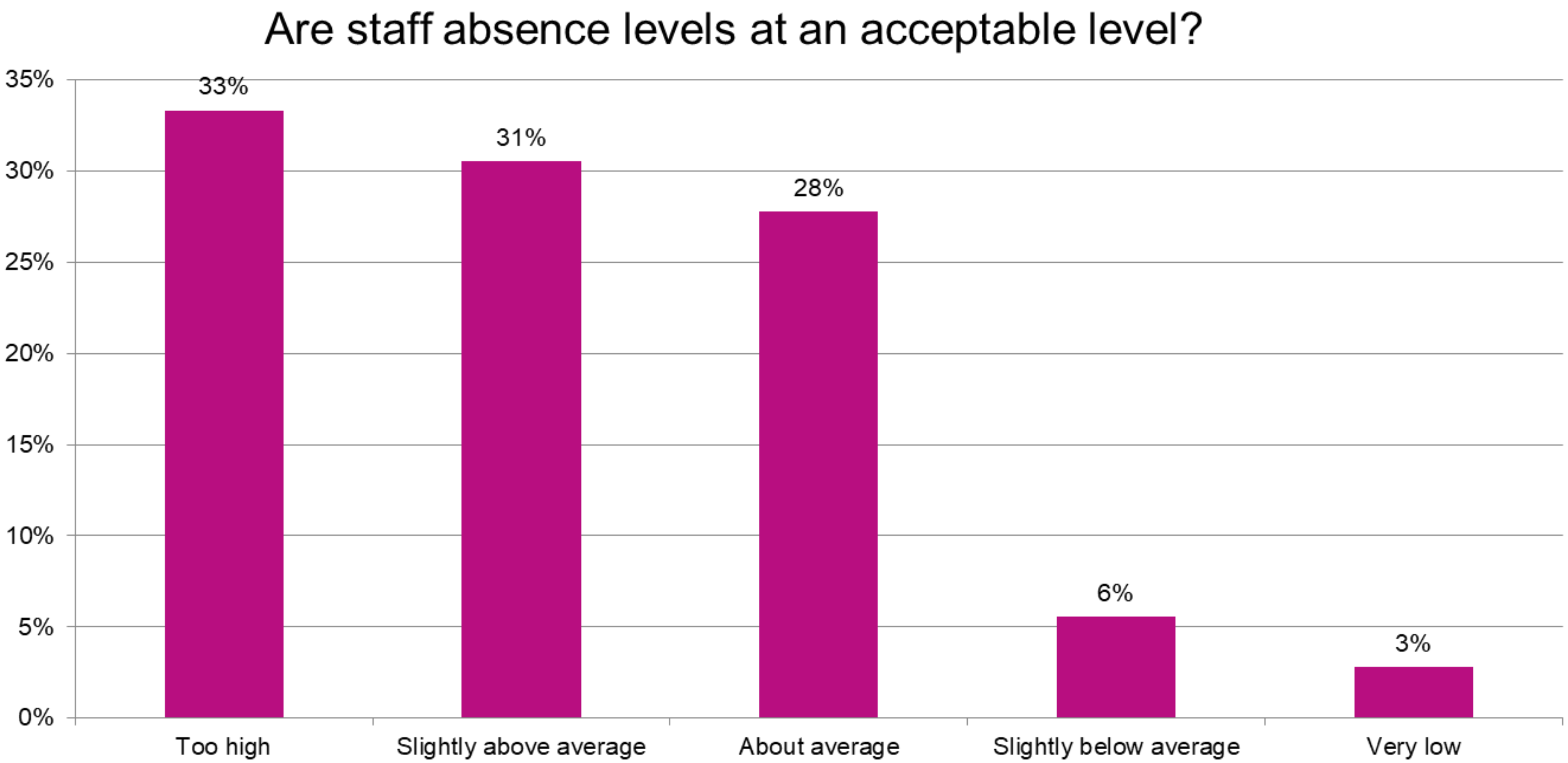
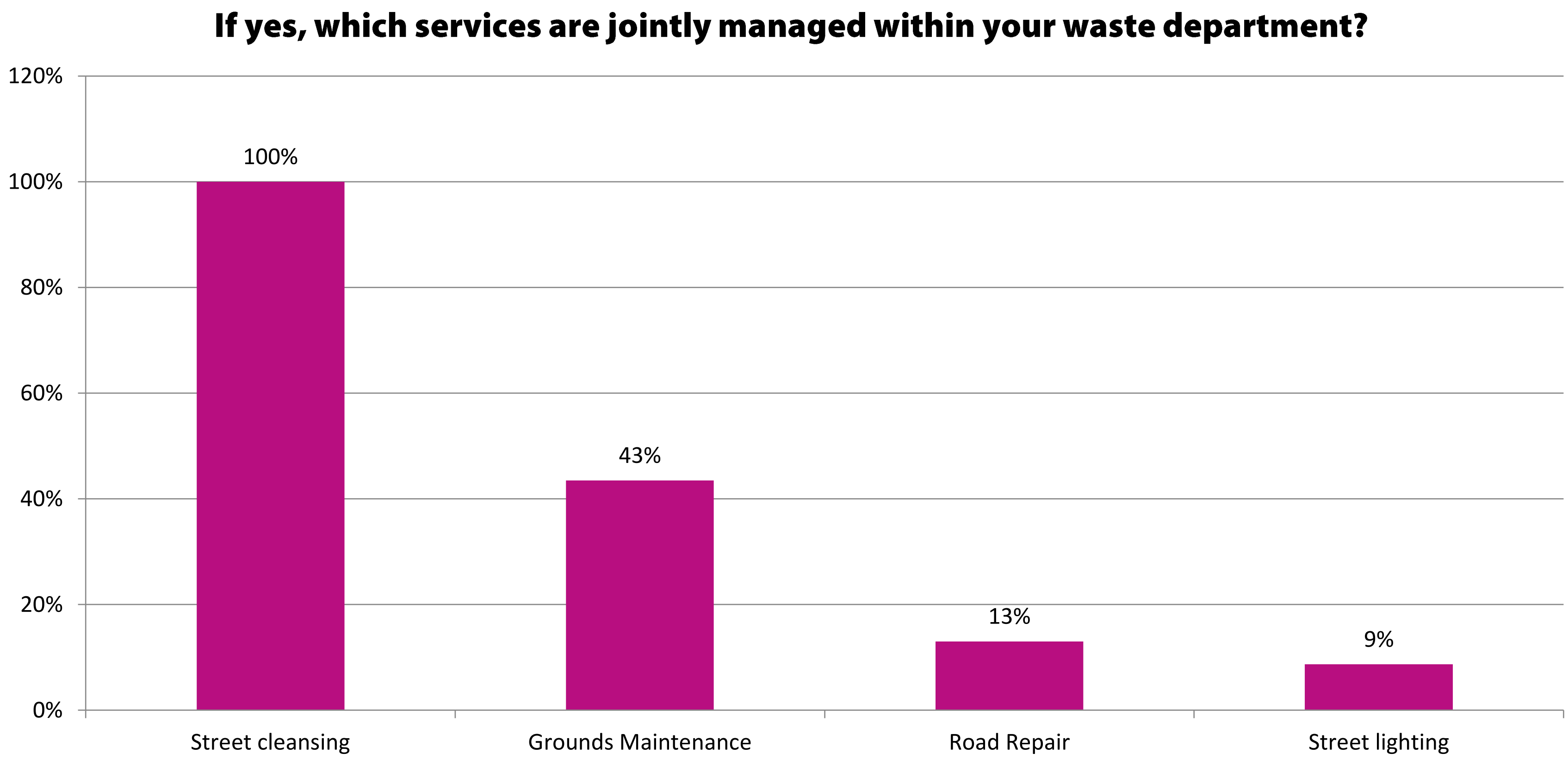
Staffing Levels – next 12 months



Staff Absence Levels



Jointly managed services with waste



In-House vs external provision

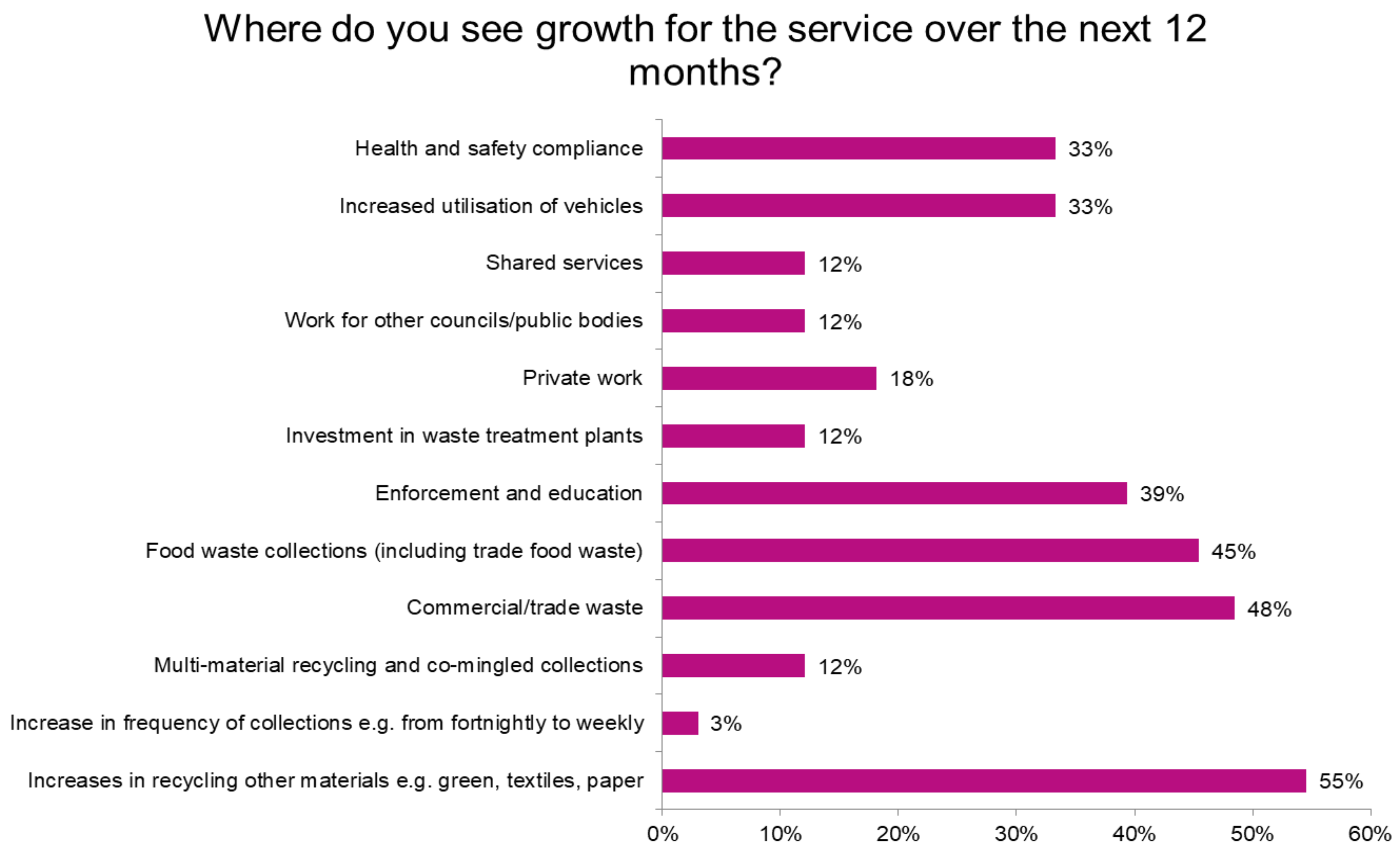
Service provision

- 54% provide services in-house.
- 29% externally provided

Contract length

- 10+ years = 25%
- 7-10 years = 30%
- 7 - 5 years = 10%
- Up to 5 years = 15%

Service growth next 12 months



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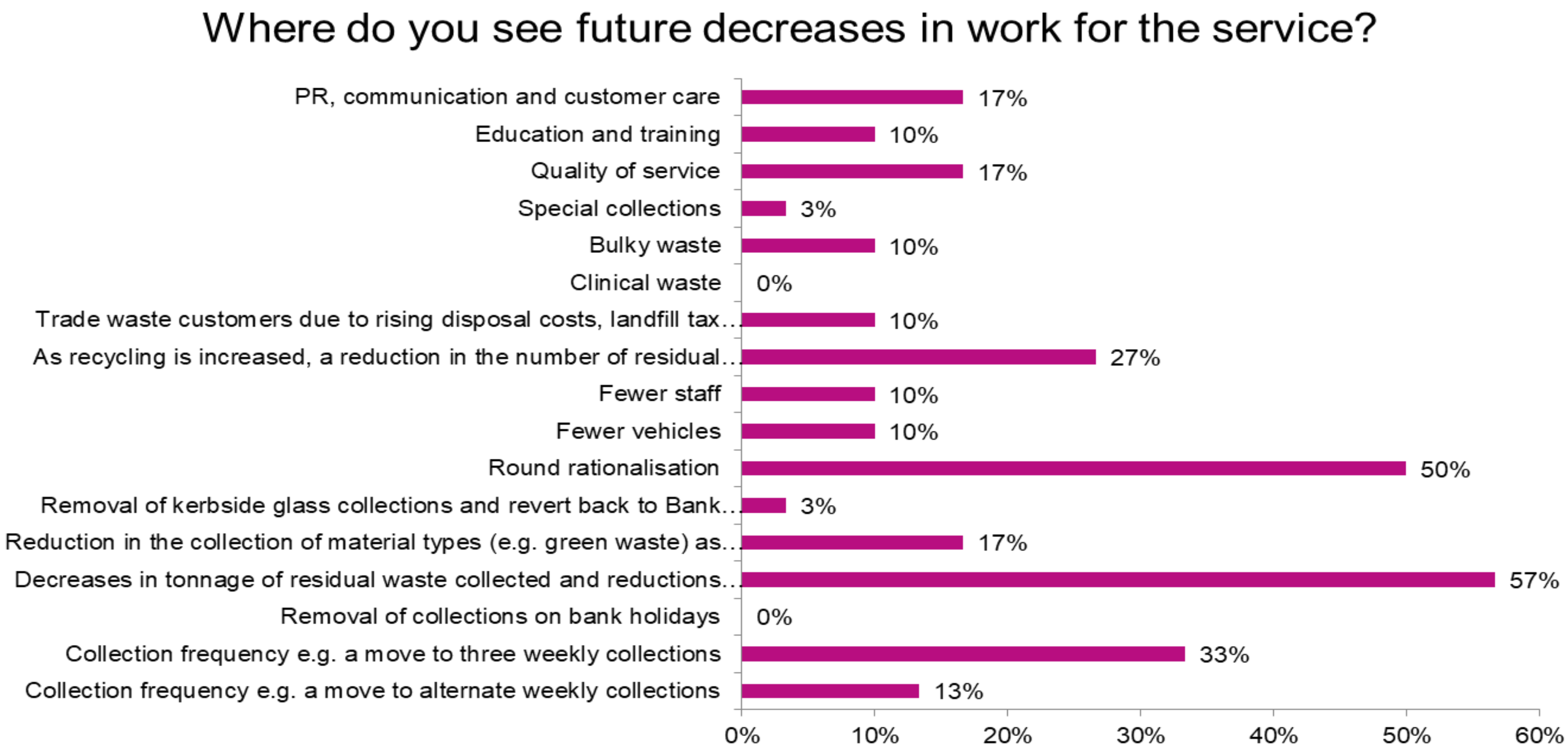
Service decreases next 12 months



Service Efficiencies

- Route optimisation/double shifting of vehicles/some new vehicles
- Review of local agreement to introduce collective task and finish (rather than general task & finish).
- 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.
- New technology – bin sensors, in-cab CCTV, hand helds.
- Reviewing the operation of the Household Waste Recycling Centres

Service Reviews
Current and Proposing

30% completed review
15% review underway
33% Planning a review

Route optimisation	66.67%
GPS tracking	20.83%
CRM handhelds	12.50%
Eco drive vehicle monitors	0.00%
Review of productivity/work study	33.33%
Utilisation of vehicles	62.50%
Review of working time/rota's	41.67%
Service re-design	75.00%
Using systems thinking techniques	8.33%
Income generation capacity	25.00%
Other (please specify)	20.83%

How have the delays in bringing in the new requirements of the Resources and Waste Strategy affected your service?

- *“Uncertainty in planning for future collection service”.*
- *“Uncertainty in forthcoming changes halting amendments to the service and giving uncertainty to vehicle replacement programme”.*
- *“Negotiating an extension to the existing contract but the recent further delays have impacted this and the extension will now not cover the timeframes now in place”.*
- *“No certainty in the policy landscape means delayed investment by private sector and knock-on delays to introduce new collections schemes to drive up recycling and reduce carbon impact”.*
- *“They have prevented us from trying to change the collection service, delayed investment in vehicles and delayed implementation of a food waste collection service”.*

Conclusions

- Resource and Waste Strategy implications new focus of work
- Promise of additional funding in order to meet strategy requirements
- 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 62% collecting food waste.
- In-House provision has fallen for some reason
- 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

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