



Welsh local Government Association
Waste Improvement Programme

Executive Summary Waste Finance Data Report 2021-22

January 2024



LLWYS CYNGHORAL CYMRU
THE WELSH LOCAL GOVERNMENT ASSOCIATION

Mae'r ddogfen hon hefyd ar gael yn Gymraeg

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Summarised Key Findings

The height of the COVID-19 pandemic (2020/21) resulted in a significant increase in Welsh council waste service expenditure due to the adjustments of working practices and systems in order to adhere to restrictions. More recently 2021/22 data shows Welsh councils experiencing a journey back towards 'normal' with restrictions being lifted and overall net expenditure decreasing by 3.8% in real terms (adjusted for inflation). Recycling rates have somewhat plateaued over the last few years which is likely to be linked to the temporary closure of household waste recycling centres, the suspension of some waste services (most notably green waste), and the increase in household waste presented at the kerbside due to millions of people required to stay at home during the height of the pandemic.

Recycling Rate

- Overall re-use, recycling, and composting rates decreased by 0.2 percentage points, decreasing from 65.4% in 2020/21 to 65.2% in 2021/22.
- In 2021/22 Rural councils achieved an average recycling rate of 67.3%; the highest average recycling rate when compared to Valley (65.7%) and Urban councils (63.7%).

Municipal Solid Waste¹

- Between 2020/21 and 2021/22 overall gross expenditure on waste services increased by £16m, increasing to £332,984,024. Gross expenditure in real terms saw a smaller increase of 1.2%.²
- Net expenditure in real terms decreased by 3.8% over the same period. This was the first decrease in real terms since 2017/18. The decrease can be somewhat attributed to a part return to 'normal' following the COVID-19 pandemic which resulted in additional costs for Councils.
- MSW arisings for 2021\22 were lower than pre pandemic figures continuing a longer-term waste reduction trend.

Household Waste³

- Between 2020/21 and 2021/22 overall net expenditure on household waste services increased by £1.8m, increasing to £270.7m. Net expenditure in real terms decreased by 3.3%.
- Between 2020/21 and 2021/22 household waste arisings decreased slightly, decreasing to 1,306,273t. This figure is similar to the 2019/20 (pre pandemic) figure of 1,303,765t.

¹ Includes household waste service elements (dry recycling, organic, residual, HWRC and Bring), trade waste, clinical waste, bulky waste, and other costs associated with MSW.

² Adjusted for inflation. CPI for the 12 months from April 2021 to March 22 was 3.98%

³ Includes, Dry recycling, Food waste, Green waste, Residual, Household waste Recycling Centre and Bring site services

Dry Recycling

- Kerbside dry recycling costs decreased by £1.8m (2.5%), decreasing to £72.7m. Net expenditure in real terms decreased further, decreasing by 6.5%.
- During 2021/22 blueprint councils collectively achieved a recycling rate of 67%, 2.8 percentage points higher than other⁴ collection methods.
- When grouped together, Blueprint councils' dry recycling service median cost per hh was £1.17 higher than other collection methods, 58 pence higher than the Wales median cost of £51.16 per household.
- During 2021/22 Urban councils collectively demonstrated the lowest median net cost per hh on dry recyclate collection costs, at £32 per hh. Rural councils were £10 per hh more expensive than the Wales median (£41).
- During 2021/22 Blueprint councils on the whole received the highest median income from sale of dry recyclate on a per tonne basis when compared to other methods. Blueprint councils demonstrated a median cost per tonne of £81.85, £12 more than other collection methods when grouped together.
- Overall income from the sale of dry recyclate more than doubled between 2020/21 and 2021/22, increasing to £12.2m, the highest income recorded to date.

Organic Waste

- 2021/22 saw a slight increase in overall organic waste service costs, with net expenditure increasing to £56.2m when compared to the previous year. Net expenditure in real terms decreased by 3.4%.
- Over the last ten years, green waste income has continued to increase year on year, with 2021/22 seeing an increase of £1.8m (51%) when compared to 2019/20.⁵
- Councils who charge for their garden waste collections have a median cost per tonne of £83; this is £75 lower than the median cost per tonne of councils who do not charge.

Residual Waste

- 2021/22 saw a slight decrease in overall residual waste service costs, with net expenditure decreasing by £44k when compared to the previous year. Net expenditure in real terms decreased by 4%.
- 2021/22 saw the lowest landfill disposal net expenditure on record, highlighting a longer-term trend.

⁴Other includes, single, twin stream, multi stream and kerbside sort – See [Appendix A](#) for more information.

⁵ Comparison is made with 2019/20 (pre pandemic) due to some councils suspending charging during 2020/21 (height of pandemic)

- Councils who provide three and four weekly residual waste collections collected a median figure of 53kg per hh less than those providing fortnightly collections.
- Councils who collect three or four weekly had a 2% higher average recycling rate than those who collected fortnightly; 67.3% compared to 65.3% respectively.
- On a kg per hh basis (median) councils who collected residual waste using bags/sacks collected 96kg less residual waste than those who collected using wheeled bins.
- Councils who used bag / sacks had a 5% higher average kerbside recycled and composted rate.

Household Waste Recycling Centres

- During 2021/22 overall HWRC net expenditure increased to £42.6m, increasing by 8.6% (£2.1m). Expenditure in real terms saw a smaller increase of 4.6%.
- HWRC median cost per hh increased by £2.20, increasing to £31.20 per hh when comparing to 2020/21. The median cost per hh has returned to a similar figure to that of 2019/20 (pre pandemic).
- Between 2020/21 and 2021/22 there was a 16.8% increase in throughput of recycling and residual waste at HWRC's.
- HWRC tonnage increased by 46,026 tonnes whereas overall kerbside tonnage (dry, organic and residual) decreased by 52,612t highlighting a shift in tonnages between kerbside and HWRC following the pandemic.

Caveats

- All twenty-two councils are represented in this report; however, it is important to note that Wrexham Council figures for 2021/22 are estimated.
- In some cases, council figures in isolation may appear anomalous and may not present the whole picture; this can be due to apportionment. Apportionment may take place between shared services and between the collection, transfer, and treatment process.
- Figures in this report include additional expenditure in relation to councils' response to the COVID -19 pandemic. A small number of councils were unable to include covid related expenditure in their WasteDataFlow finance return (Blaenau Gwent, Ceredigion, Torfaen and Wrexham) and for some councils no covid costs were incurred.

Introduction

2021/22 data shows Welsh councils experiencing a journey back towards ‘normal’ following the height of the pandemic in 2020/21. However, it is clear that some impacts of the pandemic have continued into 2021/22, with some adaptations to services carrying through to 2021/22. With many people likely to continue working from home in the future, it is possible that standard service, expenditure and performance will not return to pre pandemic norm.

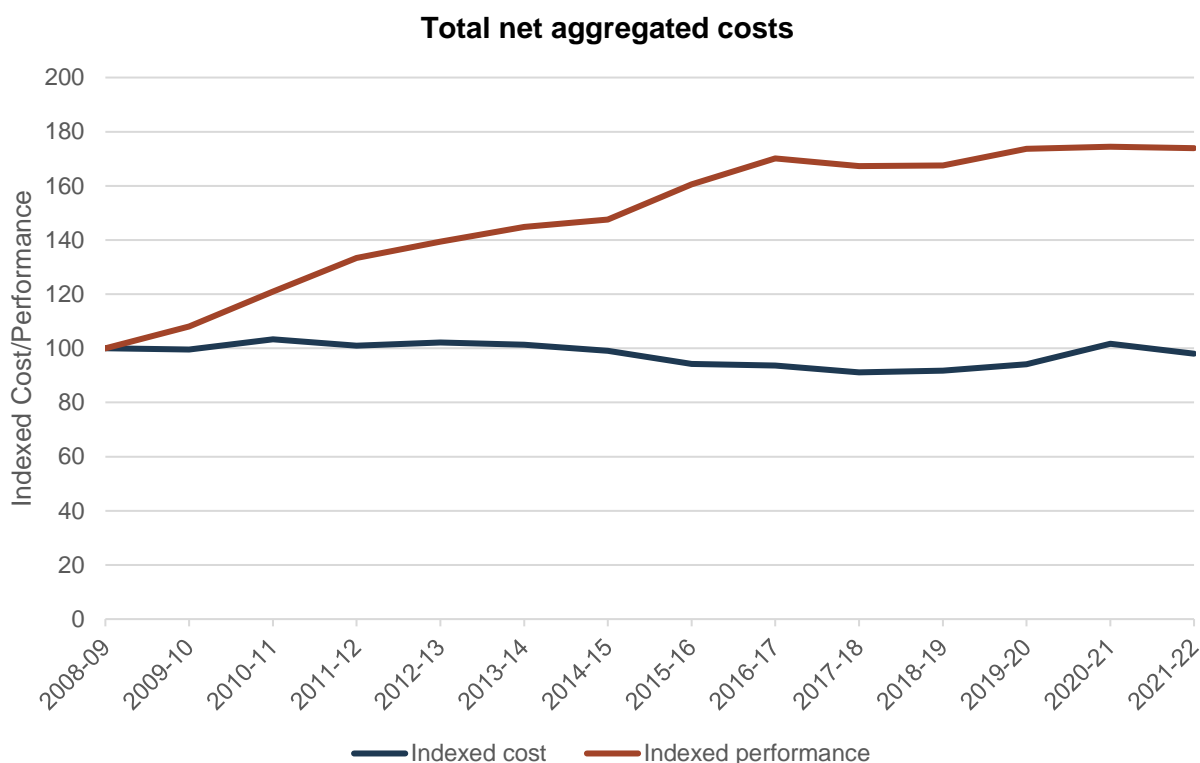


Figure 1

Figure 1 above shows how net expenditure on waste services in Wales has changed since the finance project began in 2008/09⁶. Expenditure in real terms has remained fairly stable over the past fourteen years. More recently, between 2018/19 and 2020/21, expenditure has increased with 2020/21 seeing the largest indexed net expenditure recorded since 2012/13, highlighting the financial impact the pandemic had on waste services. 2021/22 saw the first decrease in real terms since 2017/18, reflecting a return towards ‘normal’ following the height of the pandemic.

During the same period, recycling rates increased significantly, increasing from 35.6% in 2008/09 to 65.2% in 2021/22. The graph above however does highlight a plateauing of the recycling rate over the last few years, between 2019/20 and 2021/22. The plateauing could be linked to councils’ response to the pandemic when restrictions were put in place, including some suspended services.

⁶ Costs have been adjusted for inflation and are indexed using the 2008/09 data as a baseline

Key expenditure changes between 2020/21 and 2021/22

The table below shows the net expenditure on waste services in Wales between 2020/21 and 2021/22. The final column highlights the difference in real terms. During this period, all household waste service expenditure decreased in real terms apart from Household Waste Recycling Centre's which increased by 4.64%. It is important to note that waste services do not necessarily increase with inflation, they are primarily driven by staff costs, transport and fuel costs, and capital investment, all of which are driven at different rates.

Expenditure on waste services	2020/21 (£)	2021/22 (£)	Difference (£)	Diff (%)	Real terms % Diff Inflation = 3.98%
Total Gross exp	316,732,160	332,984,024	16,251,864	5.13%	1.15%
Total Net exp	283,348,945	283,826,107	477,162	0.17%	(-) 3.81%
Net exp on Household waste services	268,818,958	270,654,288	1,835,330	0.68%	(-) 3.3%
Dry recycling (net)	74,563,560	72,716,141	(-) 1,847,419	(-) 2.48%	(-) 6.46%
Organic waste (net)	55,866,396	56,189,247	322,851	0.58%	(-) 3.4%
Residual waste (net)	98,192,385	98,148,534	(-) 43,850	(-) 0.04%	(-) 4.02%
HWRC (net)	39,244,209	42,627,675	3,383,466	8.62%	4.64%
Bring (net)	952,408	£972,691	20,283	2.13%	(-) 1.85%

Figure 2 below shows the difference in total household waste net expenditure for all councils between 2020/21 and 2021/22. Ten councils demonstrated a decrease in net expenditure whereas twelve councils demonstrated an increase.⁷

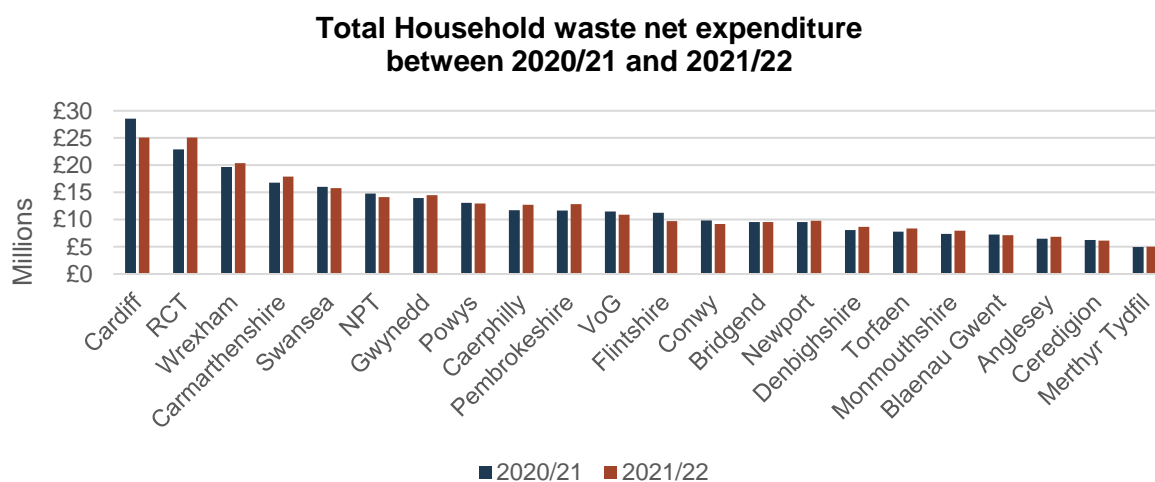


Figure 2

⁷ Based on WDF waste finance figures submitted by councils. Note that some councils have included additional covid costs in 2020/21 and some in 2021/22 – this may affect increases and decreases between the two years.

Grants

Figure 3 below shows that the level of funding through the Sustainable Waste Management Grant (SWMG) decreased over the last 4 years, whilst overall net expenditure increased. During this period, the rise in the rate of inflation, living costs, energy costs and increased service demand has meant councils have put more resources into their services themselves, creating further service budget pressures. It will be essential that councils continue to make efficiency savings as the gap between grant funding and expenditure increases. In the future Extended Producer Responsibility (EPR) should contribute to the running of services extending the polluter pays principle, meaning that public money could be focussed on other services.

SWMG allocation and MSW net service expenditure

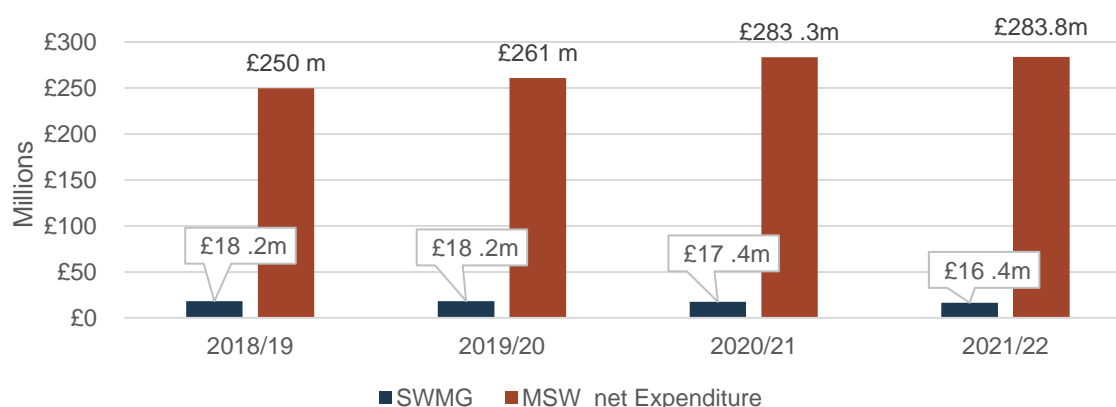


Figure 3

Key Performance changes

Overall re-use, recycling, and composting rates decreased from 65.4% in 2020/21 to 65.2% in 2021/22. This is slightly higher than the rate in 2019-20 (65.1%). Ten councils (out of twenty-two) reported an increase in their recycling rate, with sixteen councils achieving 64% or higher.

Wales recycling rate

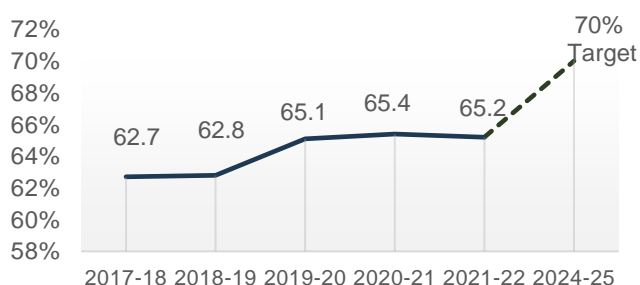


Figure 4 shows the Wales recycling rate increasing between 2017/18 and 2020/21. The recycling rate has plateaued over the last few years which is likely to be linked to the pandemic. It is clear that there is still some way to go for Wales to achieve 70% by 2024/25. It is likely that extra resources and interventions will be required for Welsh councils to achieve the 70% target by 2024/25.

Figure 4

Figure 5 below demonstrates the average recycling rates achieved in 2021/22 when grouped by rurality⁸. Rural councils achieved an average recycling rate of **67.3%**; the highest average recycling rate when compared to Valley (65.7%), and Urban councils (63.7%). The graph

⁸ Average recycling rates may differ slightly due to rounding.

shows the collective urban recycling rate being notably lower than the national average. This could be due to the presence of high-density housing and flats with lack of space and communal waste facilities, including houses of multiple occupation (HMOs) and a high student population, all of which are harder to reach and problematic target areas for councils. Both rurality and socio-demographics can be contributing factors in recycling rates, both of which are out of a council's control.

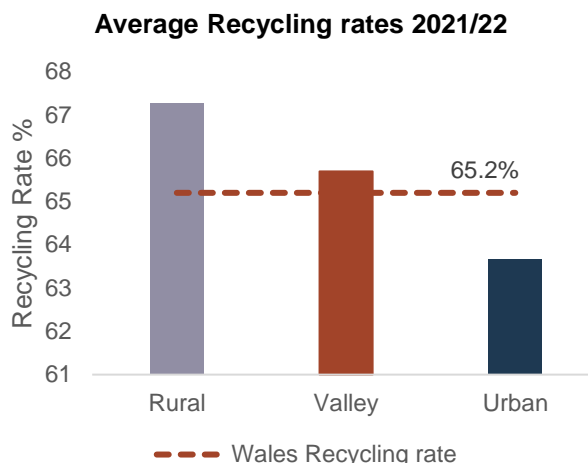


Figure 5

Between 2020/21 and 2021/22 Municipal

Solid Waste (MSW) arisings increased from 1,488,253 tonnes to 1,508,370 tonnes. However, 2021/22 arisings are lower than the pre pandemic (2019/20) figure of 1,512,105 tonnes, continuing a longer-term waste reduction trend. MSW arisings have decreased year on year since 2015/16 if we disregard 2020/21 (height of the pandemic), highlighting a reduction in MSW waste over the last seven years. This could be a result of a number of factors, including but not limited to; behaviour change, residual waste restrictions, enforcement and improved kerbside recycling services.

During the same period (2020/21 and 2021/22) overall household waste arisings decreased from 1,313,339 tonnes to 1,306,273 tonnes. This figure is similar to the 2019/20 (pre pandemic) figure of 1,303,765t, highlighting a return towards 'normal'. Data from WDF finance returns suggests that the pandemic has interrupted the Wales household waste reduction pathway target of 1,289,384 tonnes⁹ for 2021/22. With many people likely to continue working from home in the future, resulting in more waste presented at the kerbside, it may be more challenging to meet future household waste reduction targets. It will become increasingly important that councils implement interventions beyond reducing residual waste, for example increasing repair and re use.

Dry Recycling

Between 2020/21 and 2021/22 kerbside dry recycling service costs decreased by £1.8m, decreasing to £72.7m, a decrease of 2.5%. Net expenditure in real terms decreased by 6.5%. The decrease in expenditure can be partly attributed to a significant increase in the sale of dry recyclate during 2021/22. During the same period, the mass of dry recyclate collected decreased by nearly 13,000 tonnes (4%). This is likely to be due to a significant increase the year before; the height of the pandemic where lockdown restrictions required people to stay at home resulting in an increase in kerbside tonnage. 2021/22 saw restrictions lifted and a part return to 'normal' which is reflected in the reduction of dry recyclate collected from the kerbside.

⁹ Source: [Towards Zero Waste, Welsh Government](#)

Figure 6 demonstrates dry recycling service costs per hh and recycling rate grouped by collection method¹⁰ Data shows that during 2021/22 blueprint councils collectively achieved a recycling rate of 67%, 2.8 percentage points higher than other¹¹ collection methods. When grouped together, blueprint councils' dry recycling service median cost was £51.74 per hh, £1.17 higher than other collection methods and 58 pence higher than the Wales median cost of £51.16 per hh.

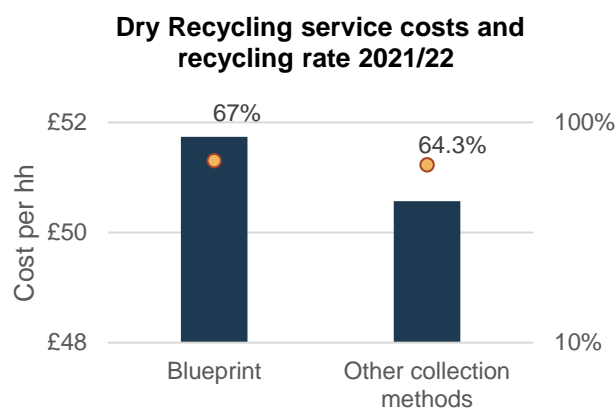


Figure 6

Figure 7 below shows wide variation in dry recycling service costs. Blueprint councils demonstrate the highest cost per hh but also demonstrate some of the lowest costs. There are many factors which contribute to a wide range of cost variations, these factors may include collection methods, rurality, frequency, vehicles, outsourced / in house management etc. Service performance, in terms of mass of dry recyclate collected¹² as a proportion of total MSW, is shown as orange lines on the graph, plotted using the axis on right hand side of graph; again, wide variation can be seen.

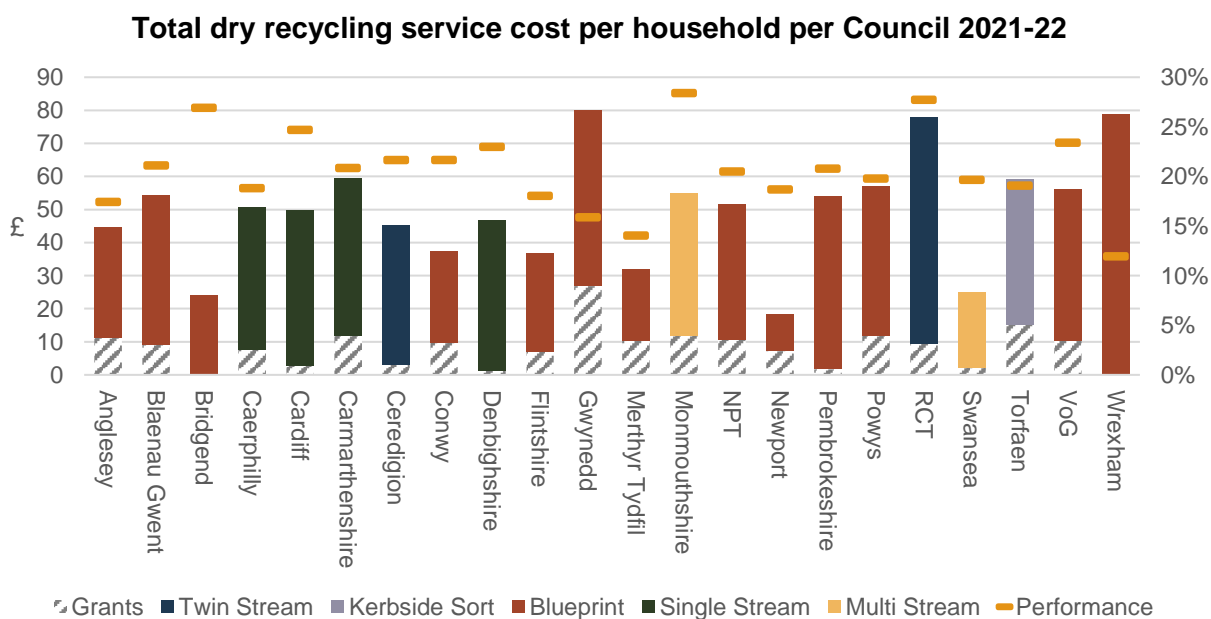


Figure 7

¹⁰ Refer to Appendix A for more information on service detail.

¹¹ Other includes, single, twin steam, multi stream and kerbside sort) – See appendix for more information.

¹² This does not take into account any contamination/rejects.

Collection costs

Between 2020/21 and 2021/22 dry collection service costs increased, increasing from £56.2m to £60.2m. Figure 8 below shows the dry recycling net collection cost per hh. Urban councils demonstrate the lowest median net cost per hh at £32 per hh. For valley and rural councils the figures are higher at £41 per hh and £51 per hh respectively. Rural councils were £10 per hh more expensive than the Wales median (£45) suggesting that rurality, a factor which is out of councils' control can be a contributing factor in higher collection costs. This is likely to be due to population density, mileage, transport costs etc. It is worth noting that six out of the ten rural councils were blueprint compliant during this period.

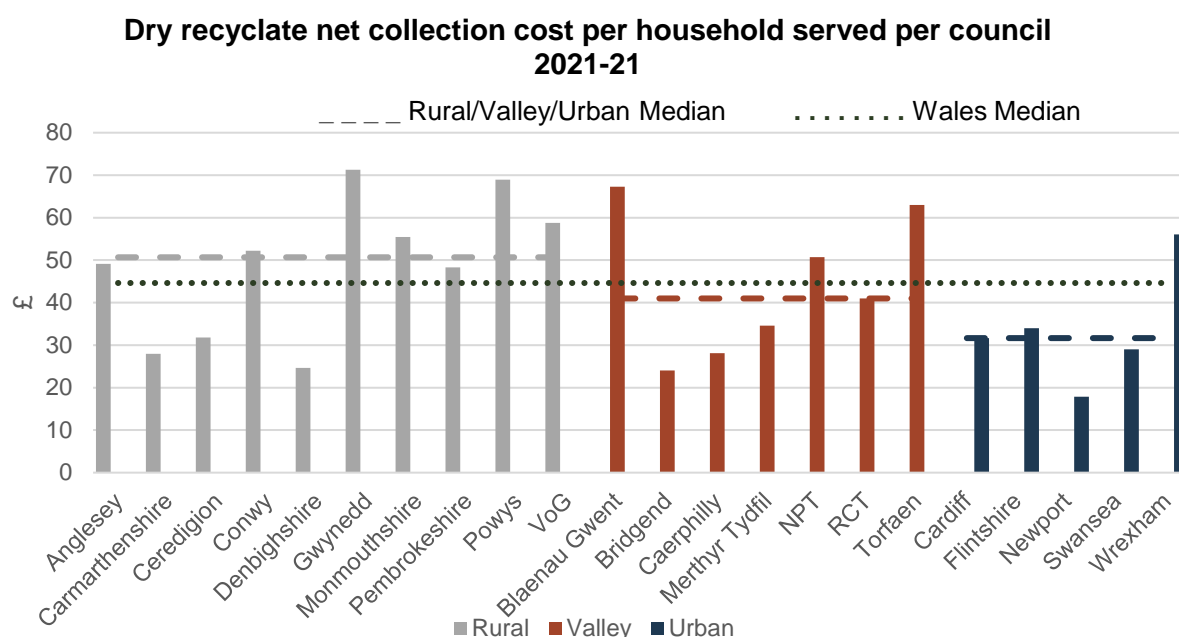


Figure 8

Income from sale of Dry Recyclate

Overall income from the sale of dry recyclate more than doubled between 2020/21 and 2021/22, increasing to £12.2m, the highest recorded since baseline data began in 2008/09. The significant increase in sale of dry recyclate can be attributed to an increase and recovery of market rates resulting in greater prices per tonne being received by councils following the pandemic. Improved kerbside services would likely improve contamination rates and therefore increase the income from the sale of dry recyclate for some councils. This increase follows a decrease in 2020/21 due to a reduction in the price per tonne for materials as a result of the pandemic.

Figure 9 below shows the amount of income received from the sale of collected materials on a per household served basis. Income varies significantly across the group and reflects the differing service configurations and contractual arrangements in place for the treatment of the material collected. For contractual reasons, it is possible that some councils' recyclate income has been netted off when recording the figures and therefore showing as no income. These variables mean that this data must be viewed as a starting point to interrogate differences and should not be relied on solely to explain each council's actual position.

Income from sale of dry recyclate per household served per council 2021-22

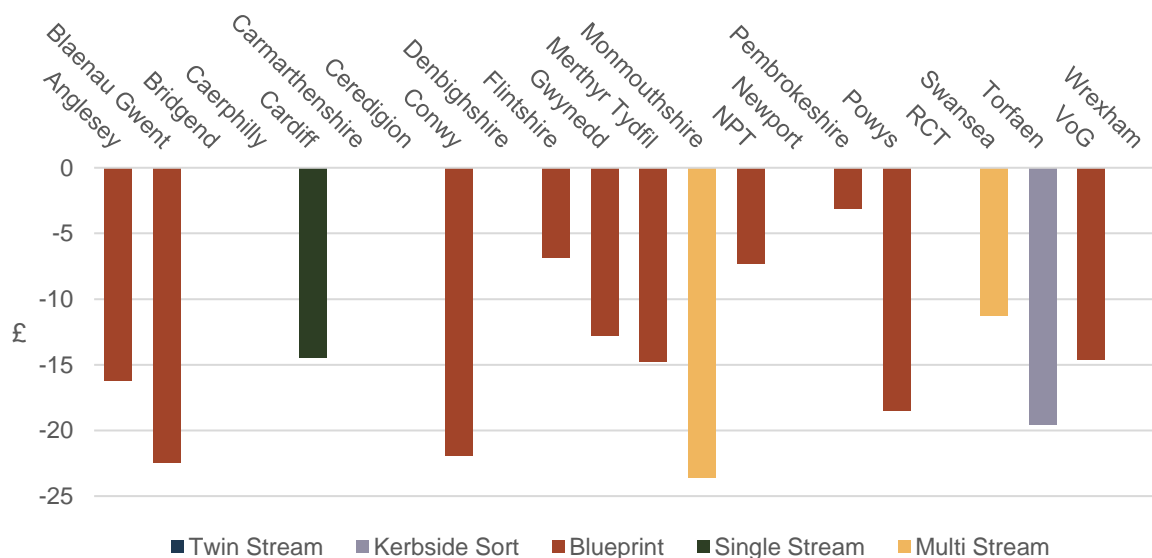


Figure 9

According to the data and noting the caveats above, blueprint councils on the whole received the highest median income from sale of dry recyclate on a per tonne basis when compared to other methods, which could suggest higher material quality and less contamination/non target materials from blueprint councils. Blueprint councils demonstrated a median cost per tonne of £81.85, £12 more than other collection methods when grouped together.

Organic Waste

During 2021/22 organic waste saw a slight decrease in both performance and expenditure in real terms. This follows a sharp increase the previous year which again can be attributed to the pandemic where people were required to stay at home resulting in more food and green waste being presented at the kerbside. The reduction during 2021/22 highlights a return towards 'normal', although many people continue to work from home and therefore more waste may continue to be presented at the kerbside compared to pre pandemic levels.

Food Waste

During 2021/22 overall food waste service costs increased by £1.7m, an increase of 4.7% and 0.68% when taking inflation into account. Figure 10 below shows variations in cost per hh, with costs ranging from £3.50 per hh to £41.60per hh. It should be remembered that in practice food waste is often collected with other waste streams, usually dry recycling for kerbside sort councils. In these cases, the figures are calculated using apportionment.

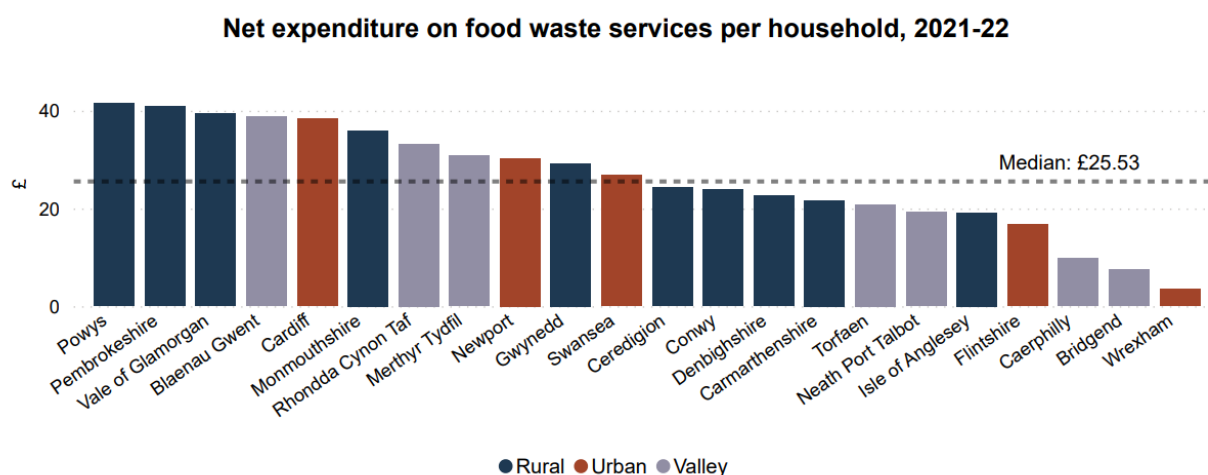


Figure 10

Overall, food waste collected at the kerbside reduced by 4,760 tonnes. Again, the reduction is likely to be linked to an increase the year before (2020/21) due to pandemic restrictions. As things started to return to 'normal' and people returned to work, this resulted in less food waste being presented at the kerbside. However, when comparing with pre pandemic data, food waste tonnage increased from 131,498 tonnes to 141,785 between 2019/20 and 2021/22. This could be due to an increase in participation as a result of people continuing to work from home and/or behaviour change with people using the correct receptacles to recycle their waste.

Green Waste

Overall green waste service expenditure decreased by £1.4m, a decrease of 7.5% and 11.4% when taking inflation into account. The decrease in expenditure can be attributed to a £1.4m increase in income from councils charging for the service.

Following the pandemic when some councils temporarily suspended their green waste collections in order to prioritise core services, 2021/22 saw a more 'normal' service in operation. Between 2020/21 and 2021/22, overall green waste tonnage decreased by 5,318 tonnes. However, when comparing with pre pandemic data (2019/20), green waste tonnage increased from 101,126 tonnes to 112,483 tonnes, highlighting an increase in participation. The increase in participation could be linked to behaviour change as more people spent time gardening during lockdown; 2021/22 data suggests that this carried on to some extent.

Figure 11 below shows variations in cost per hh. It is important to note that the cost is divided by the total number of households not the number of users or subscribers. Also, that in some instances figures are calculated using apportionment when collected with other waste streams. Variations in costs are likely to be influenced by a number of factors such as rurality, property type, collection frequency and whether charging is in place.

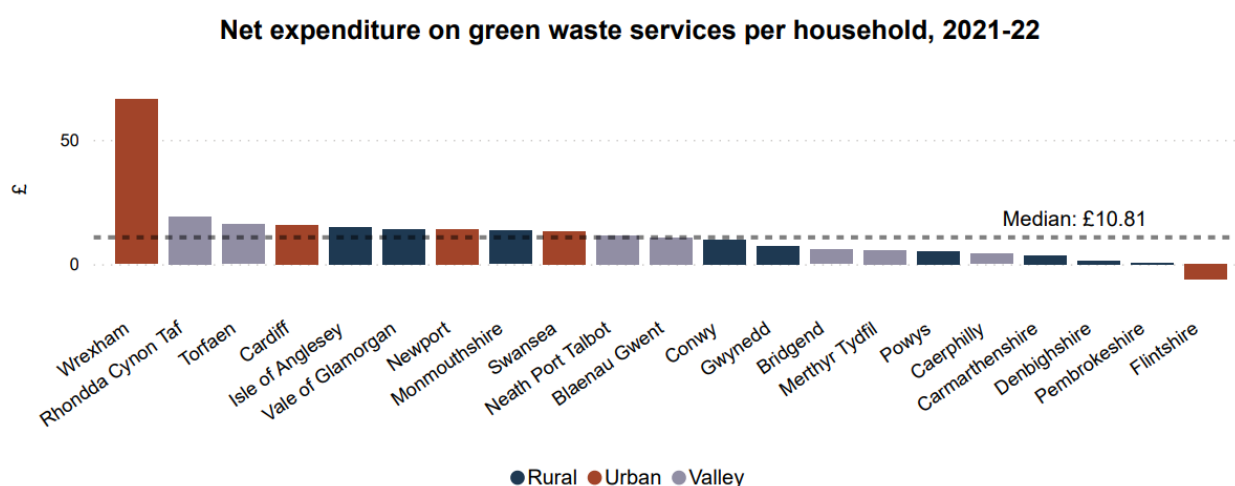


Figure 11

Charging / Non Charging

During 2021/22 half of Welsh councils charged residents for the collection of green waste from the kerbside¹³ via annual subscriptions. These councils include Anglesey, Bridgend, Carmarthenshire, Conwy Denbighshire, Flintshire, Gwynedd, Monmouthshire, Pembrokeshire, Powys, and Wrexham. Over the last few years an increasing number of councils have reduced their collections to include seasonal restrictions. For more information on service detail refer to [Appendix A](#)

¹³ Ceredigion also charge for the collection of green waste, but the service was suspended for the large part of 2021 following the pandemic and are therefore not present in the green waste charts.

The graph below compares councils who charge for the collection of green waste v's councils who do not charge, on a cost per tonne basis. The graph shows that the 5 councils with the lowest green waste service cost per tonne are councils who charge for the service. Councils who charge for garden waste collections have a median cost per tonne of £83; £75 lower than the median cost per tonne of councils who do not charge. Over the last ten years, green waste income has continued to increase year on year, with 2021/22 seeing an increase of £1.8m (51%) when compared to 2019/20¹⁴. It is worth noting that 8 out of the 11 councils who charged for green waste collections in 2020/21 were rural councils.

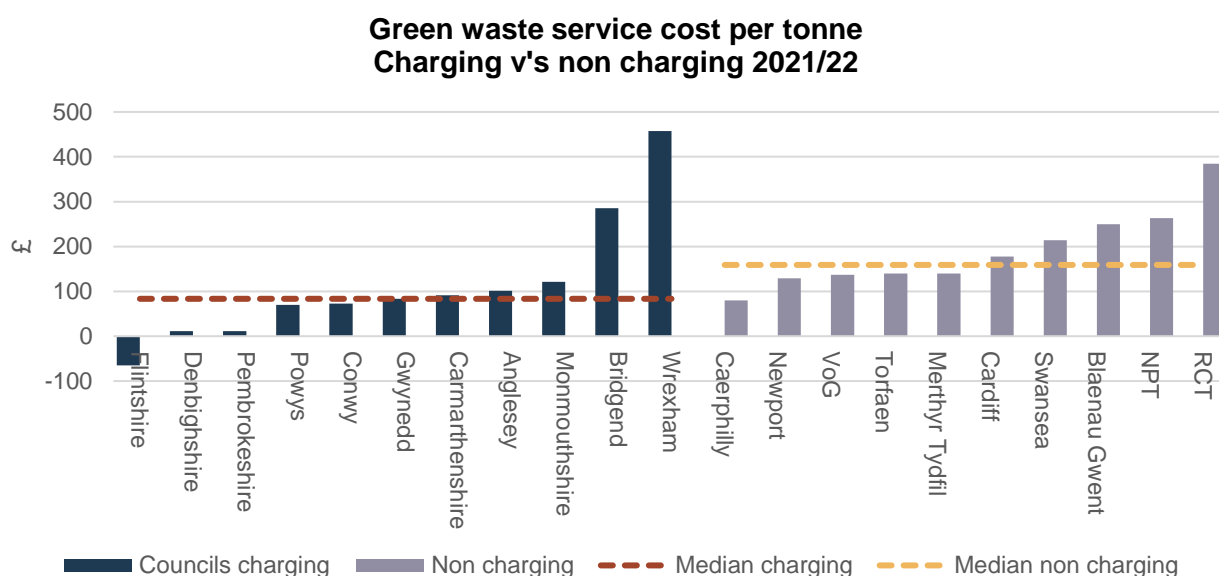


Figure 12

¹⁴ Comparison is made with 2019/20 (pre pandemic) due to some councils suspending charging during 2020/21 (height of pandemic)

Residual Waste

Between 2020/21 and 2021/22 expenditure on residual waste services remained largely unchanged, decreasing by £44k to £98.1m. Costs adjusted for inflation show a larger decrease in expenditure in real terms, a decrease of 4%. During the same period, the mass of residual waste collected decreased by nearly 30k tonnes. The reduction in residual mass follows a significant increase the previous year during the height of the pandemic when people were required to stay at home and HWRCs temporarily closed resulting in more waste being presented at the kerbside. The reduction in residual waste collected from the kerbside in 2021/22 could be linked to an increase in HWRC throughput following the reopening of HWRCs, highlighting a shift in tonnage. Residual mass has not returned to pre covid levels of 2019/20, but the reduction does suggest a part return to 'normal'. Despite restrictions being lifted, many people continued to work from home during 2021/22 which has likely led to more waste being presented at the kerbside than pre pandemic levels.

Figure 13 below shows the net expenditure on residual waste services per household during 2021/22. Variations in cost can be seen across the group and are likely influenced by a number of factors such as collection method, frequency, rurality, vehicles, mass collected, outsourced/in-house management, treatment method and differing contractual arrangements.

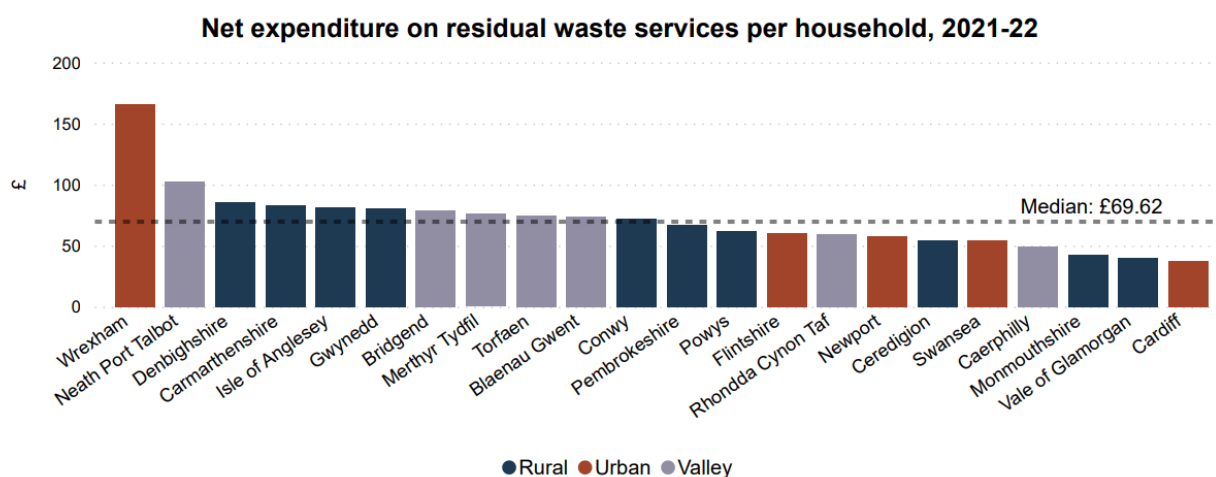


Figure 13

Residual Waste Frequencies

During 2021/22 all twenty-two Welsh councils collected residual waste on at least a fortnightly basis, with Angleseay, Blaenau Gwent, Ceredigion, Gwynedd, Pembrokeshire, and Powys collecting 3 weekly, and Conwy operating a 4-weekly service. Refer to [Appendix A](#) for further information on service detail.

Net Residual Waste Collection Cost per Household per Council 2021-22

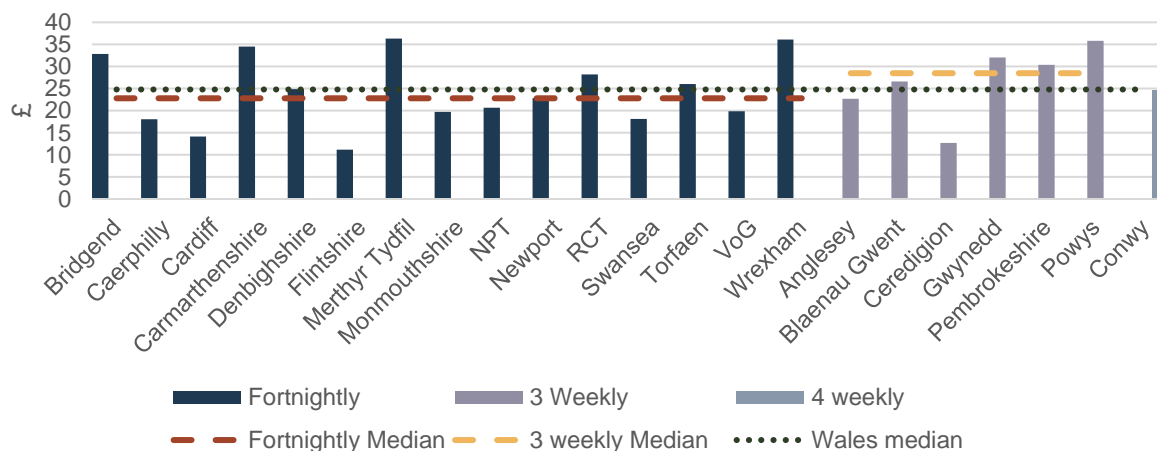


Figure 14

Figure 14 demonstrates residual waste collection costs on a per household basis. The graph highlights that councils who collect fortnightly have the lowest median cost per hh when compared to those who collect three or four weekly, £22.80, £28.48 and £24.80 respectively. Again, it is important to note that 6 out of 7 councils who collect three / four weekly are rural councils and therefore could naturally exhibit higher collection costs due to population density, likely resulting in higher mileage and transport costs.

Residual Mass Collected

Residual waste kg per hh collected Fortnightly v's 3/4 weekly collections 2021/22

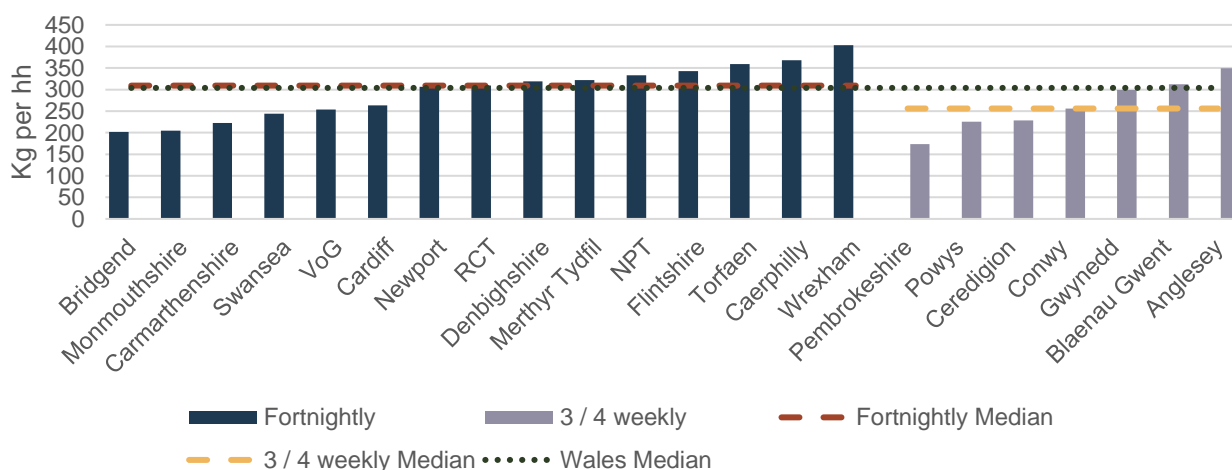


Figure 15

Figure 15 above demonstrates the residual mass collected per household in 2021/22 and compares councils who collect residual waste fortnightly with those who collect three or four

weekly. The graph shows that councils who provide three and four weekly residual waste collections collected a median figure of 53kg per hh less residual waste than those providing fortnightly collections. This suggests that three and four weekly residual waste collections encourage residents to reduce residual waste. Councils who collect residual waste three or four weekly have a 2% higher average recycling rate than those who collect fortnightly; 67.3% compared to 65.3% respectively. It is important to note that 6 out of the 7 councils who collect three or four weekly are blueprint compliant and are also rural councils; factors which may also contribute to mass collected.

When comparing councils by rurality, rural councils collected the lowest mass of residual waste during 2021/22 and collected the highest mass of dry recyclate from the kerbside based on kg per hh (median). Differences in mass collected at the kerbside could be due to many factors, including but not limited to frequency, capacity, receptacle provided, enforcement, dry recycling service collection method. Both rurality and socio-demographics (for example the presence of high-density housing, flats, student population, houses of multiple occupancy, age, and profile) can also be contributing factors in mass collected, all of which are out of a council's control.

Residual Waste Receptacle

During 2021/22, fifteen councils provided wheeled bins as standard¹⁵ for the collection of residual waste from the kerbside. Seven councils used bags or sacks as standard to collect residual waste from the kerbside, these councils include Bridgend, Carmarthenshire, Ceredigion, Pembrokeshire, Monmouthshire, Swansea and Vale of Glamorgan. Refer to [Appendix A](#) for further information on service detail.

Residual waste	Median kg per hh collected	Median cost per tonne	Average kerbside recycled and composted rate
Wheeled bin	319kg	£236	36%
Bags/sacks	223kg	£238	41%
Difference	96kg	£2	5%

The data in this table and Figure 16 (below) suggests that councils who used bags / sacks to collect residual waste collected 96kg per hh (median) less waste from the kerbside than wheeled bin councils during 2021/22. Data highlights that costs for both bag/sacks and wheeled bin councils are similar, but notably, councils who used bag/sacks had a 5% higher average kerbside recycled and composted rate. Many councils who provide bags are rural councils with perhaps an older demographic population. Research has shown older demographics tend to be better recyclers. As mentioned earlier in the report, there are many factors that contribute to the mass collected at the kerbside including but not limited to frequency, capacity, receptacle provided, enforcement, dry recycling service collection method and unchangeable factors like demographics.

¹⁵ Some of the wheeled bin councils allow the use of bags for some households who are unable to use wheeled bins but for the purpose of this report these councils are categorised as wheeled bin councils due to that being the standard receptacle provided to households.

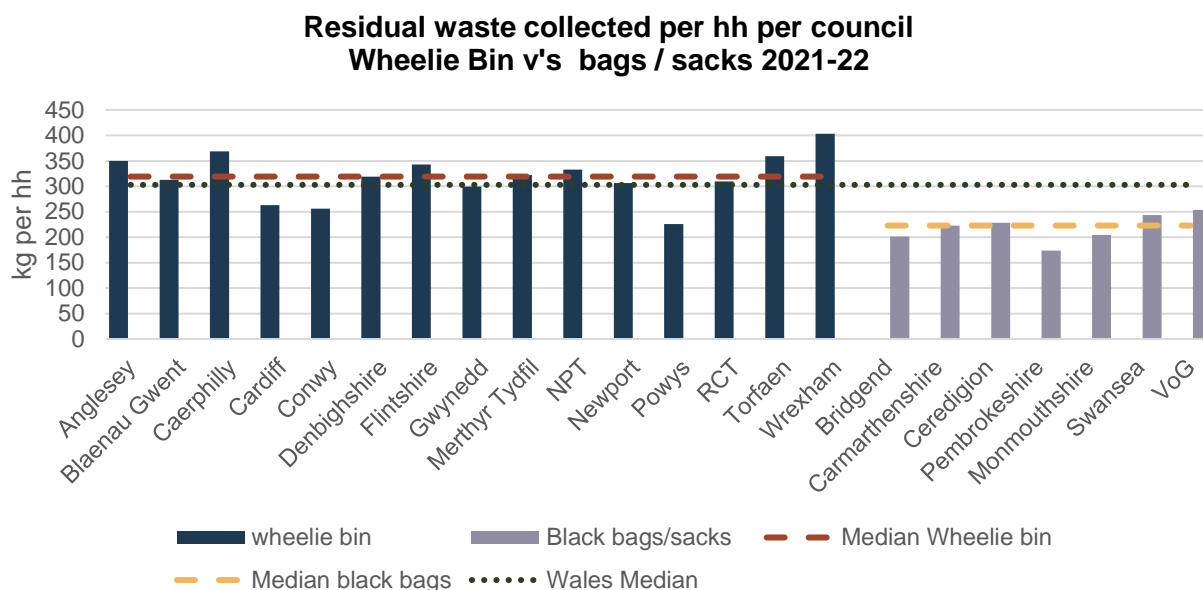


Figure 16

Residual Landfill Disposal

2021/22 saw the lowest disposal net expenditure on record highlighting a longer-term trend. Disposal net costs decreased by nearly £1.8m, decreasing from c£5.8m in 2020/21 to c£4m in 2021/22. A number of factors may have contributed to the reduction in residual waste sent to landfill over the years, including (but not limited to) Landfill Disposal Tax (LDT), which may have somewhat incentivised the diversion of waste from landfill to other less harmful methods of waste management like recycling, reuse and energy from waste. The impact of the landfill disposal tax on recycling and reuse is highlighted in the key findings of the Landfill Disposals Tax (Wales Act 2017) summary review¹⁶:

Between 2018-2022, recycling rates increased by 2 percent whilst LDT rates did not increase in real terms. Though LDT may have contributed to this increased recycling, stakeholders believed that other driving factors (specifically political signals that landfill is an unsustainable option and statutory local authority (LA) recycling targets) had a greater impact. (Eunomia/WG pg. 4)

¹⁶ An independent review of the Landfill Disposals Tax (Wales) Act 2017: summary can be found [here](#)

Household Waste Recycling Centres

Following the pandemic where household waste recycling centres (HWRCs) across Wales temporarily closed and booking systems were introduced, 2021/22 saw a return towards 'normal'. Some councils continued to use booking systems whilst making other improvements. Residual / general waste sorting stations recommenced and reuse shops at sites reopened to customers. During 2021/22, four new reuse shops were opened by councils in Blaenau Gwent, Cardiff, Carmarthenshire, and Monmouthshire.¹⁷

Between 2021/21 and 2021/22 overall HWRC expenditure increased by 8.6%, increasing to £42.6m despite an increase of £2.1m in income received by councils. Costs adjusted for inflation show a smaller increase in expenditure in real terms (4.6%). The increase follows a 7% decrease the previous year due to the pandemic and again indicates a part return to 'normal'. Data shows that 2021/22 HWRC overall expenditure has returned to that of pre pandemic (2019/20) levels, £42,627,675 and £42,248,897 respectively. Figure 17 below shows the net expenditure on HWRC's during 2021/22 on a cost per hh basis.

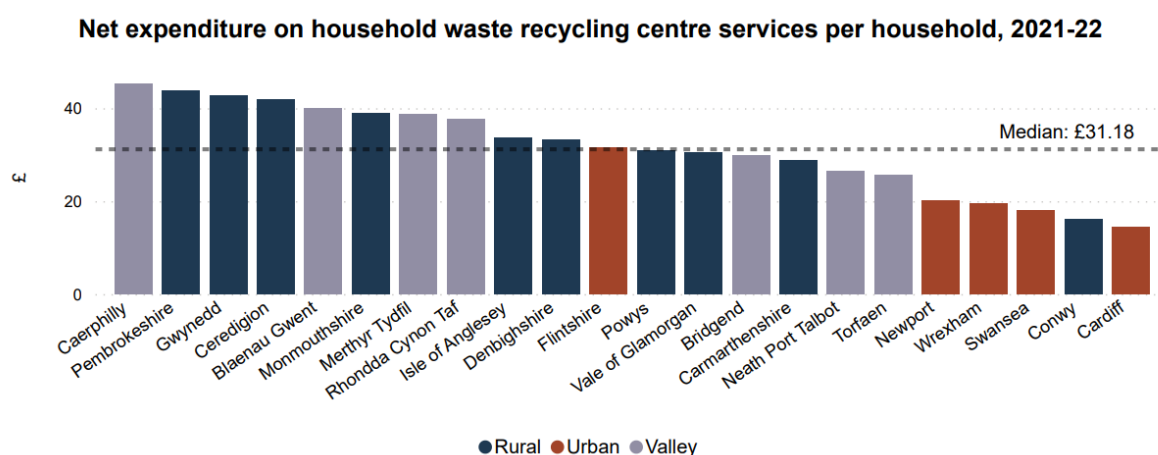


Figure 17

Between 2020/21 and 2021/22 the HWRC median cost per hh increased by £2.20, increasing to £31.20 per hh; a similar figure to that of pre pandemic levels. The median net cost per tonne decreased by £10, decreasing to £157.91 per tonne when comparing to 2020/21. However, when comparing to pre pandemic figures there is still a significant difference. 2019/20 saw a median cost per tonne figure of £120, £38 per tonne lower than post pandemic (2021/22). This is likely to be partly linked to 18% less throughput at HWRCs when comparing pre and post pandemic periods (2019/20 and 2021/22).

2021/22 saw a 16.8% increase in throughput of recycling and residual waste at HWRC's. During the same period, mass from HWRC's as a proportion of overall household waste streams increased from 21% in 2020/21 to 24% in 2021/22. However, the proportion has not returned to pre covid (2019/20) levels of 30%, demonstrating the lasting impact of the pandemic.

¹⁷ More detailed information on HWRCs and re use shops can be found in the Waste Improvement Programme HWRC benchmarking report which can be found on the [Waste and Recycling Financial benchmarking hub](#)

Following the pandemic, 2021/22 saw a shift in tonnages between kerbside (dry, organic and residual) and HWRC. As highlighted in figure 18, HWRC tonnage increased by 46,026 tonnes whereas overall kerbside tonnage decreased by 52,612t suggesting that as HWRCs reopened following the pandemic, and people returned to work, less waste was presented at the kerbside and more waste was taken to HWRCs, highlighting a part return to ‘normal’.

Since 2008/09 recycling performance has increased steadily with 2021/22 seeing a slight drop. In some councils where booking systems have been put in place, it has been seen as a deterrent in “trade” waste being disposed of at HWRC’s. It is possible that the reduction in throughput over recent years is also linked to the ongoing implementation of comprehensive kerbside services across Wales, trade waste restrictions, residency checks and the opening of re-use shops.

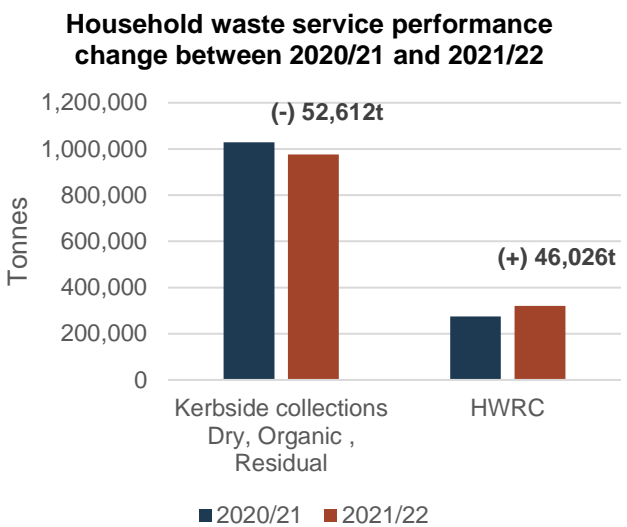


Figure 18

Appendix – Table A

Service collection detail

Council	Recycling Collection Method	Residual Frequency	Residual Receptacle	Garden Waste Frequency	Garden Waste Charge	Number of HWRCs	Number of Reuse Sites
Anglesey	Blueprint	Three Weekly	240 Litre Wheelie Bin	Fortnightly (collected all year round)	Charge	2	
Blaenau Gwent	Blueprint	Three Weekly	240 Litre Wheelie Bin	Weekly (Seasonal)	No Charge	2	
Bridgend	Blueprint	Fortnightly	65L Kerbside Blue Sack (2 bags)	Fortnightly (Seasonal)	Charge	3	1
Caerphilly	Co-mingled	Fortnightly	240 Litre Wheelie Bin	Weekly (collected all year round)	No Charge	6	1
Cardiff	Co-mingled	Fortnightly	140 Litre Wheelie Bin or Red Striped Sack (3 bags)	Fortnightly & Monthly in Winter	No Charge	2	1
Carmarthenshire	Co-mingled (Fortnightly)	Fortnightly	Households provide their own bags (4 bags)	Fortnightly (Seasonal)	Charge	4	1
Ceredigion	Twin Stream	Three Weekly	Households provide their own bags (not restricted)	Fortnightly on request	Charge (Service was mostly suspended 2021/22)	4	1
Conwy	Blueprint	Four Weekly	240 Litre Wheelie Bin	Fortnightly	Charge	2	1
Denbighshire	Co-mingled (Fortnightly)	Fortnightly	140 Litre Wheelie Bin	Fortnightly	Charge	3	
Flintshire	Blueprint	Fortnightly	180 Litre Wheelie Bin	Fortnightly	Charge	5	
Gwynedd	Blueprint	Three Weekly	240 Litre Wheelie Bin	Fortnightly	Charge	8	1
Merthyr Tydfil	Blueprint	Fortnightly	140 Litre Wheelie Bin	Fortnightly (Seasonal)	No Charge	2	1
Monmouthshire	Multi Stream	Fortnightly	Households provide their own bags (2 bags)	Weekly (Seasonal)	Charge	4	1
NPT	Blueprint	Fortnightly	140 Litre Wheelie Bin	Fortnightly	No Charge	3 (1 is a shared site with Powys Council)	1
Newport	Blueprint	Fortnightly	120 Litre Wheelie Bin	Fortnightly	No Charge	1	1

Pembrokeshire	Blueprint	Three Weekly	Residual bags supplied (3 bags)	Fortnightly (Seasonal)	Charge	6	
Powys	Blueprint	Three Weekly	180 Litre Wheelie Bin	Fortnightly (Seasonal)	Charge	5 (1 is a shared site with NPT)	
RCT	Twin Stream	Fortnightly	Mix of 120 & 240 Litre Wheelie Bins	Weekly & fortnightly in winter	No Charge	6	2
Swansea	Multi Stream (Fortnightly)	Fortnightly	Households provide their own bags (3 bags)	Fortnightly	No Charge	5	1
Torfaen	Kerbside Sort	Fortnightly	140 Litre Wheelie Bin	Fortnightly	No Charge	1	1
Vale of Glamorgan	Blueprint	Fortnightly	Households provide their own bags (2 bags)	Fortnightly (Seasonal)	No Charge	2	
Wrexham	Blueprint	Fortnightly	240 Litre Wheelie Bin	Fortnightly & monthly in winter	Charge	3	1

For further information on service detail go to the Benchmarking Hub:

<https://www.benchmarkingwales.net/IAS/launch>