

## WASTE CONTRACTORS SURVEY 2001

### EXECUTIVE SUMMARY

Enviros were commissioned by the Environment and Heritage Service in 2002 to develop and undertake a survey of the waste management industry in Northern Ireland. The aim of the survey was to investigate the types and quantities of waste handled by waste management companies in Northern Ireland in 2001 and understand the issues and opinions they currently hold.

All the identified waste contractors in Northern Ireland were sent one of two survey types:

- ◆ Simple, and
- ◆ Detailed.

This facilitated the survey of the entire industry, but allowed a thorough coverage of the industry to be targeted for more detailed information, based on their turnover, facility type and location. The remainder of companies were sent simple surveys in order to reduce the complexity of the form and the time spent on completion with the aim of improving the response rate.

Companies were identified through the waste licensing process, business and waste directories and professional knowledge, however, we do not expect that the list is exhaustive. They were assigned a main activity in order to aid the analysis, although it was noted that many companies conducted more than one waste activity. The activities identified are listed below.

The surveys were designed so that the results from the two surveys could be combined for analysis. The response is shown below:

Activity	Detailed Returns		Simple Returns		Total Returns	
	No.	%	No.	%	No.	%
Reprocessor/ Recycler	9	47	11	17	20	25
Landfill	10	53	9	16	19	25
Waste Collection	5	56	13	22	18	26
Transfer	2	40	3	23	5	28
Incineration/ Treatment	1	100	0	0	1	33
Unknown	0	0	7	58	7	50
Total	27	50	43	21	70	27

The detailed survey requested information on collection systems, the quantity of waste handled categorised by European Waste Classification (EWC) to the first level headings, and for Priority Waste Streams to the second level headings. The simple survey asked operators to quantify the annual waste handled to first level EWC.

An analysis of the returns was used to produce an industry population, based on the assumption that the profile of responses is comparable to that of the

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entire industry. The populations were used to increase the accuracy of grossing-up.

It is, however, difficult to accurately gross up the data from this survey to a Northern Ireland level as information on the entire industry is not available and therefore companies cannot be banded according to their turnover or tonnage throughput. Waste management may also only be a small part of the entire business and so employee numbers may not be an accurate indication of size.

A summary of the wastes reported as collected, treated and disposed is shown below:

	Waste Collected	Transfer	Landfill Operators	Recyclers/ Reprocessors	Incineration/ Treatment
Calculation Population	Unknown	Unknown	56	61	2
Sample Size	30	18	18	18	1
Total Waste (tonnes)	275,731	139,036	298,980	175,572	3,723
Minimum Quantity of Waste (tonnes)	0		1,000	0	
Maximum Quantity of Waste (tonnes)	42,980		64,000	49,400	
Range (tonnes)	42,980		63,000	49,400	
Mean Quantity of Waste (tonnes)	9,508		16,610	9,754	
Standard Deviation (tonnes)	9,992		23,908	14,213	
Standard Error (tonnes)	1,855		6,389	3,350	
95% Confidence Interval Range (rounded to nearest 100 tonnes)	5,900 to 13,100		4,100 to 29,100	3,200 to 16,300	

The table shows the analysis of results with any outliers showing extraordinary values removed. The total population of waste collection companies and transfer facilities is unknown as many companies operate these facilities in conjunction with their main activity. The results do not include for council operated facilities and are composed only of private operators which mainly service the commercial and industrial sector.

The data which could be grossed up to the Northern Ireland level is summarised below:

	Landfilled	Recycled/ Reprocessed
Total Estimated Waste Handled by Waste Management Companies in NI in 2001	229,600 to 1,629,600	195,200 to 994,300

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The detailed survey also requested opinions from the waste management industry on the key issues for the industry and barriers to recycling in Northern Ireland. Respondents expressed opinions with regard to the following:

- a) Public Perception. It was generally viewed that waste producers are apathetic to the idea of recycling and a change in attitude is required;
- b) Legislation. Operators felt the current legislation could be tightened through regulation and enforcement in order to improve waste recovery;
- c) Financial Issues. Operators would welcome financial assistance to develop systems for the recovery and recycling of waste and an increase in the landfill tax would discourage landfilling, and
- d) Improvements to the Existing Waste Management Structure. Operators feel that the current infrastructure is inadequate to deal with the proposed levels of reuse and recycling for Northern Ireland.
- e) Requirement for Landfill. It was commonly felt that landfills were a necessary part of the waste management solution for Northern Ireland.

The survey has identified the areas for improvement for future surveys and these areas are summarised as follows:

- a) Improvements to the survey design to further clarify returns and assist the contractors with completion;
- b) Clarification of and regular amendments to the survey list, and
- c) changes/improvements to waste management licensing.

The area identified which it was felt would most improve this survey is the introduction of waste management licensing in Northern Ireland. Waste Management Licensing Regulations are due to be introduced in Northern Ireland in 2003.