



membership resources

# State of the Market Survey 2013

## Local Authority Refuse Services



**Briefing 14/02**

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# Local Authority Refuse Services

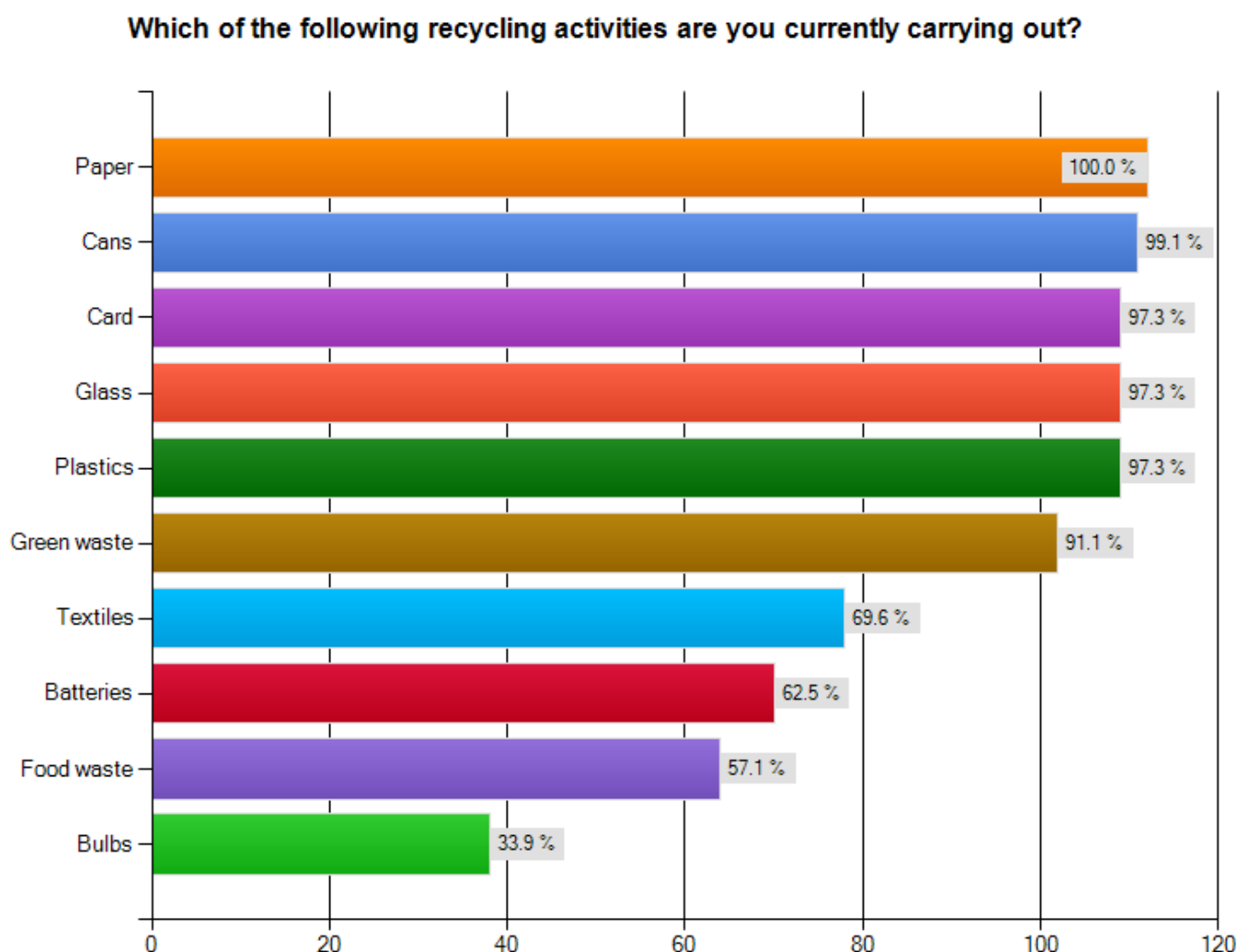
## State of the Market 2013

APSE conducted an on-line survey during August 2013. This follows on from the 2012, 2011 and 2008 Refuse Collection State of the Market surveys where similar questions were asked to allow for trend comparisons. 113 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

### Results from the survey

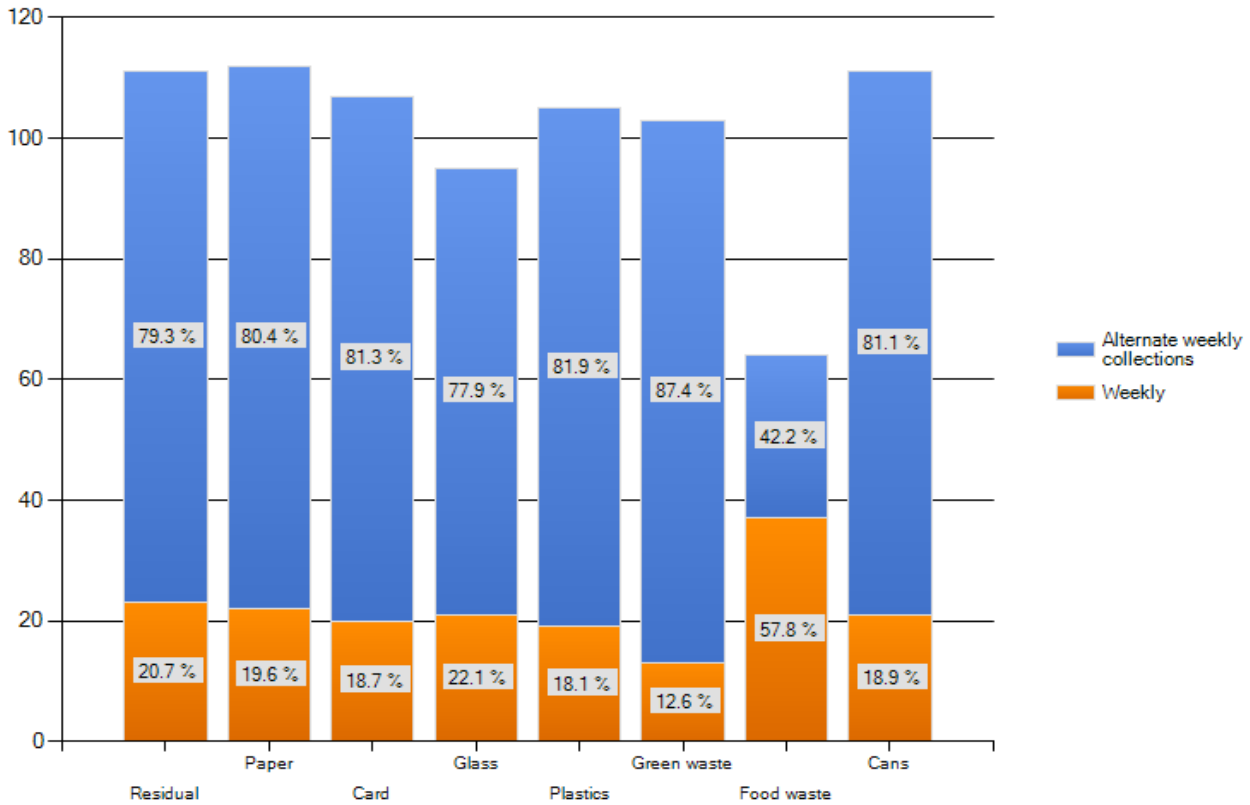
#### a) Recycling activities

In terms of what recycling activities are currently carried out, the results were as follows:



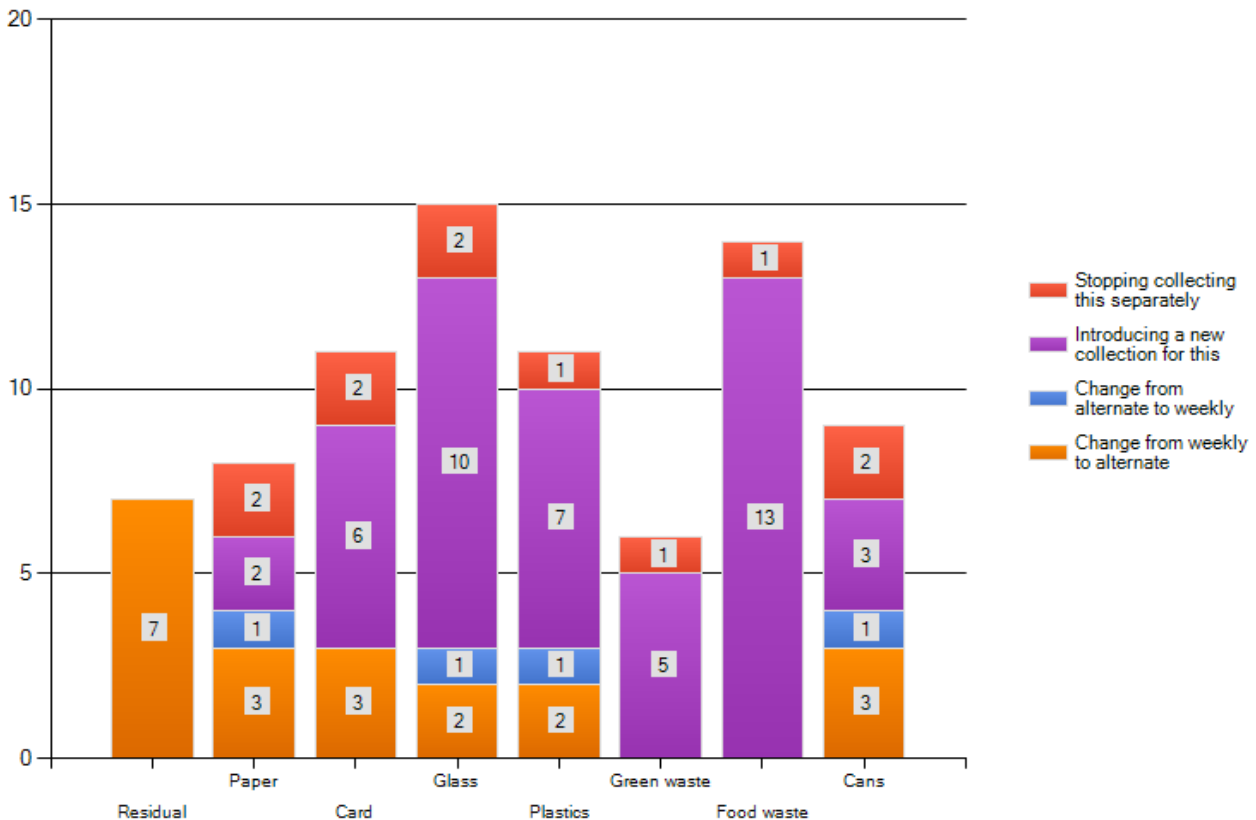
In relation to the frequency of collections (weekly or alternate collections), the number of responses for each of the different types of collections (and the percentage breakdown between weekly and alternate collections) were as follows:

**Which of the following activities are you currently carrying out and do you operate weekly or alternate weekly collections?**



Members were asked whether there were going to be any changes to their residual and recycling collections in the next 2 years. The number of respondents who indicated that there is going to be changes are displayed below:

**Are there going to be changes to your residual and recycling collections in the next 2 years?**



As can be seen above, the main changes are 7 respondents indicated that they are going to change from weekly to alternate collections for residual , 10 respondents are introducing new collections for glass and 13 respondents are introducing a new food waste collection service.

Respondents were asked if they had made a bid for the Weekly Collections Support Scheme (funding made available by Communities and Local Government designed to support local authorities to introduce, retain or reinstate a weekly collection of residual waste and/or recycling (for example food waste)). 27% of eligible councils answered 'yes' to this question and the main intentions for the use of this money included food waste schemes and the retention of weekly collections.

### b) Collections and disposal methods

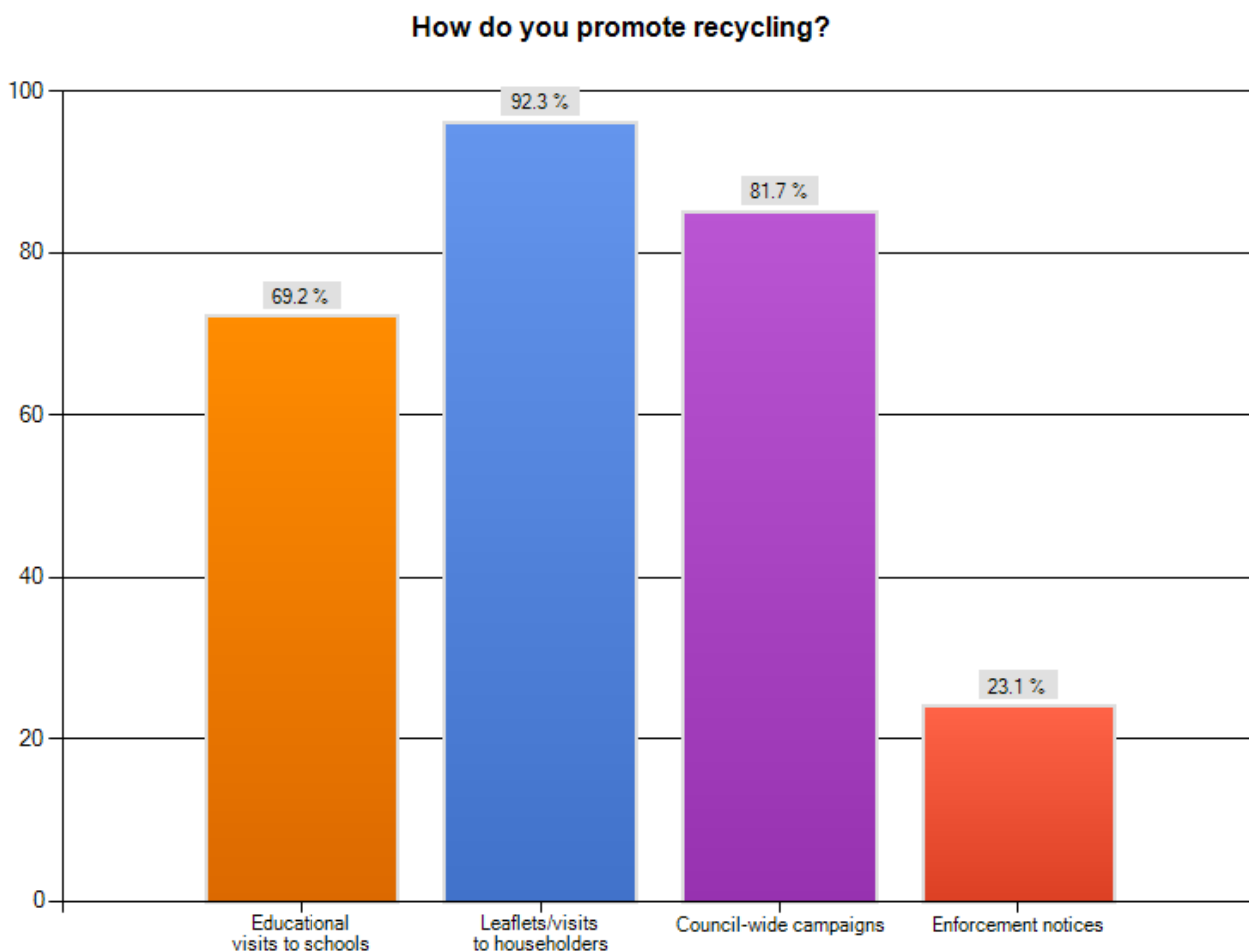
46% of respondents indicated that they operate a task and finish system for refuse collection (a reduction from 52% in 2012 and 60% in 2011) and 36% have zonal working (collecting all waste from one zone on the same day).

47% operate a 5-day week (which is a slight reduction from 51% in 2012), whereas 22% operate a 4-day week (compared to 18% in 2012). Only 1% of respondents have a double shifting system in place.

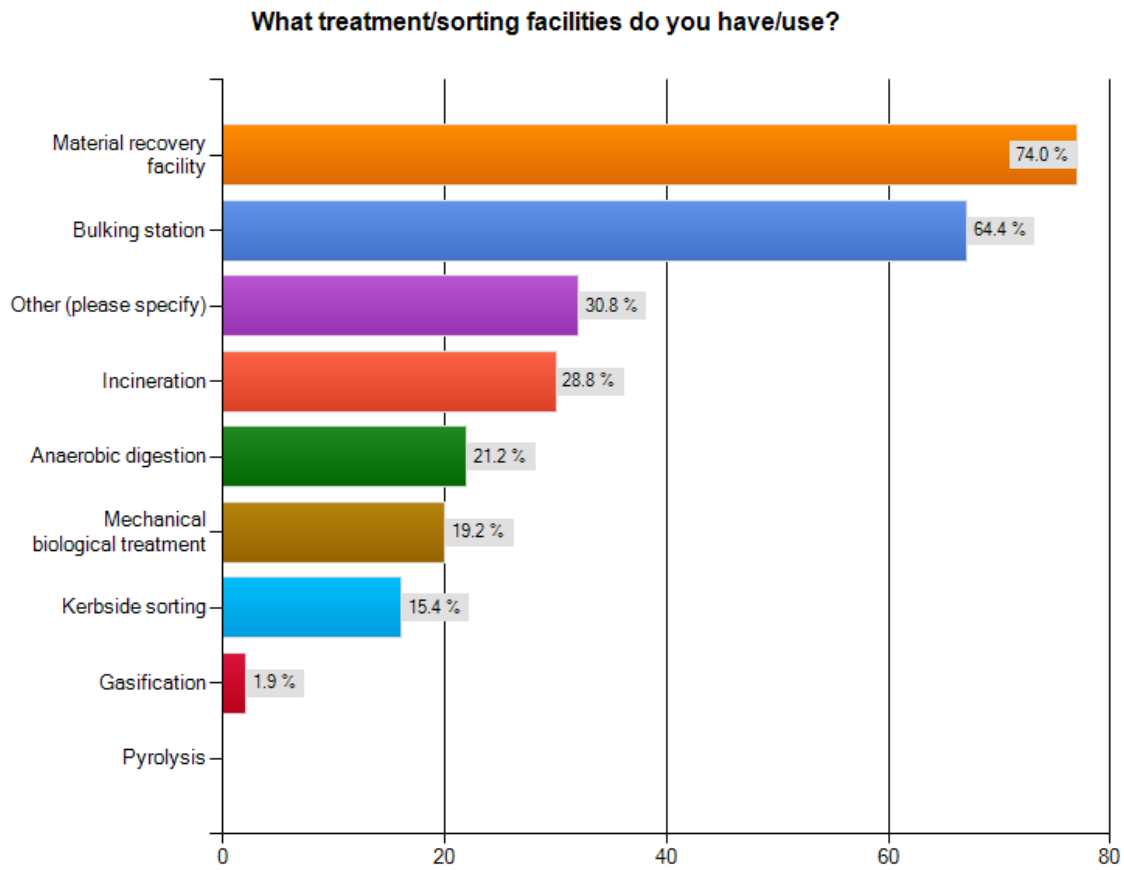
On average, 5% of containers are replaced every year (including residual, kerbside recycling, green and kitchen waste).

84% operate co-mingled collections, which is an increase from 72% in 2012.

The following chart shows a breakdown of methods used to promote recycling.



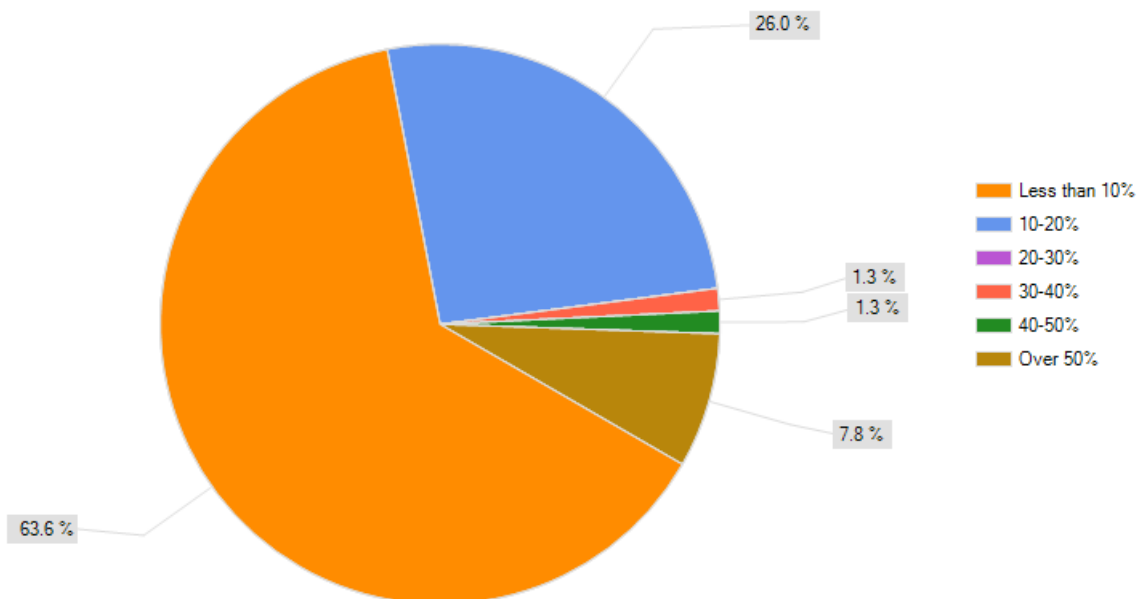
Treatment and sorting facilities include:



**c) Investment in and managing the service**

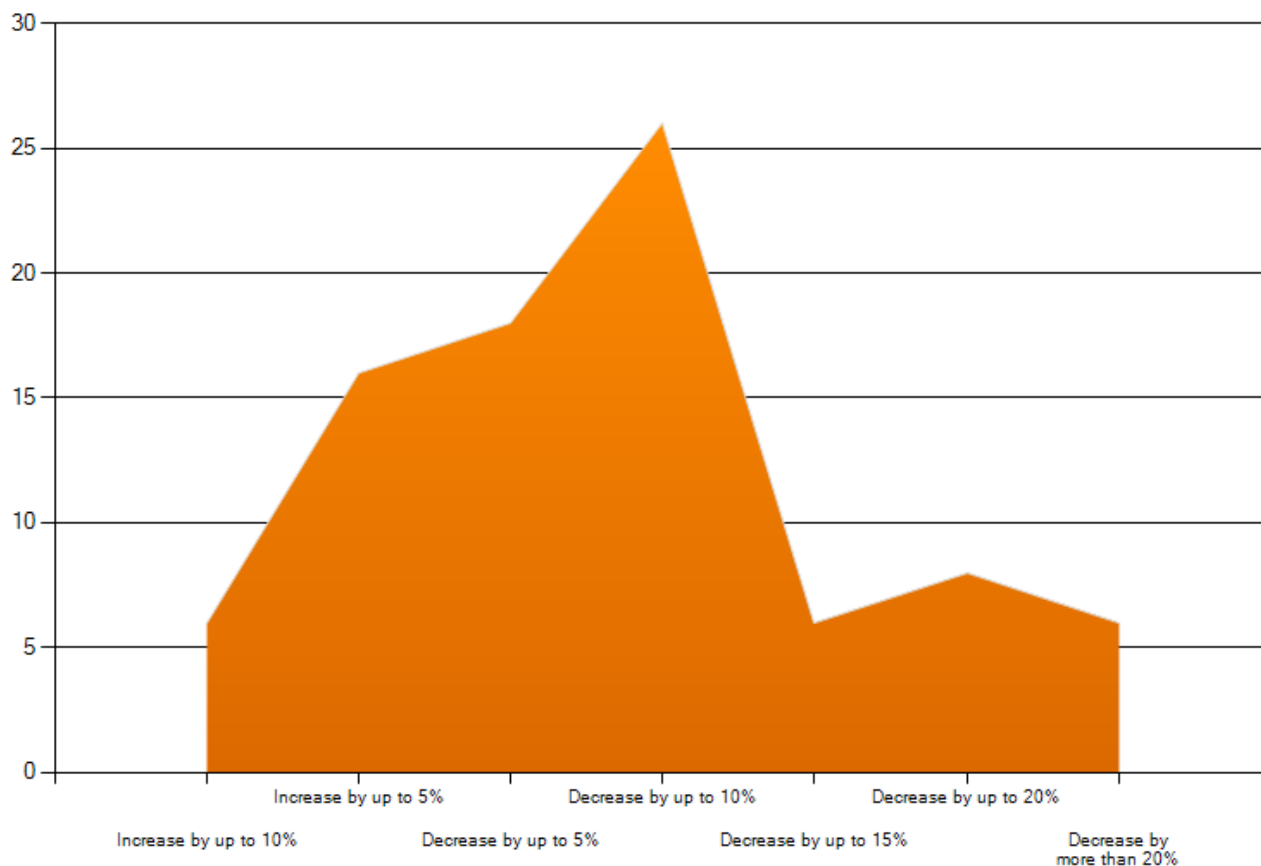
When asked what additional capital investment has been required in the past 2 years, the responses were as follows:

**What additional capital investment has been required in the past 2 years?**



79% expect the refuse budget to change next year, with the majority of these (66%) expecting a decrease in revenue and some (31%) expecting a decrease in capital. Over the next 5 years, the majority of respondents expect to see a reduction in their service budgets of up to 5% or 10%.

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



The survey asked 'What efficiencies are you currently working towards or proposing' and the main responses to this question are as follows:

- Changing working days (e.g. 4 day week), shift patterns and staff reductions
- Route optimisation/rationalisation
- Changes to collections (comingling, alternate weekly collections, type of containers, side waste policy and reduced frequency collections e.g. on green waste in the winter and paper collections)
- Review of transport, vehicle utilisation, extending the life of vehicles and in-cab technology
- Introduction of income streams (trade waste, green waste, replacement bins, developer contributions and maximising material re-sale)
- Review of bring banks and civic amenity sites
- Joint working, partnerships and joint procurement
- Waste prevention and education to encourage participation

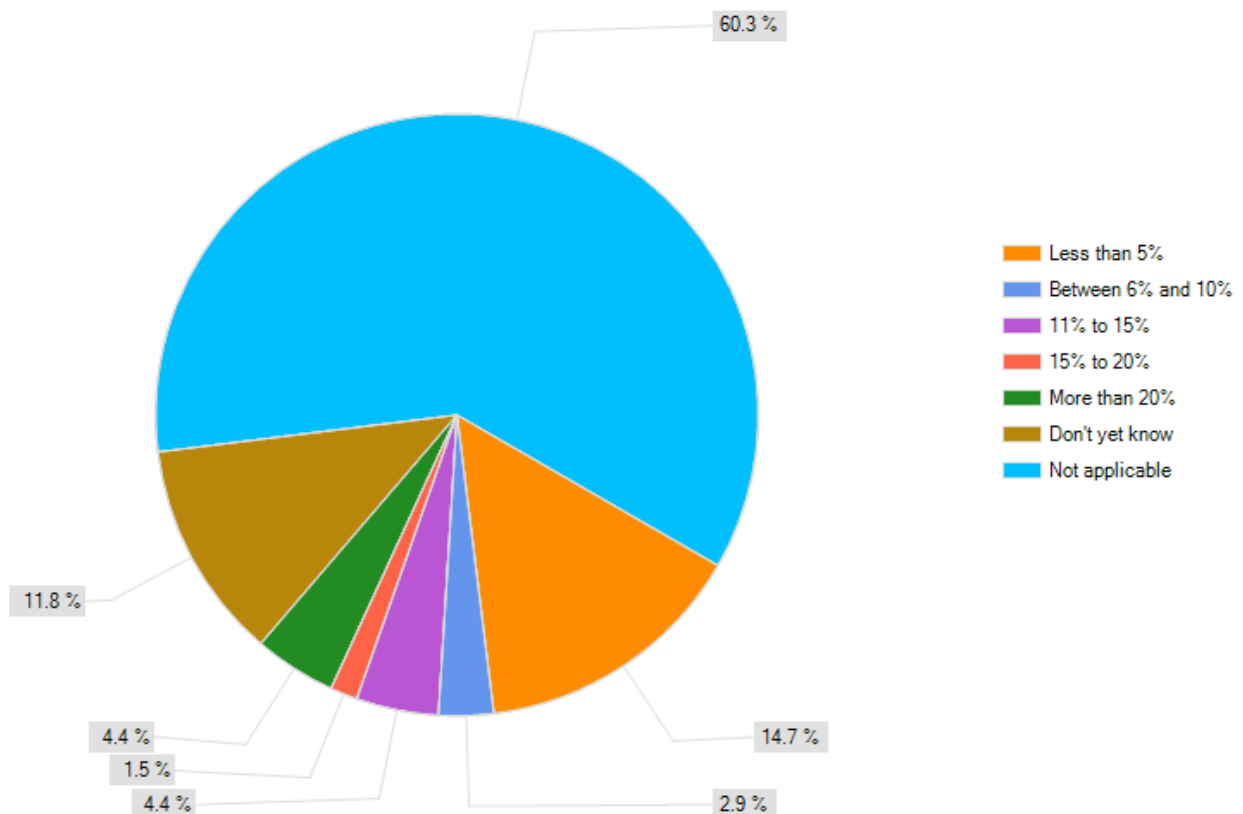
The survey asked about whether councils charge for the following services and the results are as follows:

Answer Options	Yes	No but will do within the next 1-2 years	No
Supply of bins	37	13	39
Bulky waste collections	78	3	14
Clinical waste collections	9	2	58
Trade waste collections to schools and hospitals	64	2	10
Green waste collections	27	8	55
Food waste collection	2	0	55
Black bags	5	0	46

On employment related matters within the next 12 months, 39.5% expect natural wastage, 17% expect to implement a recruitment freeze, 26% voluntary redundancy and 12% compulsory redundancy. 49% of authorities have indicated that they intend to implement none of these. Compared to the survey findings from 2012 where 47% expected natural wastage, 26% expected a recruitment freeze, 34% expected voluntary redundancy and 8% expected compulsory redundancy; this year's figures show a slightly improved expectation in relation to staffing issues except from compulsory redundancies which may be due to the fact that the majority of the staffing reductions from natural wastage, voluntary redundancy and recruitment freeze may have already been made.

Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:

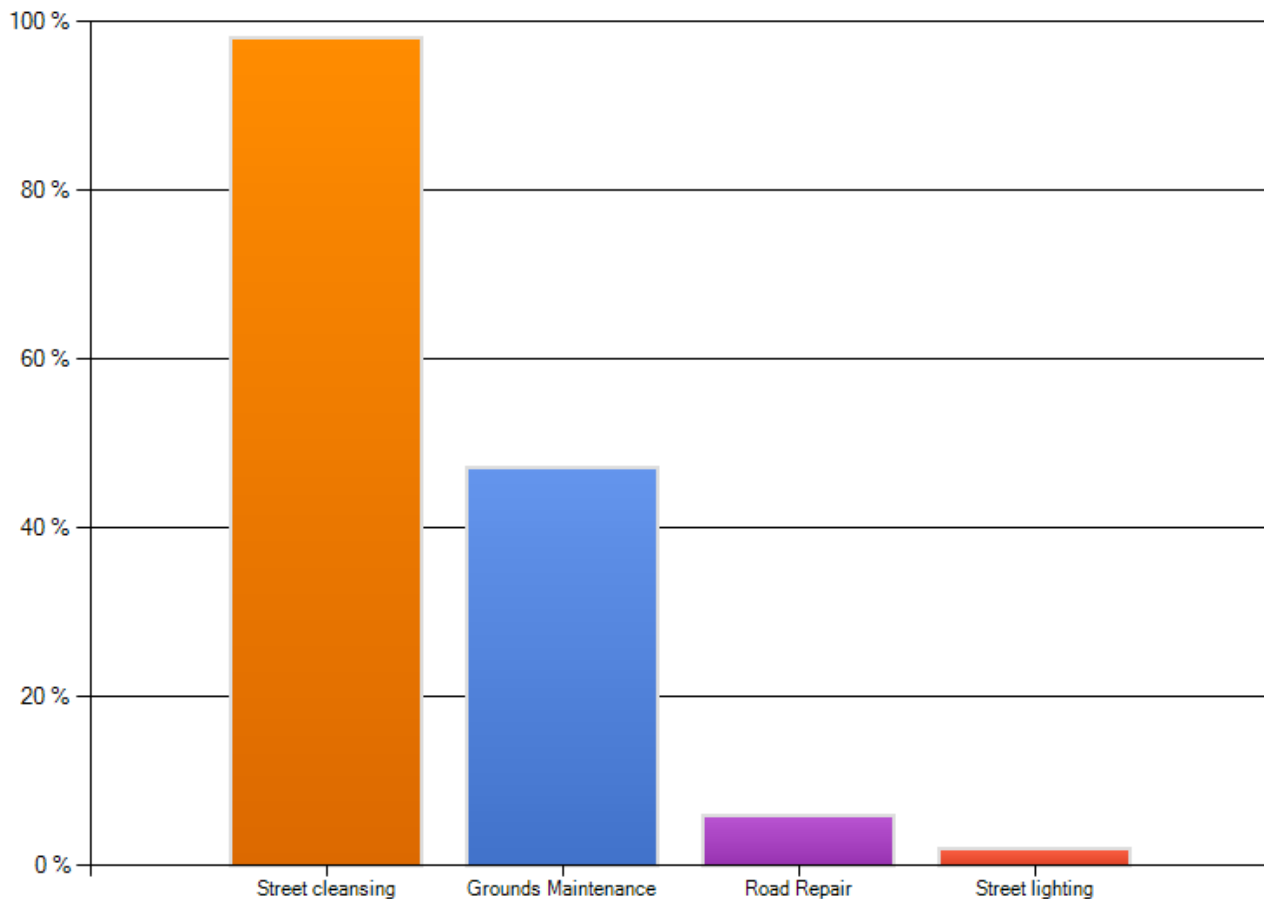
**If your service area is subject to redundancy measures what percentage of staff do you expect to lose from the service?**



72% currently manage their service in-house, 1% via joint waste authorities and 27% are external. Of those respondents whose service is managed externally, the survey asked how long the contract is for and the majority were 5-7 year (31%) or 7-10 years (38%). 64.5% indicated that they have an option to extend the contract.

Over 55% of respondents indicated that their refuse service is integrated with other service areas and of those this includes the following services being jointly managed:

**If yes, which services are jointly managed within your waste department?**

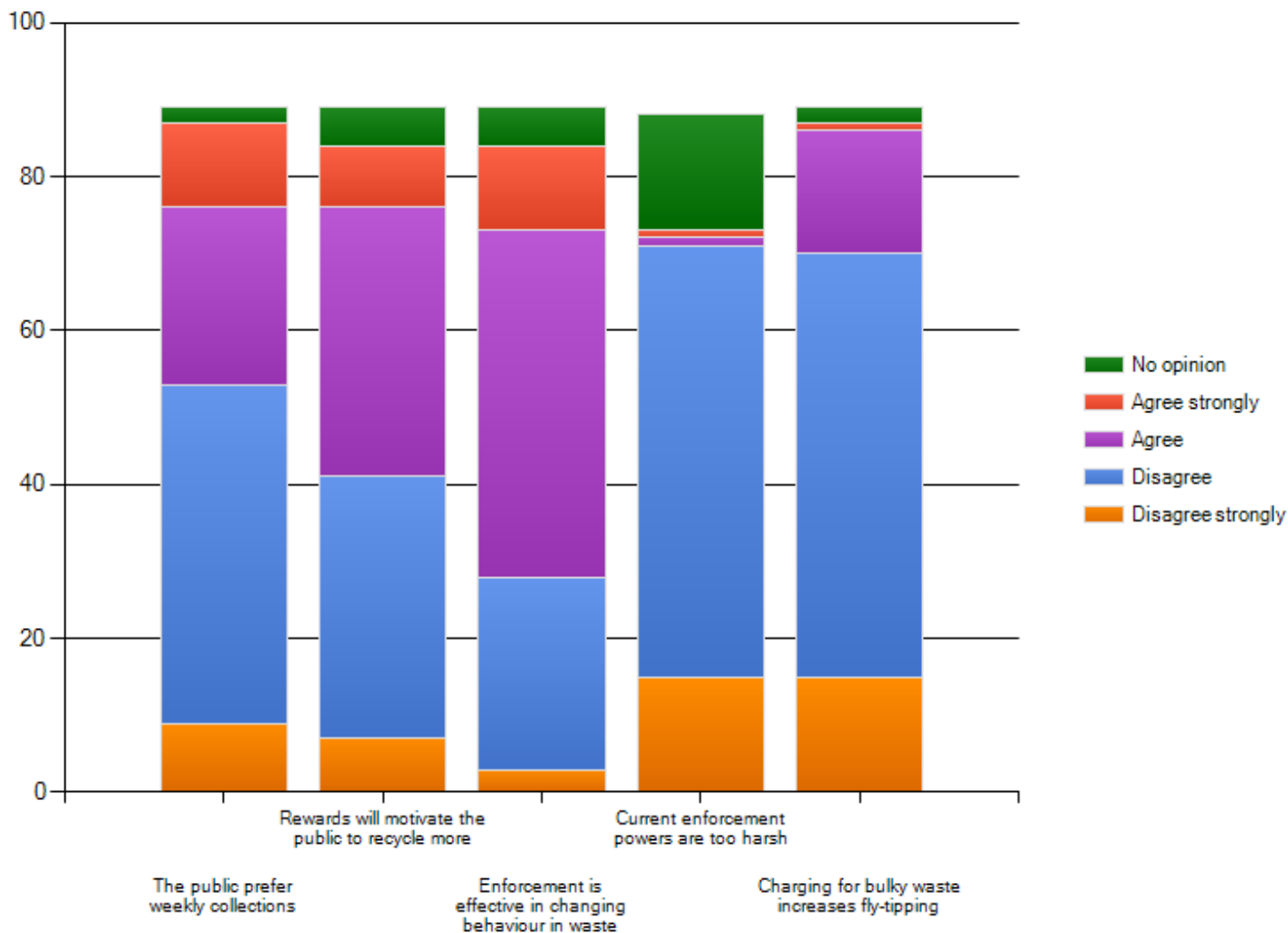


Of those respondents who indicated that they aren't integrated with other service areas at the moment, 27% expect to become part of an integrated street scene service in the near future.

**d) Your opinions**

The chart below shows the breakdown of respondents who agree/disagree with the statements.

### Please give your opinion on the following statements



### e) Staffing

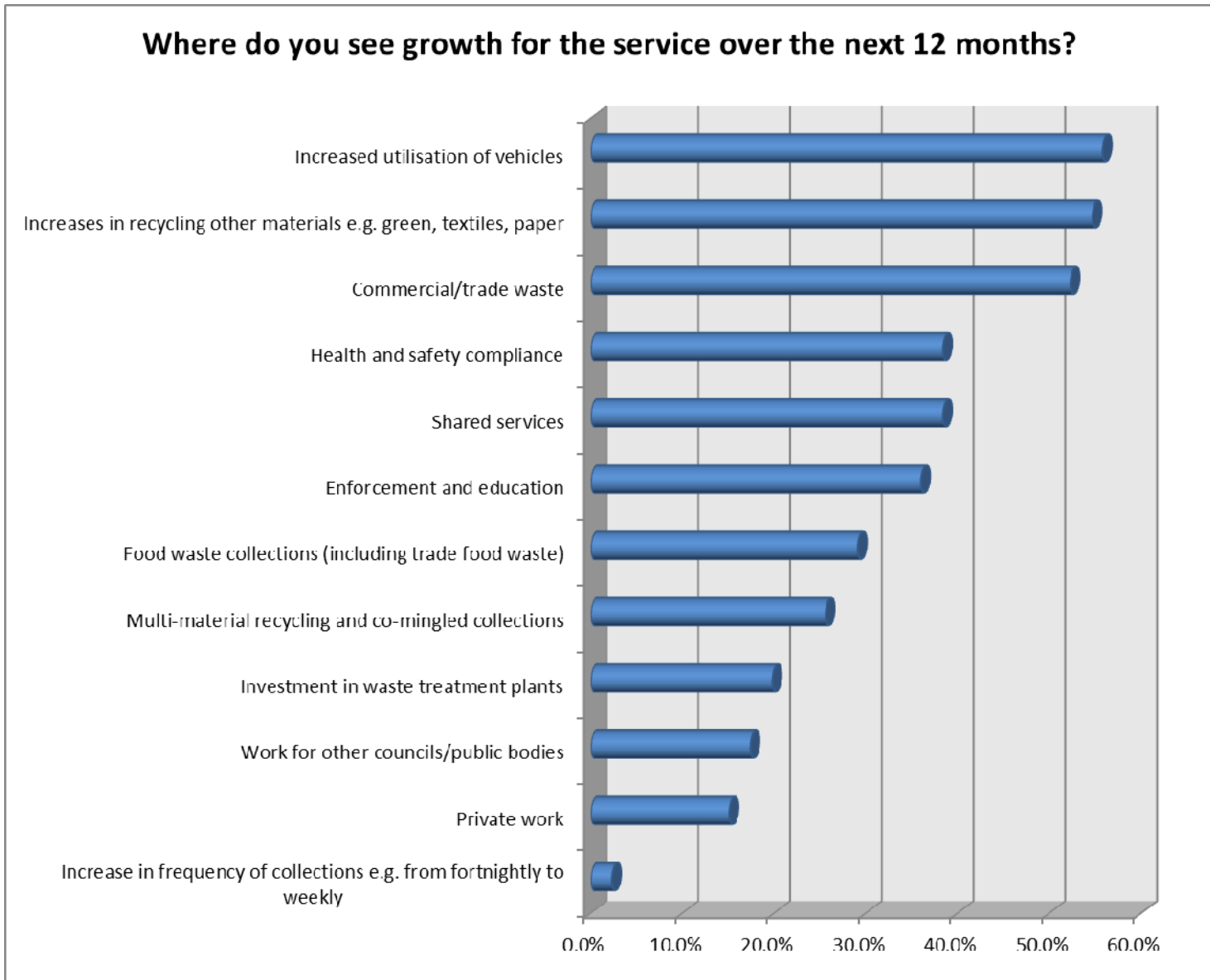
Members were asked whether they thought that staff absence levels are at an acceptable level. The responses are shown in the chart below:

Answer Options	Response Percent
Too high	22.7%
Slightly above average	23.9%
About average	30.7%
Slightly below average	13.6%
Very low	9.1%

Only 3.5% envisaged an increase in the training budget over the next 12 months, with 23% stating that this will decrease and 73% stating that this will stay the same. This is a declining trend compared to the 2012 survey where 5% expected it to increase and 15% stating that this will decrease.

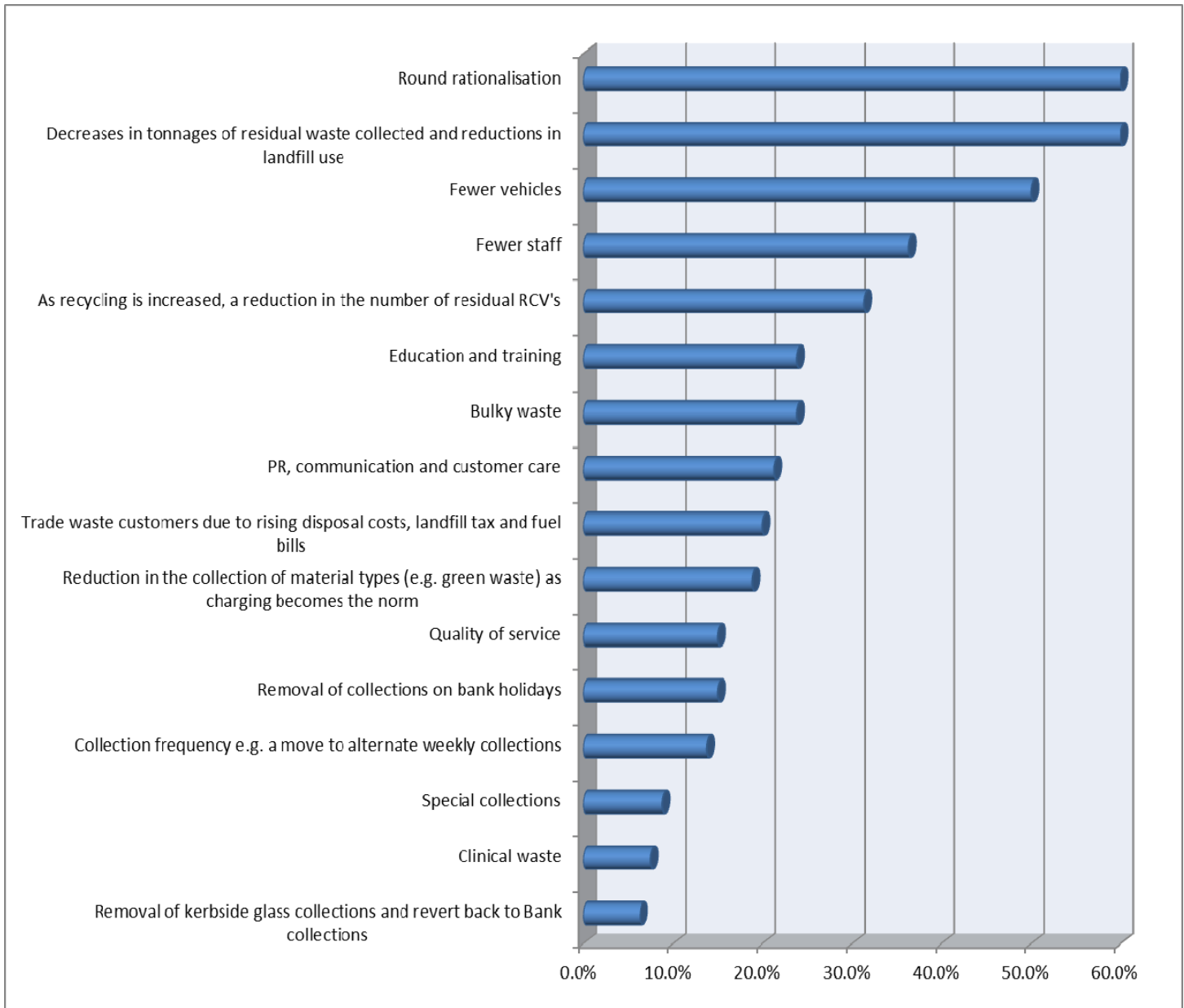
## f) Future areas of work and service reviews

Respondents were asked where they see growth for the service over the next 12 months and responses included:



Some of the main changes in the ranking of these growth areas compared to 2012 include an increase in shared services, health and safety compliance and commercial/trade waste.

Respondents were then asked where they see future decreases in work for the service:



56% indicated that they have income generation schemes from their waste service and of these, the majority (97%) relating to selling recycling materials and others including renewable energy (9%), anaerobic digester (6%) and solid fuel recovery (3%). When asked if respondents had undertaken a service review recently, 44% stated that they have completed this, 29% stated that they have a review which is underway and 21% stated that they will be doing so in the next 1-2 years. Only 7% said 'no' and they won't be undertaking a review in the next 1-2 years.

Respondents stated that the reviews involved the following:

Answer Options	Response Percent
Route optimisation	82.2%
Utilisation of vehicles	76.7%
Service re-design	68.5%
Review of working time/rota's	61.6%
Review of productivity/work study	54.8%
GPS tracking	52.1%
CRM handhelds	31.5%
Using systems thinking techniques	27.4%
Eco drive vehicle monitors	19.2%

## The Association for Public Service Excellence

APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email [enquiries@apse.org.uk](mailto:enquiries@apse.org.uk).

Our national advisory groups include:-

- Building cleaning
- Catering
- Housing, construction and building maintenance
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Service delivery models
- Service transformation and performance management
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing