



association for public service excellence

State of the Market 2025

Local authority catering services



Briefing 25/06

May 2025

Table of Contents

Results at a glance	4
1 Local authority catering services - State of the Market 2025	5
2 Results.....	5
3 Scope of the catering service	5
3.1 What catering services do you supply?.....	5
3.2 How is the catering service organised in your council / catering organisation?.....	6
4 Workload	7
4.1 How do you expect workload to change over the next 12 months?.....	7
5 Staffing	7
5.1 All employers must now pay the National Living Wage. Do you pay the higher Living Wage Foundation Living Wage?.....	7
5.2 What is the basic current hourly rate for a catering assistant (before tax) in £.....	8
5.3 Does your service offer any of the following apprenticeships?.....	8
5.4 Are staff absence levels at an acceptable level?.....	9
5.5 Which of the following staff training applies to your authority/ organisation?	10
6 School Meals.....	11
6.1 What do pupils pay for a school meal?.....	11
6.2 What aspect of the catering service has seen the greatest price rises?.....	11
6.3 What measures has the service taken to mitigate the impact of rising food costs?.....	12
7 The catering service.....	13
7.1 Overall, how do you expect the following to change over the next year?.....	13
7.2 Which of the following do you use?.....	14
8 Selling services outside the council.....	14
8.1 Do you sell your services outside of the Local Authority?.....	14
9 Sustainability	15
9.1 What measures have you implemented to make the service more sustainable?	15
10 Comments on the future	17
10.1 Overall, how do you expect the following to change over the next year?.....	17
10.2 What do you think are the greatest challenges facing the sector?	18

11 Growth areas	19
12 Areas of future decrease.....	20
13 APSE comment	21
14 How can APSE help?.....	22
14.1 Benchmarking.....	22

State of the Market 2025

Local authority catering services

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK.

Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.

Results at a glance

(Change from 2024)

Scope of the service

Provide school meals	100% (No change)	
Catering sits within central FM service including Soft FM	39.39% 14.10%	-

Workforce

Personal workload to increase	81.25% - 2.53%	
Catering service workload to increase	65.63% 15.45%	-

School Meals

The average pupils pay for a primary school meal	£2.63 + £0.17	
The average pupils pay for a secondary school meal	£2.79 + £0.35	
Staffing costs have seen the greatest rise	90.63% +4.52%	

Future growth areas for the service over the next 12 months

Selling services to other councils / council areas	40.74% +6.36%	
Catering for early years	33.33% +2.08%	

Future decrease areas for the service over the next 12 months

Contracts with schools	43.48% + 4.19%	
Contracts with academies	60.87% +7.30%	

1 Local authority catering services - State of the Market 2025

APSE conducted an online survey in January to March 2025, which was sent out to local authority catering contacts throughout the UK.

A series of questions were asked covering attitudes to the issues currently facing catering, including the operation of the catering organisation and challenges for the future. Most of the questions have been surveyed since 2008 and trends are now apparent.

The data collected through these surveys is intended to provide a snapshot of the perception of local authority caterers. For a detailed and verifiable comparison of both financial and performance data, authorities who are not already members, should consider joining APSE performance networks, the UK's largest, and longest established, voluntary data benchmarking service for local councils.

2 Results

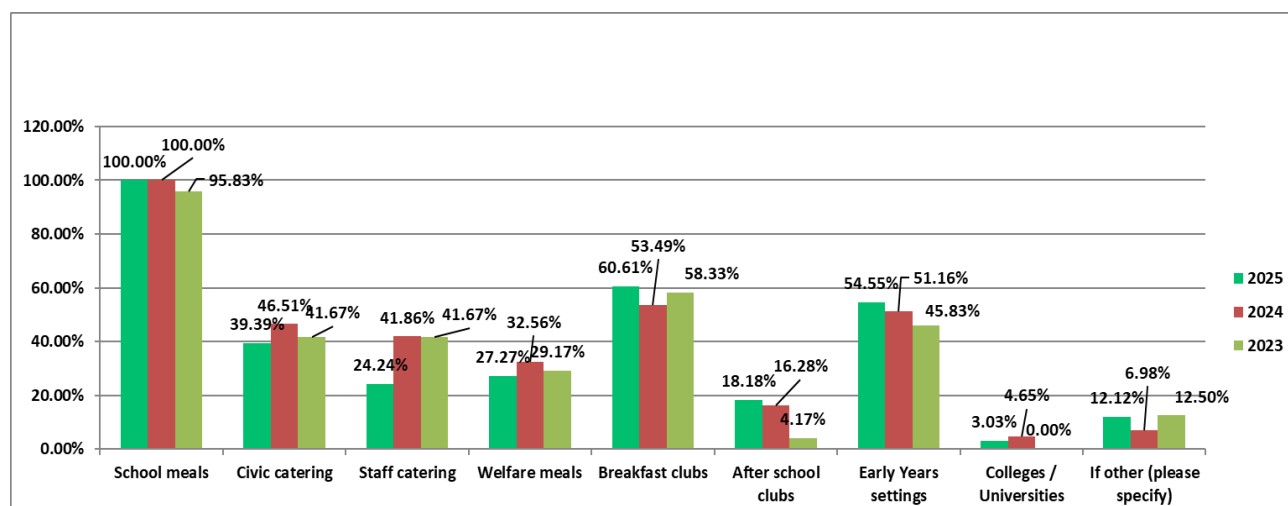
Respondents were UK wide with 52.50% of respondents from England, 32.50% from Scotland and 15% from Wales. The survey, therefore, reflects APSE's UK-wide membership and provides a broad reflection of opinion.

3 Scope of the catering service

3.1 What catering services do you supply?

The graph below outlines the services supplied by local authority caterers for 2025.

The responses to the 2025 survey show that the scope of the catering service remains consistent with the last two surveys and it is clear that school catering remains the dominant service with 100% of respondents advising that they provide this service.



The data shows that the number of respondents reporting that they provide civic catering has seen a decrease from 46.51% in 2024 to 39.39%, this could be due to the costs associated with catering for civic events making the service not viable. Especially the additional costs associated with staffing such events.

The number of respondents reporting that they do staff catering is at the lowest in three years and has dropped to 24.24%. This again could be attributed to the costs of providing the service coupled with the changes in work patterns reducing demand for the service.

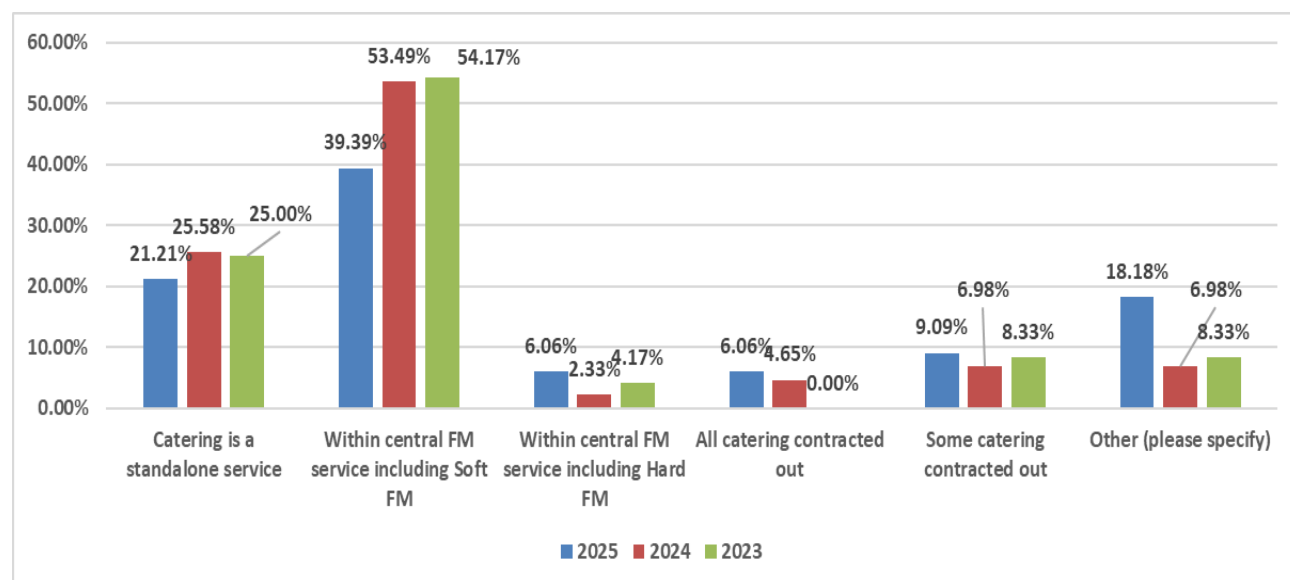
There has been a slight increase to 18.18% of respondents that report that they provide catering for afterschool clubs and just under a 10% increase to 54.55% reporting that catering was provided to early years settings. This could be due to an increase in the number of hours that families are eligible for free childcare places.

Respondents also commented that they provided other types of catering services including: -

- Care homes
- Holiday provision
- Public and community cafes

3.2 How is the catering service organised in your council / catering organisation?

The survey sought to gain information regarding how the catering service was organised within the council. The graph below outlines the responses received and provides a comparison with the last two surveys conducted.



The responses to the survey for the last three years show that there has been a decrease in both catering as a standalone service and the catering service sitting as part of a soft FM service.

There has however, been an increase in the number of respondents reporting 'other', from 6.98% in 2024 to 18.18% in 2025 when asked about their catering arrangements. When looking at the comments, respondents reported that the service sits in the education and children's services.

The decrease in catering as a standalone service could be a response to the severe budget pressures local authorities are experiencing and the increase in the cost of providing the service requiring councils to combine catering with other services to assist in keeping it viable.

4 Workload

4.1 How do you expect workload to change over the next 12 months?

The survey asked how workload was expected to change over the next 12 months both personally and for the wider catering service.

The majority of respondents (81.25%) expected that their personal workload would increase, 12.50% thought it would stay the same and 6.25% of the respondents believed their personal workload would decrease. When referring to the catering section, 65.63% of respondents expected that the workload would increase, 21.88% thought it would remain the same over the next year and 12.50% believed it would decrease. The percentage of respondents believing that the workload of the catering section and personally would increase remains high, this could be attributed to the range of services the service provides, the impact of retention and recruitment issues and reduced budgets.

There has been a decrease from 81.08% of respondents in 2024 to 65.63% of respondents in 2025 reporting that the workload in the catering section would increase. This could be due to the fact the roll out of Universal Primary Free School Meals in Wales and the increase of free school meals to up to Primary seven in Scotland have now been implemented.

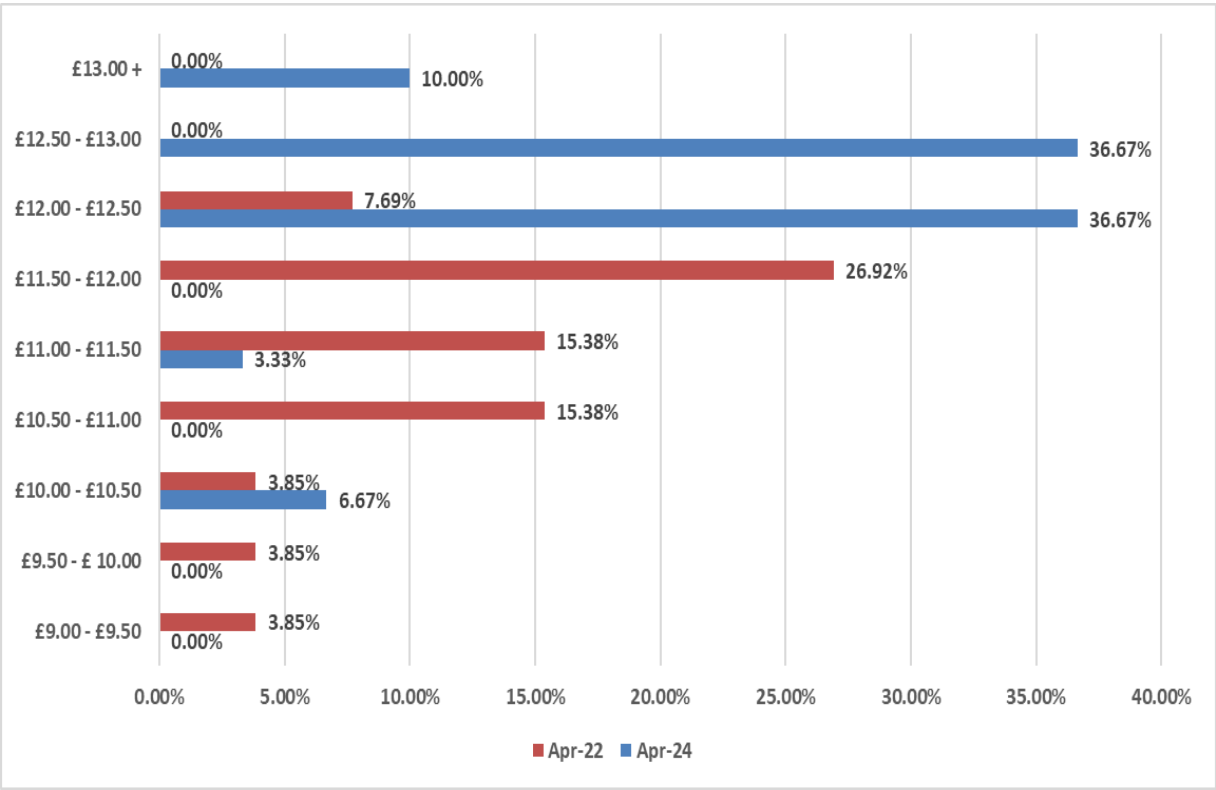
5 Staffing

5.1 All employers must now pay the National Living Wage. Do you pay the higher Living Wage Foundation Living Wage?

The vast majority of respondents, 74.19%, report that they pay the higher Living Wage with only 25.81% reporting that the higher foundation living wage is not paid.

5.2 What is the basic current hourly rate for a catering assistant (before tax) in £

The graph below provides an overview of the hourly rates for a catering assistant:



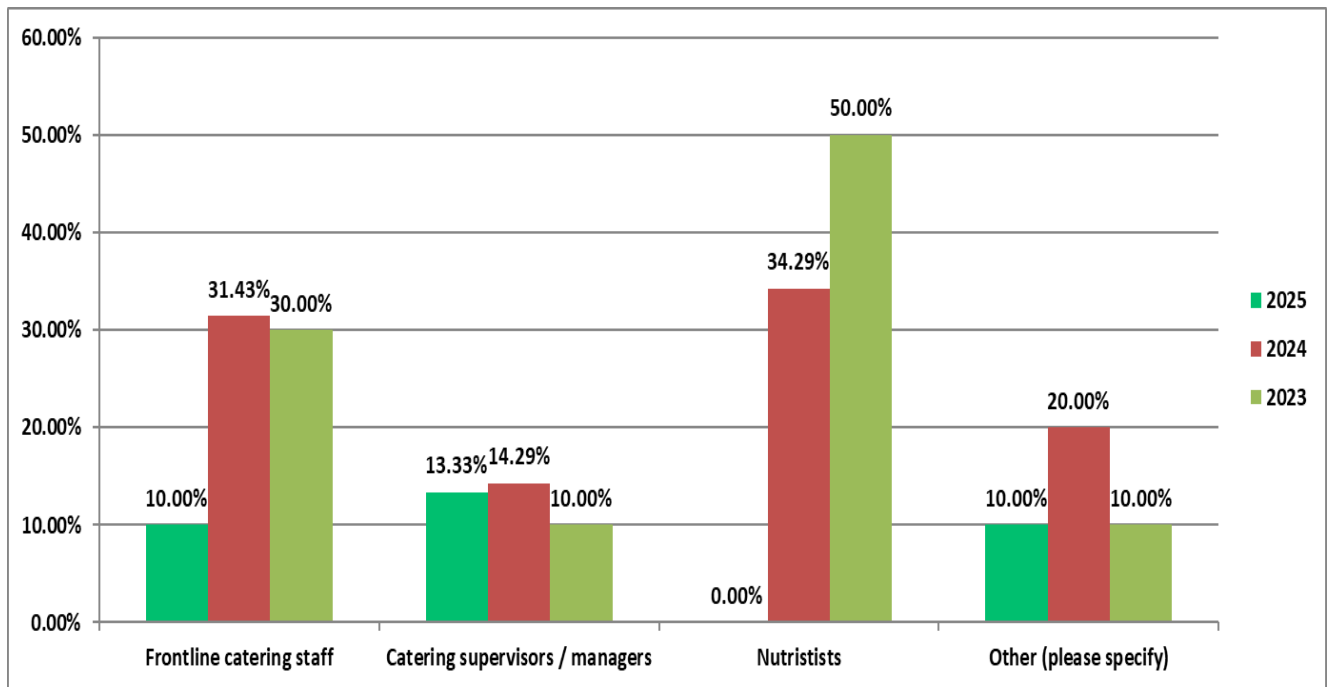
The most common rate reported in 2022 was £11.50 to £12.00 per hour with 26.92% of respondents reporting this to be the case. Whereas for 2024 the most commonly hourly rates reported are £12.00-£12.50 and £12.50-£13.00.

The graph clearly demonstrated the impact that the recent NJC pay agreement which specifically weighted pay towards lower graded posts agreed in November 2023 has had on the hourly rates of catering assistants. This has continued in the 2024 settlement and whilst fair wages are to be applauded, in a service reliant upon essentially a trading arrangement with schools, the above graph it is demonstrable of the upward trends in labour costs.

5.3 Does your service offer any of the following apprenticeships?

With the introduction of the Apprentice Levy and the important role that apprenticeships play in future proofing the workforce, from 2018, new questions focusing on apprenticeship programmes were added to the APSE State of the Market survey.

The graph below highlights the areas of the service where apprenticeships are in place from the responses in 2025, 2024 and 2023.

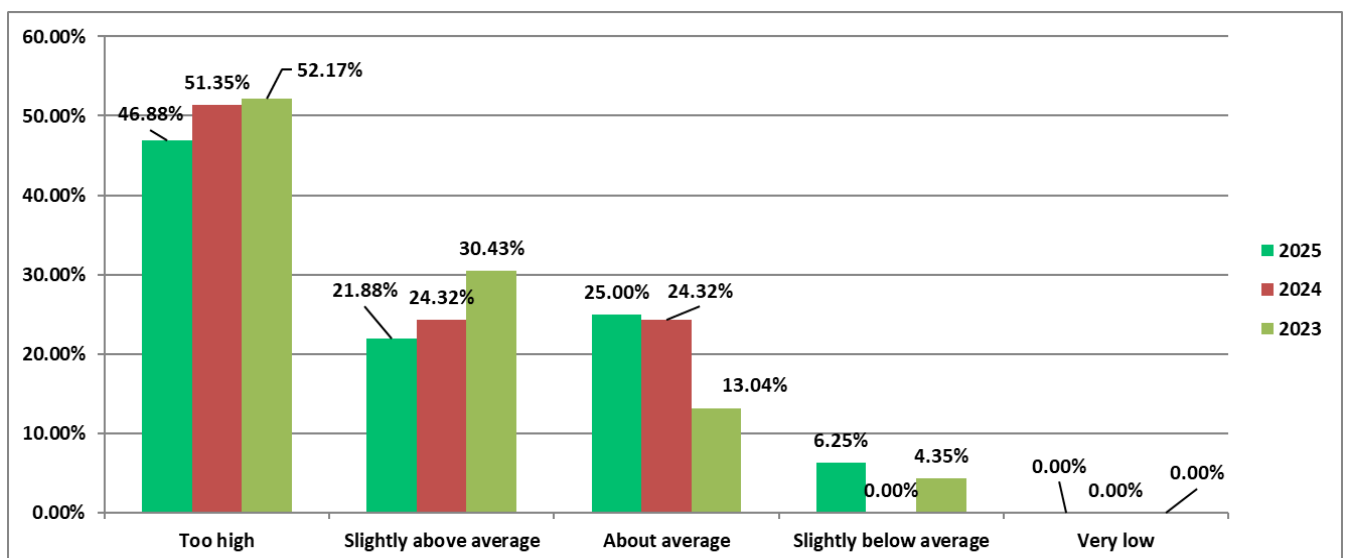


It is clear from the responses that there has been a decline in the number of councils reporting they offered apprenticeships in all areas. For those councils advising that they do not offer apprenticeships the reasons provided included staff only being on 30 weeks per year contracts and the part-time nature of the work.

5.4 Are staff absence levels at an acceptable level?

The State of the Market survey sought to establish what the perception of the respondents was in relation to the level of staff absence and how this perception compared with previous years.

The graph below outlines the views of the respondents for 2025, 2024 and 2023:



The vast majority of respondents in 2025, (68.76%) perceived that staff absence was slightly above average or too high which has decreased since 2024 where 75.67% of respondents report this to be the case. No respondents stated that they thought the absence was very low and 6.25% advise that it is slightly below average.

The State of the Market survey asks for the perception, however the APSE Performance Networks data reports on actuals and for 2023/24 the UK average for frontline staff absence was 5.59% compared with 6.07% the previous year and 5.64% in 2021/22. Therefore, the perceptions on staff absence correspond with the data in that staff absence is reducing.

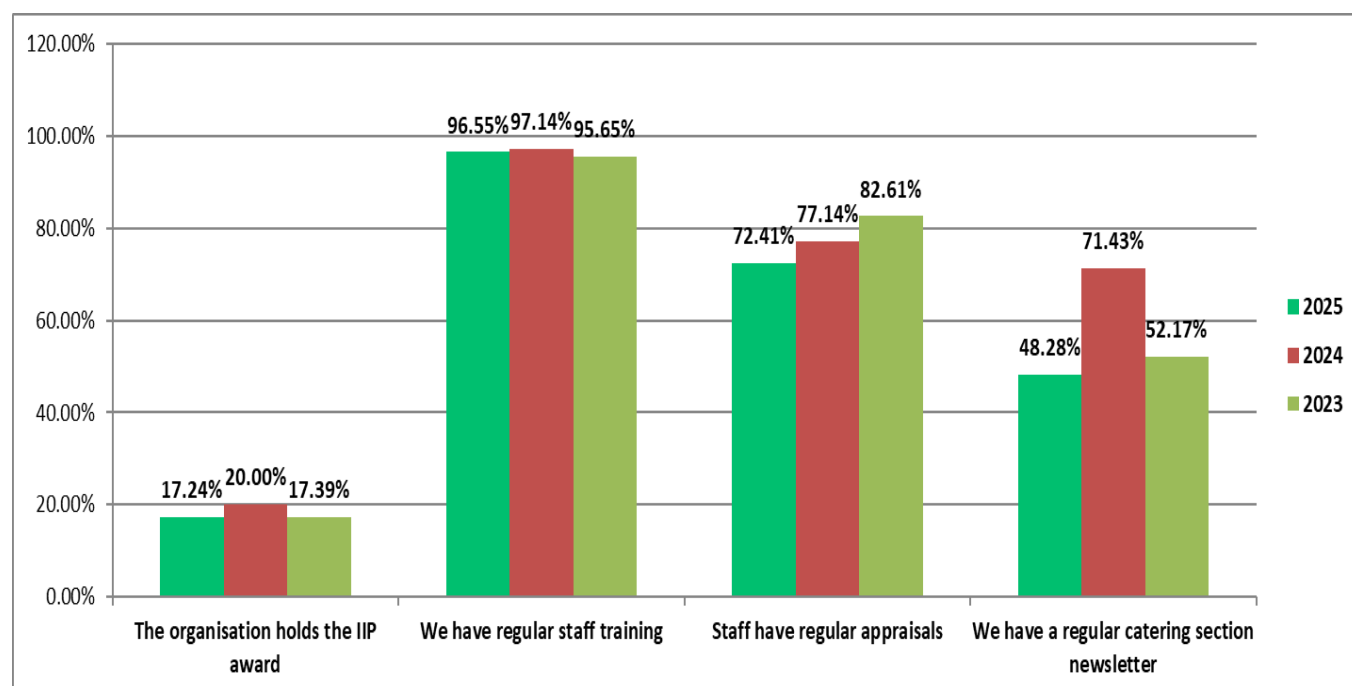
The perception of over half of the respondents to the survey state that staff absence is too high indicates that there are other factors that are in play influencing the perception such as the issues with recruitment and retention.

Although not asked in the survey, but reported by councils at the APSE Catering Network there has been an increase in the number of staff being off work for stress, mental well-being-related conditions and individuals unable to work due to being on waiting lists for NHS treatment.

5.5 Which of the following staff training applies to your authority/ organisation?

Evidence shows that a well-trained workforce not only is a positive representative of the service but providing training is an investment in the future and quality of provision.

The graph below highlights the staff training that applies to respondents:



The responses for the last three years are consistent and demonstrate that local authorities invest in their staff through the training that they provide.

Regular staff training has remained above 95% for the last three years, and over 70% of respondents have reported that they hold regular staff appraisals.

Investment in the workforce in the form of training not only ensures that staff are kept up to date with the latest food-related legislation such as allergen awareness, but it also assists with the motivation of the workforce.

6 School Meals

6.1 What do pupils pay for a school meal?

The survey asked respondents to provide details of the price pupils pay for a school meal in primary and secondary schools. The table below provides an overview of the highest, lowest and average price paid by pupils for a school meal.

	Primary			Secondary		
Year	Lowest	Highest	Average	Lowest	Highest	Average
2023	£1.90	£2.85	£2.40	£2.00	£2.70	£2.29
2024	£1.90	£3.10	£2.46	£1.80	£3.15	£2.44
2025	£1.90	£3.20	£2.63	£2.10	£3.50	£2.79

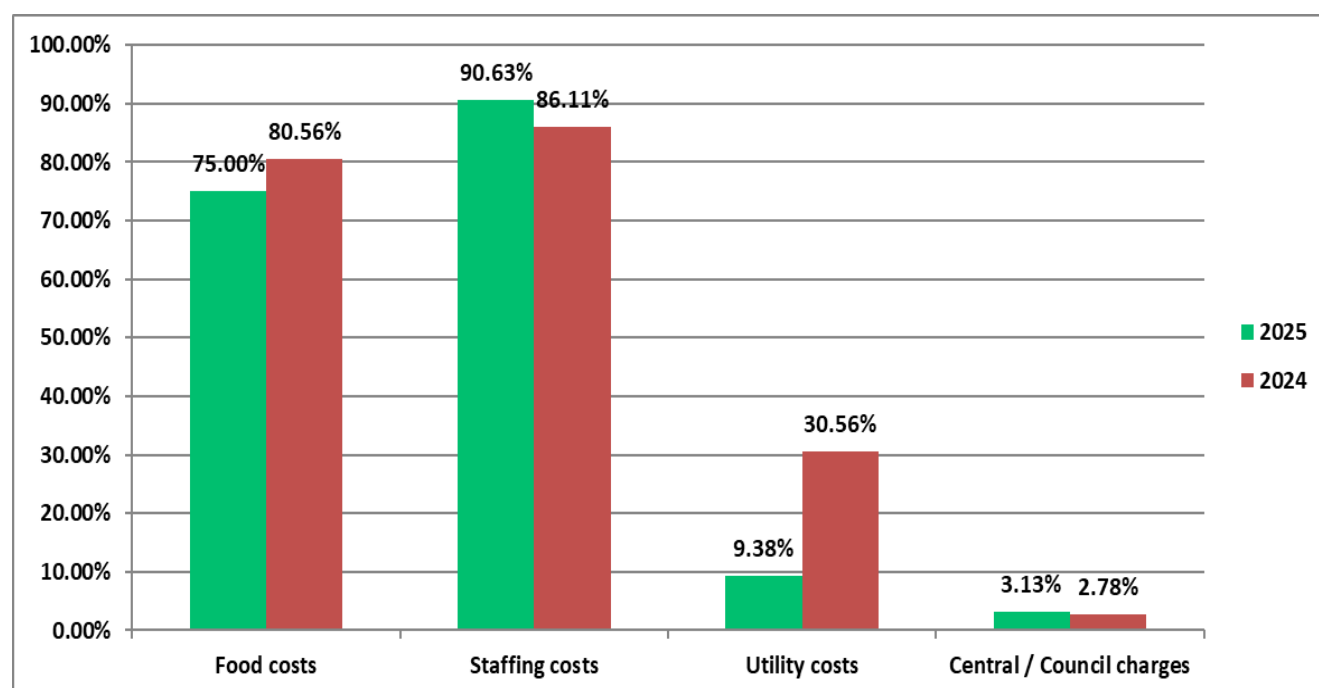
The average price paid for a primary school meal has seen an increase from £2.40 in 2023 to £2.63 in 2025. The average price paid for a secondary school meal has also seen an increase from £2.29 in 2023 to £2.79 in 2025.

Catering managers report at the APSE Catering Network, that they are reluctant to increase the price the pupil pays for a school meal due to the impact on the family's budget. However, it is clear from the responses to the survey that due to the rising costs of providing the provision and with councils unable to subsidise the service due to budget pressures, there has had to be an increase in prices to ensure viability.

6.2 What aspect of the catering service has seen the greatest price rises?

This question was first asked during the cost-of-living crisis and going forward it will allow the areas of price increases to be tracked. Therefore, the survey sought to ascertain where the greatest price rises were in the service.

The graph below provides an overview of the responses received:



It is evident from the responses that the two aspects of the service that have seen the greatest impact from the price rises are food and staff cost. However, there has been a 5% decrease in respondents reporting food costs which is consistent with the rate of price inflation. On the other hand, there has been an increase in respondents to over 90% reporting that staff costs had seen the greatest increase, this is evidenced by the answers outlined in section 5.2 of this survey.

6.3 What measures has the service taken to mitigate the impact of rising food costs?

To gain an understanding of what measures councils are undertaking to mitigate the impact of price rises the survey asked respondents to indicate what they are doing to mitigate the rises.

The table below provides a comparison of the measures that respondents have reportedly taken in 2025, 2024 and 2023 surveys.

	2025	2024	2023
Worked with suppliers	83.87%	82.86%	95.45%
Increased the use of seasonal produce	54.84%	57.14%	45.45%
Introduced meat free days	64.52%	42.86%	22.73%
Reduced the options available	38.71%	22.86%	22.73%
Decreased portion sizes	19.35%	8.56%	18.78%
Other (please specify)	0.00%	20.00%	9.09%

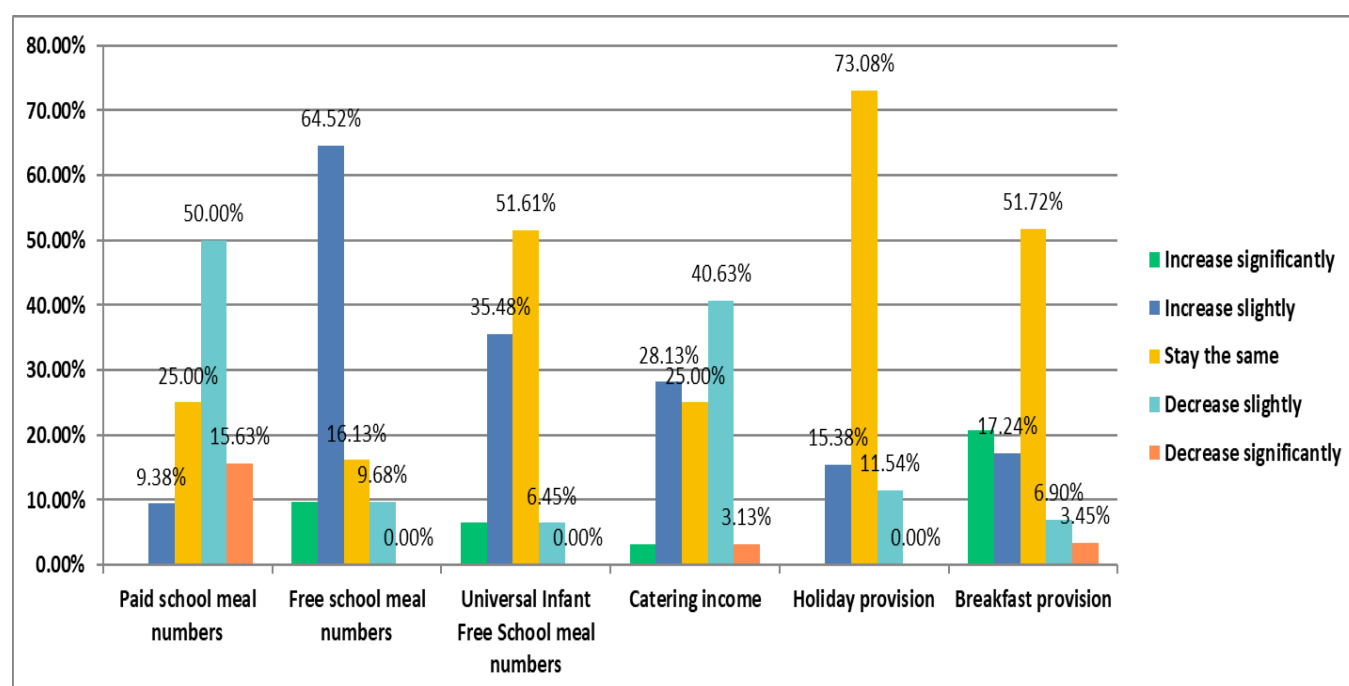
The responses to the 2025 survey when compared to the previous years show that the introduction of meat free days has increased from 22.73% in 2023 to 64.52% in 2025. This measure is a cost reduction measure, but could also be in response to the catering services commitment to being more sustainable and the changes to UK diets, with a survey carried out by the Vegan Society that reported January 2025 that over 3% of the UK population self-identified as vegetarian or vegan and 10% of the UK population are eliminating or otherwise reducing animal product consumption.

7 The catering service

7.1 Overall, how do you expect the following to change over the next year?

The survey sought to gain an understanding of the expectations for catering service over the next 12 months.

The graph below highlights the responses received:



The survey highlighted that 50% of respondents predicted that paid school meal numbers would reduce and the majority of respondents 64.52% anticipated that free school meal numbers would increase slightly. 40.63% thought catering income would decrease slightly.

If these expectations come to bear, then there will be a further pressure placed on the catering service, as the gap between the funding for free school meals and the cost of delivering the meal has increased, coupled with a slight decrease in the paid school meal numbers which will place a further viability burden on the service.

7.2 Which of the following do you use?

Many councils use a catering software package to comply with nutritional requirements and to meet the requirements of Natasha's Law. Several systems exist to assist with productivity, reducing queuing, waste management, and the requirement to handle cash.

The table below outlines the percentage of respondents that report the systems that are utilised in at least one school for both primary and secondary schools.

	Primary		Secondary	
	2025	2024	2025	2024
Paper based Pre-ordering	80.00%	34.88%	33.33%	6.98%
Electronic Pre-ordering	100.00%	81.40%	25.93%	46.51%
On-line payment for parents	96.55%	79.07%	65.52%	76.74%
Biometric recognition	12.50%	9.30%	93.75%	48.84%
Pre-paid cards	33.33%	6.98%	83.33%	34.88%
School kitchen management software	95.24%	58.14%	61.90%	44.19%

For primary schools, 100% of councils are reporting that they are now using electronic pre-ordering, 96.55% report that they are utilising on-line payments systems for parents and 95.24% are using school kitchen management software. Which are all increases when compared with 2024.

In secondary schools, 93.75% of respondents report that they are using biometric recognition, 83.33% have pre-paid cards in place and 65.52% have on-line payments for parents.

The state of the market surveys highlights that the transition to online has accelerated. There could be many reasons for this acceleration, including the pandemic. During this time there are examples of school catering services developing mobile apps as a way of communicating with parents. There is also a need to have real-time data to control costs, the need to become more sustainable and reduce food waste.

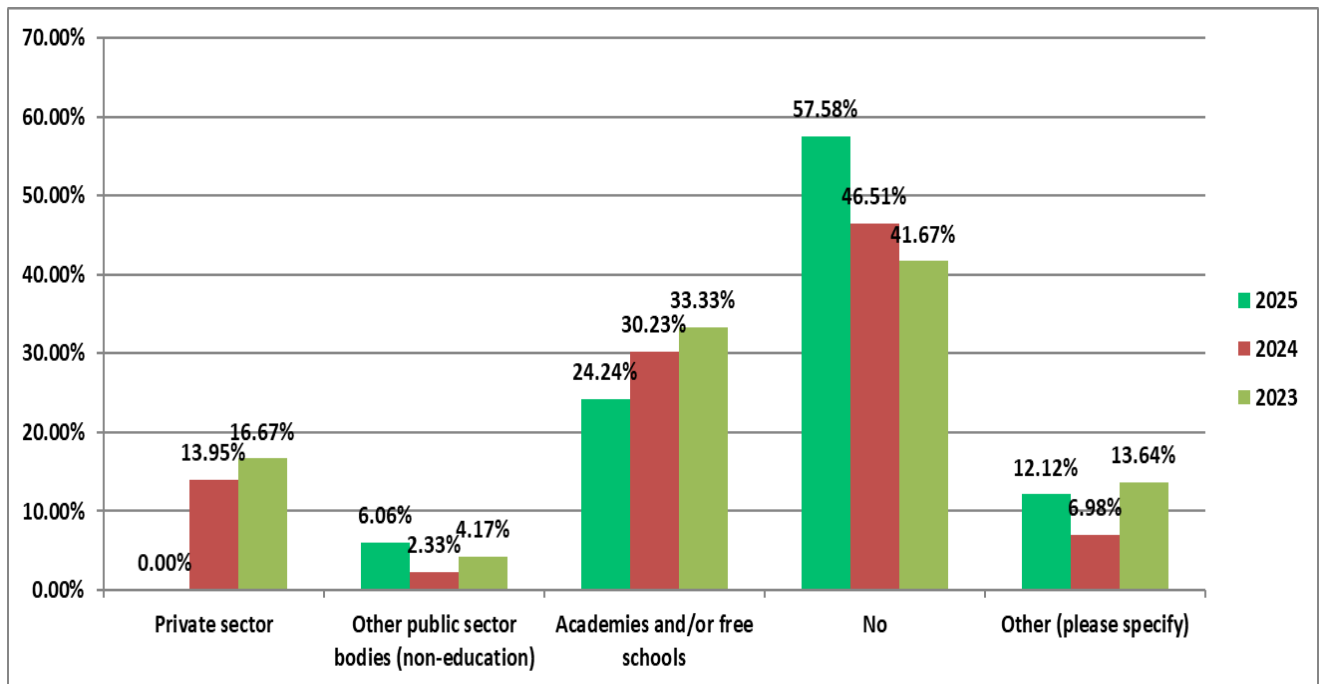
The data shows that there has been an increase in the number of councils using paper-based pre-ordering systems in both primary and secondary schools, the reason for the reported increase is not clear and further investigation is required to establish the reasoning behind the increase.

8 Selling services outside the council

8.1 Do you sell your services outside of the Local Authority?

As councils seek opportunities to commercialise and safeguard the service budget, APSE was keen to establish where local authorities were selling their services.

The graph below highlights the results from the 2025 survey and provides a comparison with the responses from 2024 and 2023:



There is a clear trend emerging from the last three years of responses to the survey in that there has been a decline in all areas where local authorities sell their services. However, when discussing the reasons for this with local authorities at the APSE Catering Network, the main reason cited for the decline in commercial work centers around the challenges in recruiting and retaining staff, and the increased cost of providing the service.

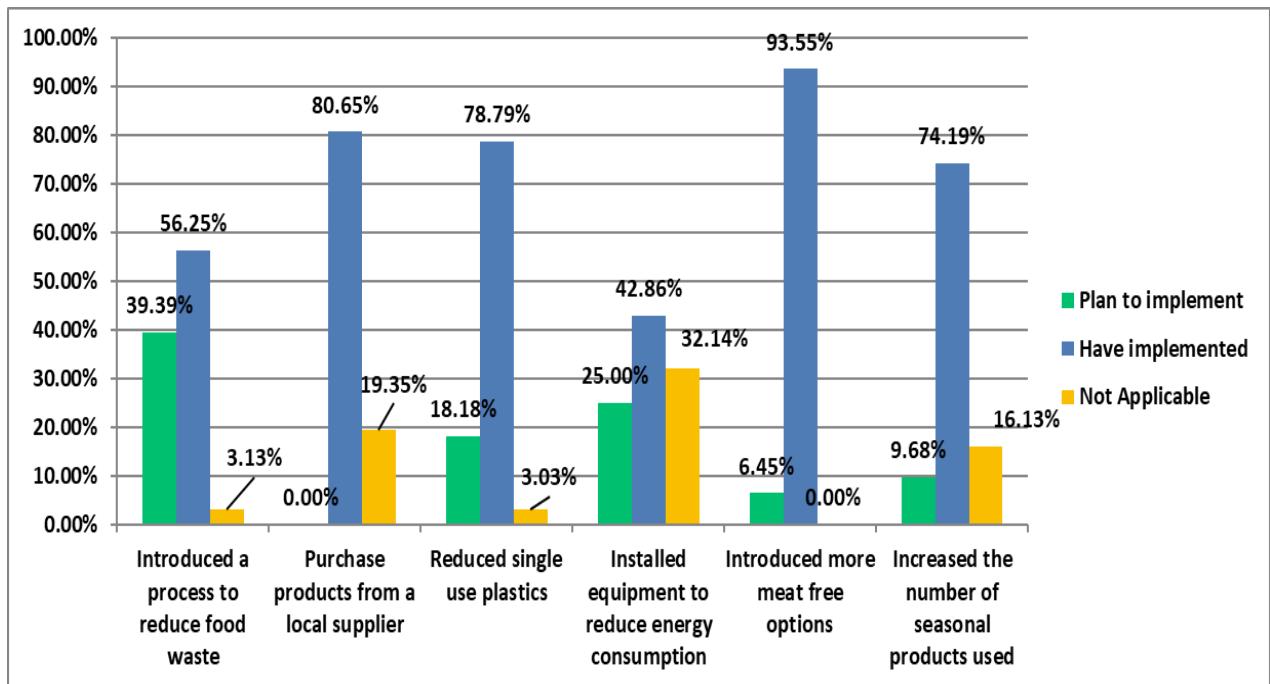
Although there has been a further increase in the number of respondents reporting that they do not sell services outside the local authority to 57.58% in 2025 from 41.67% in 2023, in the comments associated with this question, respondents report selling their services to schools in other local authority areas.

9 Sustainability

9.1 What measures have you implemented to make the service more sustainable?

Many local authorities have declared a climate emergency, and frontline services are required to implement measures to allow the council to achieve net zero targets. Therefore, last year an additional question was added to the State of the Market survey to gain a snapshot of what measures the catering service has implemented or is planning to implement to make the service sustainable. This question was repeated in 2025.

The graph below outlines the measures that respondents have reported that they plan to implement or have implemented:



The greatest number of respondents, 93.55%, report that they have introduced more meat free days which compares with 86.05% who reported this to be the case in 2024. 80.65% purchase products from local suppliers, which represents an increase of 3.91% in the number of respondents reporting this in 2024.

The introduction of measures to make the service more sustainable can not only be good measures to implement to assist in achieving net zero targets but can also support the financial sustainability of the catering service. Therefore, when reviewing working practices and implementing new measures, a clear strategy can ensure that any opportunities to improve the future 'green' and financial sustainability of the service are adopted.

10 Comments on the future

10.1 Overall, how do you expect the following to change over the next year?

The 2025 survey sought to gain an understanding of the expectations that respondents have for the next year.

The table below outlines the responses received.

	Increase significantly		Increase slightly		Stay the same		Decrease slightly		Decrease significantly	
	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024
Paid meal numbers	0.00%	2.70%	9.38%	21.62%	25.00%	18.92%	50.00%	48.65%	15.63%	8.11%
Free meal numbers	9.68%	8.11%	64.52%	70.27%	16.13%	18.92%	9.68%	2.70%	0.00%	0.00%
UIFSM numbers	6.45%	8.11%	35.48%	45.95%	51.61%	37.84%	6.45%	8.11%	0.00%	0.00%
Catering income	3.13%	2.70%	28.13%	56.76%	25.00%	21.62%	40.63%	16.22%	3.13%	2.70%
Holiday provision	0.00%	8.11%	15.38%	13.51%	73.08%	56.76%	11.54%	18.92%	0.00%	0.00%
Breakfast provision	20.69%	10.81%	17.24%	5.41%	51.72%	75.68%	6.90%	2.70%	3.45%	0.00%

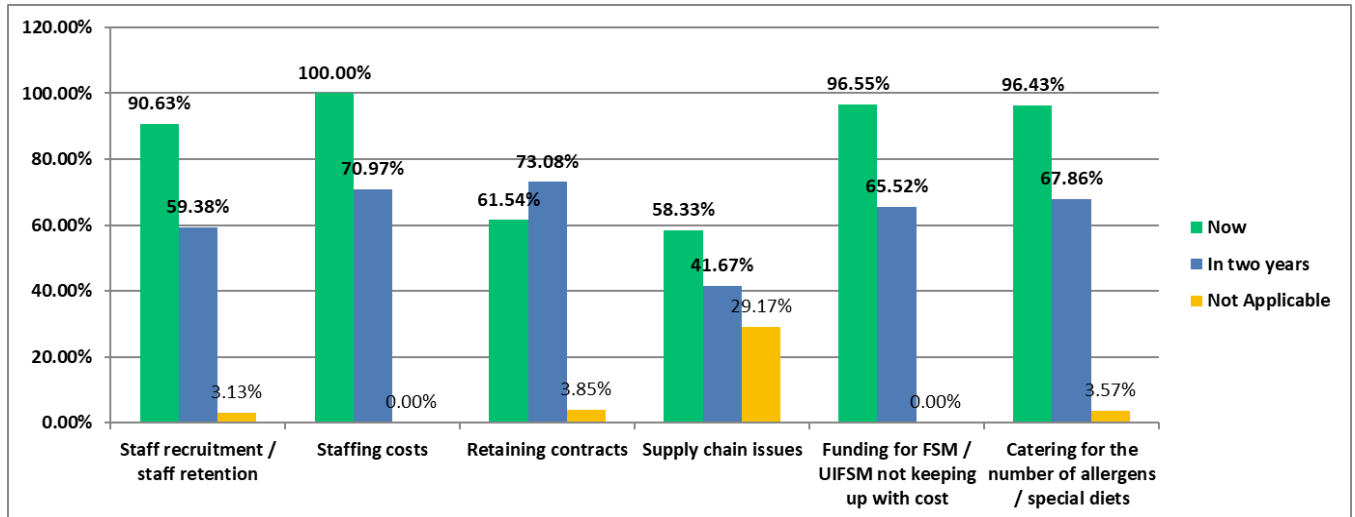
In 2024, 24.32% of respondents believed that paid meal numbers will increase significantly or increase slightly, compared with 9.38% in 2025. This could be attributed to the increase in the cost of living increasingly placing a squeeze on the family budget as well as the number of children eligible for a free school meal increasing, with the changes in government policy. For example, the rollout of free school meals under the Mayor of London's policy.

The number of respondents expecting free school meals to increase significantly or increase slightly with 74.20% expecting this in 2025 and 78.38% expecting this to be the case in 2024.

When looking at catering income, it is clear that respondents believe that they expected catering income to decrease slightly or decrease significantly with 43.76% advising this in 2025, this compares with 18.92% expecting this to be the case in 2025. This could be due to the increased pressures being placed on budgets from inflationary cost of food and increased staff cost, with the funding for school meals not increasing at the same pace and the reduction in the number of paid meals in 2024, the inflationary pressures have eased slightly changing expectation.

10.2 What do you think are the greatest challenges facing the sector?

The graph below highlights what respondents believe to be the greatest challenges currently facing the sector and what the challenges will be in two years' time.



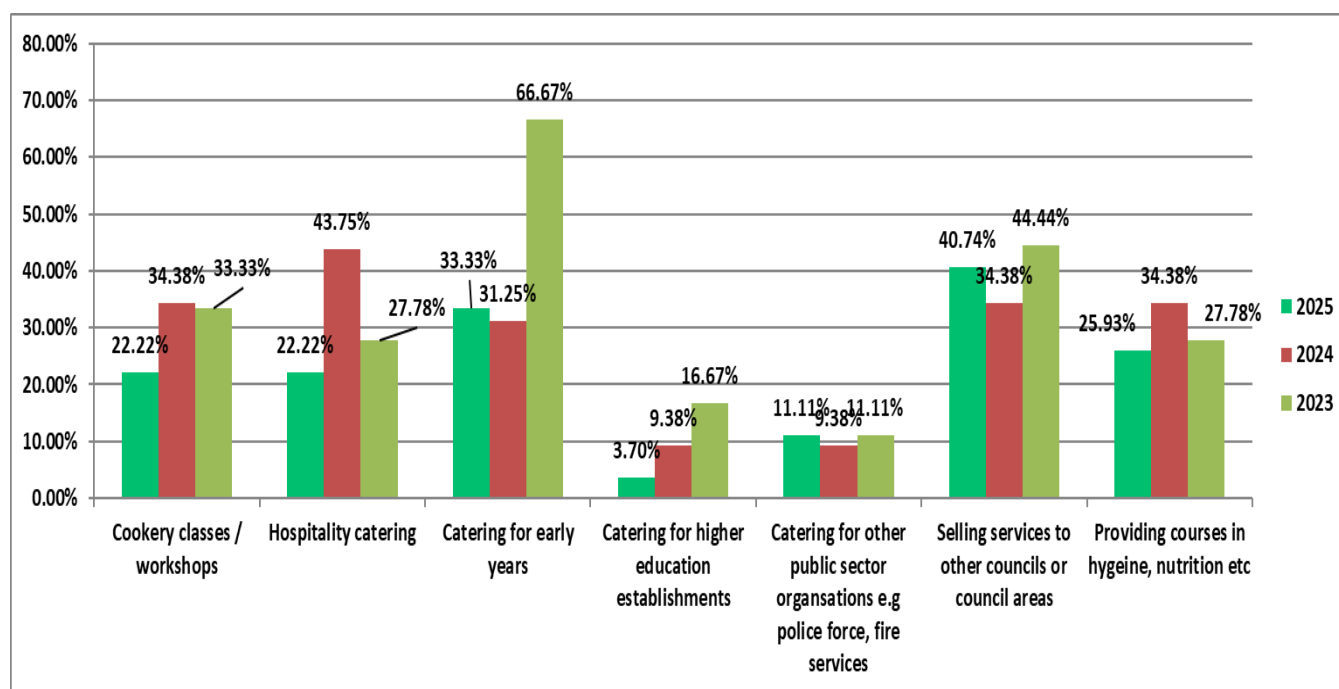
All of respondents' report that staff costs are the greatest challenge which compares with 85.71% in 2024, closely followed by funding not keeping pace with cost at 96.55% and 96.43% reporting that catering for the number of allergens and special diets was a challenge. The findings from the survey are consistent with the discussions that have taken place on the APSE Catering Network over the past few months.

These two concerns are understandable as these are sitting outside of the control of services managers and as such make it difficult for service managers to mitigate the risk and are resulting in the council reviewing their service and, in some cases, leading to the decision to be made to cease providing the service altogether. The APSE catering network has also supported its member councils with the growth in demand for allergen safe menus and special diets.

11 Growth areas

Clearly, there will be some variation in answers between the authorities responding to this question.

The graph below highlights the areas where respondents anticipated growth in 2025, 2024 and 2023:



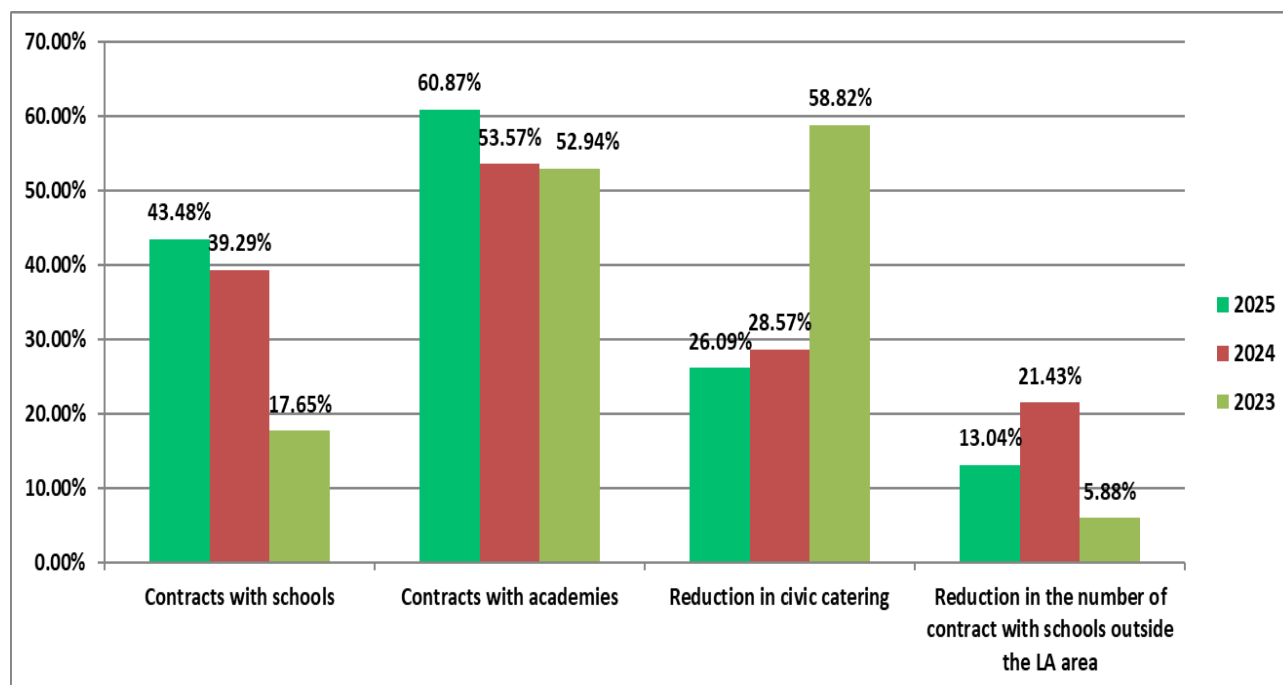
The number of respondents reporting that hospitality catering is seen as an area of growth has dropped to a three-year low of 22.22% from the high last year of 43.75%, this could be attributed to the catering service being reluctant to take on these contracts due to the challenges with staffing costs.

Selling services to other councils or in other council areas has seen an increase to 40.74% when compared with last year, this could be a reflection that the councils who are still providing the service are looking to fill the gap when other authorities decide to cease the service.

It should be noted that in the comments to this question, respondents advised that due to the lack of money to invest in the service due to the financial pressures, it was not possible to grow the service.

12 Areas of future decrease

The graph below provides an overview of where respondents anticipate that there would be a decrease in work for the service. This is summarised in the graph below:



It is clear from the responses received that there was an expectation that the catering service will see a decrease for 2025 with 43.48% expecting a reduction in contracts with schools, and 60.87% anticipating that there would be a reduction in contracts with academies. This is not a surprise as these are common themes throughout the survey.

There has been a decline in the number of respondents believing that there would be a reduction in civic catering from 58.82% in 2023 to 26.09% in 2025. This could be due to the number of councils that have ceased providing the provision over this period therefore the number who provide this catering has reduced. This is evidence in the responses to the question in the survey regarding the scope of the survey, outlined in section 3.1 of this report.

13 APSE comment

The value of school meals, particularly during the cost-of-living crisis, has been recognised as a means by which to support children and families. Catering services were also able to flex their service to support vulnerable people in the community, as well as recipients of free school meals.

However, the service, in terms of its education catering side, still operates in the vast majority of cases within a market-model and fragmentation as a result of academies, and price-based competition for the service which tends to undermine the health and wellbeing aspects of catering, as a valued part of the armoury of joined-up local public services. Whilst there are some potential opportunities, the service remains restricted by the current model of education provision within England.

It is notable that the considerable divergence in policy within Scotland and Wales reflects greater synergy between the schools' meals service, health and wellbeing outcomes for children and young people, and the role that the school meal can play in the cost-of-living crisis and sustainability objectives.

Currently, there is a perfect storm impacting local authority catering service, due to the gap between government funding for free school meals and the cost of providing the school meal increasing, councils across the UK are reporting that it is very challenging to deliver the service and remain viable. This is resulting in several authorities in England reviewing the service and in some cases opting to cease providing the service.

In some areas this is leaving the delivery of a school meals service to private sector caterers, which has several impacts including on the less profitable schools not having the option of provision, for example small schools. In addition, local authorities can use school meals to be part of the solution to issues should as the cost of living, obesity and providing the predominantly female part time workforce with good pay and conditions. With local authority providers exiting the market, these benefits cannot be realised.

Research conducted by APSE, '[Local authority education service: More than just a service](#)' explores the challenges of delivering the service, outlines the benefits of councils providing school meals and also sets out five recommendations for national governments regarding fixing school meal provision.

On a final point, APSE has consistently advanced the case for a return to greater local authority involvement in education provision and an end to the marketisation of education catering, reflecting the need for all local authority services to support children and young people providing holistic support within local communities. APSE will continue to press for public policy changes in this regard and to support the All-Party Parliamentary Group on School Food to campaign for greater awareness and recognition of the value of school food to children and young people.

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14 How can APSE help?

All APSE members can sign up to APSE's Catering Network, which is an online network providing four learning events across the year, with expert speakers from across local government and the wider parks and greenspace sector. You can sign up to the network using [this link](#).

14.1 Benchmarking

APSE Performance Networks is the largest voluntary public sector benchmarking organisation in the UK. With over 200 authorities in membership, Performance Networks assists local councils by:

- Demonstrating progression on carbon reduction/ecological actions
- Helping to set a clear baseline on which competitiveness, efficiency and value for money can be measured in a systematic manner.
- Identifying the impact of service changes and interventions for your own local authorities and for others.
- Assessing the quality, cost and competitiveness of the services that councils provide on a regular basis.
- Helping to report data in meaningful ways to both elected members and the public.
- Identifying direction of travel and pace of change with regard to service delivery.
- Identifying inefficiencies such as poor productivity and high cost.
- Supporting service improvement through process benchmarking and sharing best practice examples.

For more information about how your parks service can benefit from Performance Networks membership, click [here](#).

Sign up for APSE membership to enjoy a whole range of benefits

APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular network meetings, 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 networks are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Networks 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 Network meetings and would like to be added to our list of contacts for your service area, please email enquiries@apse.org.uk.

Our national networks include: -

- FM and Building cleaning
- Catering (School Meals)
- Cemeteries and Crematoria
- Highways and Street Lighting
- Housing, Construction and Building Maintenance
- Social Value, Procurement and Commercialisation Network
- Local Government Reorganisation Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Roads, highways and street lighting
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing

Visit www.apse.org.uk for more details.



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