



Supplementary Report: Waste Reclaimer and Buy-Back Centre Surveys

Researching a Deposit Return System for South Africa

Prepared October 2024



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Table of Contents

1.0 Introduction	4
2.0 Methodology	4
3.0 Waste Reclaimers	5
3.1 Survey of Waste Reclaimers: Overview	6
3.2 Detailed Survey Results	6
3.2.1 Personal Background of Respondents.....	6
3.2.2 Experience of Waste Reclamation as a Job	11
3.2.3 Particulars of Work: Where, What, When.....	17
3.2.4 Sorting and Storing Materials Before Selling.....	19
3.2.5 Safety at Work.....	26
3.2.6 General	29
4.0 Buy Back Centres	31
4.1 Survey of Buy-Back Centres	31
4.2 Detailed Survey Results	31
4.2.1 Sources of Recyclable Materials	31
4.2.2 Pricing of Recyclables and Income Patterns	33
4.2.3 The Impact of a DRS	40
5.0 Waste Reclaimer Design Workshops	46
6.0 Conclusion	48

1.0 Introduction

This Supplementary Report on Waste Reclaimer and Buy-Back Centre Surveys supports and should be read alongside the main report “Researching a Deposit Return System for South Africa: Costs and Benefits of Implementing a Mandatory Deposit Return System for Beverage Packaging”. However, it can also be read as a standalone report, providing readers survey findings from waste reclaimers and buy-back centres (BBCs) in South Africa regarding their activities, challenges, and income. This report explains how the surveys were conducted and presents the findings. The survey findings have been used to support the design and modelling of the Deposit Return System (DRS) scenarios presented in the main report.

The management of waste is a pressing issue in South Africa, particularly in urban areas where waste reclaimers and BBCs play a crucial role. This report explores the intersection of waste reclaimers, BBCs, and the potential implementation of a DRS in South Africa. Surveys were carried out by the University of the Western Cape (UWC) between 10 October and 20 November 2023, surveying waste reclaimers and BBCs. The surveys were carried out in 25 different towns and cities, covering all nine South African provinces. A total of 1,259 waste reclaimer surveys and 31 BBC surveys were completed.

By examining the current practices and challenges faced by waste reclaimers and buy-back centres, this research aims to assess the viability and impact of introducing a DRS. While such a system could enhance recycling rates and alleviate the problem of waste, the livelihoods of those currently involved in waste collection must be taken into account.

2.0 Methodology

Primary data collection was carried out by UWC, focusing on waste reclaimers and BBCs. A cross-sectional study design was utilised. Such a design forms part of observational research where data is collected from a sample at a single point in time. It provides a snapshot of the characteristics, behaviours, or outcomes at that specific moment, in this case that of waste reclaimers and BBCs. Data is typically collected through surveys, interviews, or observations, and statistical analysis is used to explore relationships between variables.¹² Ethical clearance for the data collection was obtained from the relevant ethics committee at UWC (HS23/7/18).

Data collectors were recruited in the areas of data collection to account for language barriers. That enabled the data collectors to conduct the surveys in the appropriate language. WhatsApp groups were created for each team to enable the researchers and data collectors to communicate and clarify uncertainties. The provinces were divided amongst the research team members to manage the data collection.

Data collection took place between 10 October and 20 November 2023. The surveys were completed with waste reclaimers and BBCs in 25 different towns and cities, covering all nine South African provinces (**Figure 1**). Consent forms were provided for each interviewee to complete before the survey. With the permission of the waste reclaimers and the BBCs, photos were taken and shared via WhatsApp groups. A total of 1,259 waste reclaimers were surveyed, with 74 to 240 surveys completed per province. A total of 31 BBCs were surveyed. Only BBCs that bought recyclable materials from waste reclaimers were included in the survey. BBC surveys mostly took place at the same time as the waste reclaimer surveys. A convenience and availability sampling process was followed when selecting waste reclaimer respondents which means that those available and willing to participate were surveyed. Respondents had to be older than 18 years. Street waste reclaimers were interviewed at BBCs when they came to sell the products collected. Landfill waste reclaimers were interviewed on the landfills after permission was obtained to

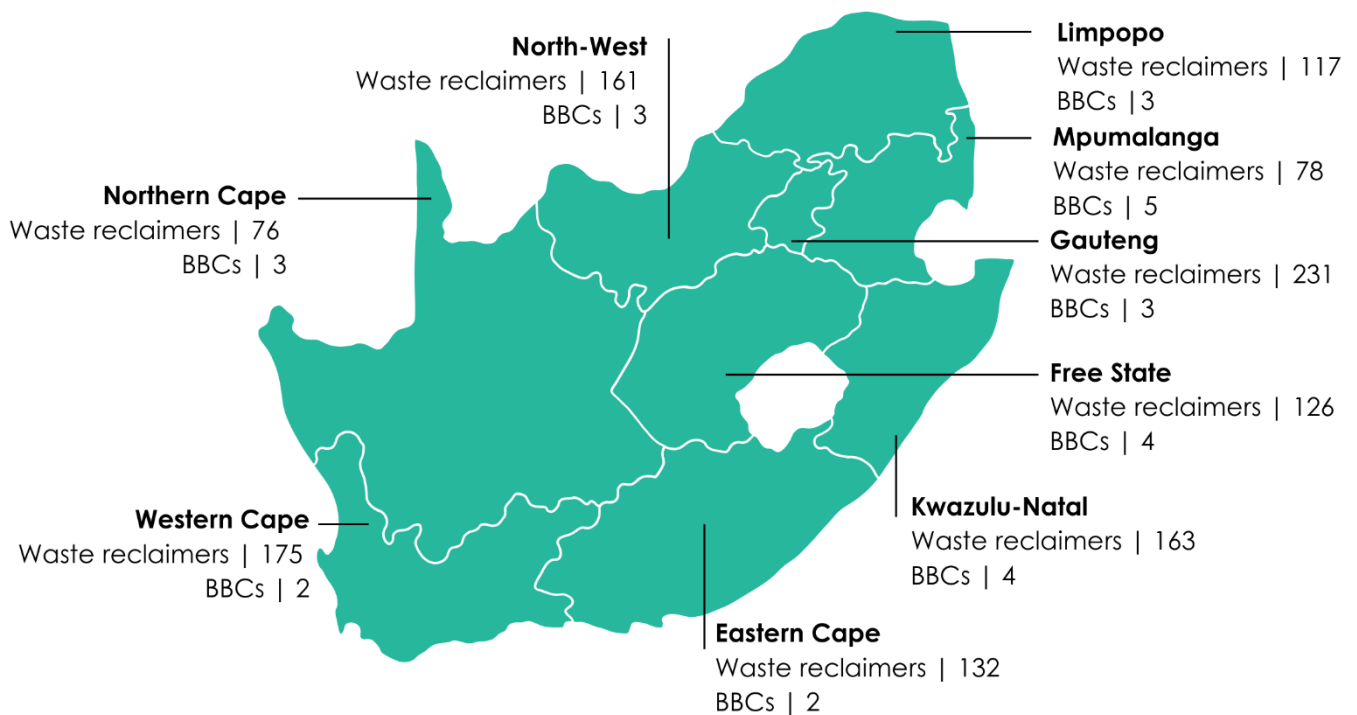
¹ Alexander, L.K., Lopes, B., Ricchetti-Masterson, K. & Yeats, K. 2015. *Cross sectional studies ERIC Notebook*. 2nd ed. University of North Carolina, Department of Epidemiology. Available at [link](#)

² Wang X, Cheng Z. 2020. *Cross-Sectional Studies: Strengths, Weaknesses, and Recommendations*. *Chest*. Jul;158(1S): S65-S71. doi: 10.1016/j.chest.2020.03.012. PMID: 32658654. Available at [link](#).

access the landfills. In Cape Town the African Reclaimers Organisation (ARO) assisted in organising neighbourhood waste reclaimers to gather at a hall in Khayelitsha, where they were surveyed. Similarly, access to waste reclaimers on landfills and streets in Bloemfontein and Johannesburg were facilitated by the South African Waste Pickers Association (SAWPA) and ARO respectively. From the onset of the data collection, it was clear that the section of the questionnaire, that focussed on financial aspects, was going to be challenging to complete – in particular, where waste reclaimers did not receive receipts following the sale of their materials.

All data was captured on and analysed using Microsoft Excel and descriptive statistics such as frequencies, percentages, and means were used to summarise the data. Qualitative data were used in support and clarification of the quantitative data. Standalone qualitative data were analysed using thematic analysis. Data was analysed provincially as well as overall.

Figure 1: Surveys completed per province



3.0 Waste Reclaimers

Waste reclaimers are widely regarded as the “backbone” of the current recycling activities in South Africa, collecting waste and directing recyclables away from landfill and towards recyclers.³ Estimates for the total waste reclaimer population in South Africa varies, but it is believed there are about 90,000.⁴ Both men and women participate in waste reclamation, but women mostly work on landfill sites.⁵ Waste reclaimers are independent workers whose core business is trading, and who are dependent on commodity markets.

³ DEFF and DSI. (2020). *Waste Picker Integration Guideline for South Africa: Building the Recycling Economy and Improving Livelihoods Through Integration of the Informal Sector*. Available at: [link](#)
⁴ Godfrey, L.K. (2015). *Finding Value in Waste: Identifying Opportunities for Growth in a Secondary Resources Economy*. The 5th CSIR Conference, Ideas That Work, CSIR ICC, Pretoria, South Africa, 8- 9 October 2015. Available at: [link](#)
⁵ Blaauw, P., Pretorius, A., Viljoen, K. and Schenck, R. (2020). *Adaptive Expectations and Subjective Well-being of Landfill Waste Pickers in South Africa’s Free State Province*. *Urban Forum*, 31(1): 135-155. Available at: [link](#)

3.1 Survey of Waste Reclaimers: Overview

A total of 1,259 waste reclaimer surveys were completed. The survey revealed that waste reclaimers collect materials from various sources, including streets, landfill sites, households, and organisations. Sources of material are dustbins on streets (57%), kerbside bins (54%), and landfill sites (53%). There are other sources of materials, such as spaza shops, taverns, and schools. Materials are usually collected from a combination of sites.

Waste reclaimers collect a variety of material types, from high-value aluminium through to lower-value glass. The materials include beverage containers, other packaging items, and other waste materials – such as waste electrical equipment, scrap metal and paper. The survey highlighted that aluminium (88%), PET (78%), and HDPE (73%) are the most common materials collected by waste reclaimers. They transport the materials to BBCs in trolleys, grocery or bulk bags, horse carts, or “bakkies” (i.e., pick-up trucks). Some BBCs also offer collections from waste reclaimers. While 71% of waste reclaimers sell their material directly to BBCs, 23% sell their materials to other buyers with pick-up trucks. Waste reclaimers typically sort their materials at BBCs, residential areas, open spaces, roadsides, landfills, and at locations out of sight of the municipality. Before selling, most of the waste reclaimers store their materials in a variety of locations, including their homes, yards, street vendor storage, recycling stations, next to rivers, landfills, and informal settlements. Detailed results to the survey are presented below.

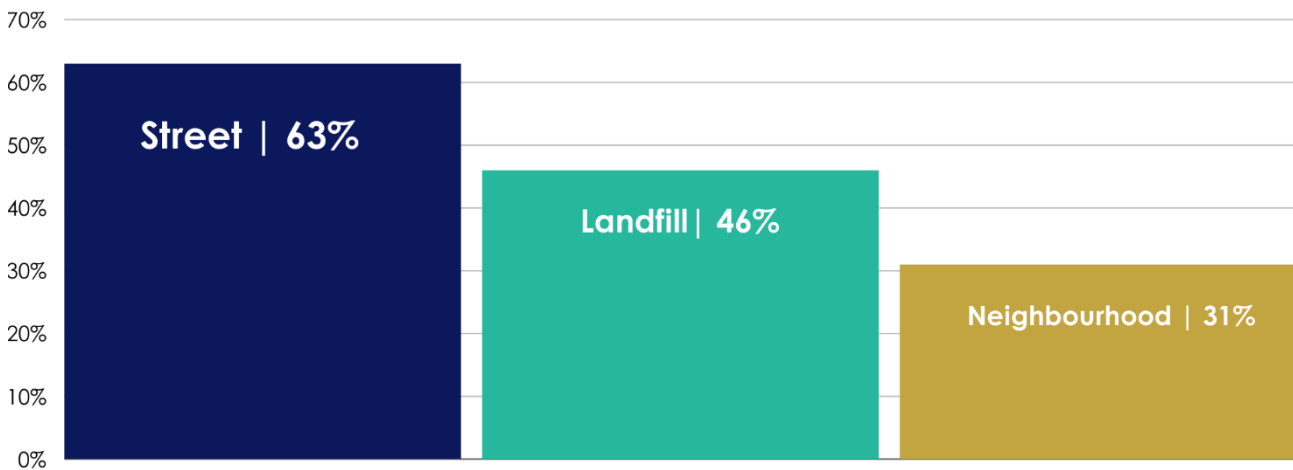
3.2 Detailed Survey Results

3.2.1 Personal Background of Respondents

3.2.1.1 Types of waste reclaimers amongst respondents

QUESTION 1 | N = 1252

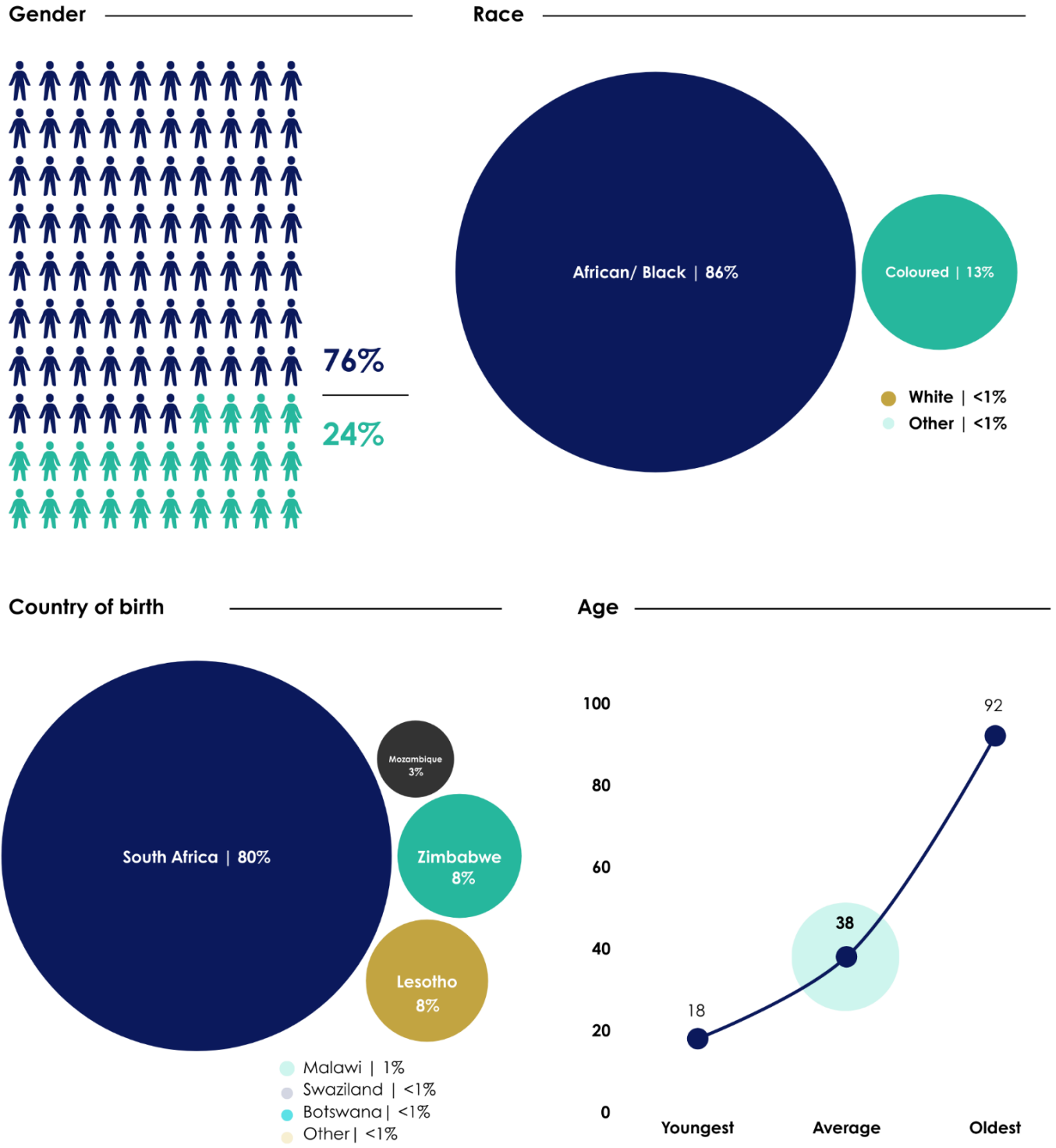
Figure 2: Types of waste reclaimers interviewed



3.2.1.2 Respondent demographics

QUESTIONS 2 - 5 | N = 1250

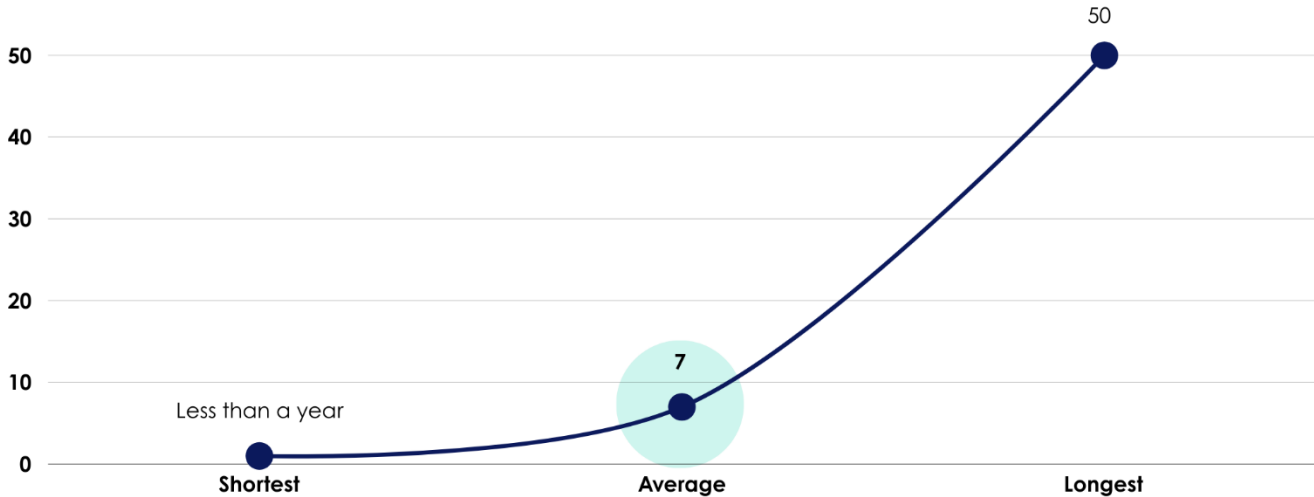
Figure 3: Demographics



3.2.1.3 How long have you been doing this job?

QUESTION 9 | N = 1257

Figure 4: Number of years working as a reclaimer



Summary of personal background of respondents


- The majority of respondents (63%) are street waste reclaimers.
- 76% of the respondents are men.
- 86% of the respondents are African/ Black, followed by Coloured⁶ (13%).
- 80% of the respondents indicated South Africa as their country of birth, followed by Zimbabwe (8%) and Lesotho (8%).
- The respondents' age ranged between 18 and 92, with 38 years as the average.
- The average number of years respondents have been reclaiming is 7.

3.2.1.4 Why did you decide to collect recyclable materials?


QUESTION 8 | N = 1259



A SUCCINCT RESPONSE:





“I was broke and jobless without a qualification”

Theme	Waste Reclaimers' Responses
 1 Poverty and unemployment	<ul style="list-style-type: none"> • Poverty and there is no money coming from anywhere at my home • There was no job for me as I lost the one I had and realised it (work) will not be there for a long time • It was unemployment that forced me to collect, sort and sell waste for survival • There is no jobs in the country

⁶ Coloured was a legally defined racial classification during apartheid referring to anyone not white or of the black Bantu tribes, which effectively largely meant people of colour or mixed race.

Theme	Waste Reclaimers' Responses
	<ul style="list-style-type: none"> • Was staying in streets and it seemed like suitable work • Unemployment made me to resort to picking waste because no one wanted to help me and my family. I had to find means to make money • Here was no job when I came in SA. I decided to do this job • Lost my job as a domestic worker, fired by my boss lady • I got retrenched from work, needed money for cosmetics and then I heard of this opportunity • Unemployed, is even (more) difficult because I am foreign national
 <p>2</p> <p>I was in prison and struggled to find employment</p>	<ul style="list-style-type: none"> • I was in prison so I didn't find a job. I have a criminal record. • Work is scarce and I don't want to do crime anymore. I was in prison before and want to earn an honest living
 <p>3</p> <p>To provide additional income</p>	<ul style="list-style-type: none"> • I have no other option and pension is not enough • Extra money • I need to make extra cash for living
 <p>4</p> <p>Lack of education prevent access to employment</p>	<ul style="list-style-type: none"> • Lack of education • Have no qualification for any other job • Dropped out of school • When I realised there are jobs for unskilled individuals • I had no job and job opportunities were limited because I did not go to school
 <p>5</p> <p>To take care of family</p>	<ul style="list-style-type: none"> • To be able to take care of my family • There was no food for my family so had to find something to provide for them • I lost my husband and I had to come here and work for my children • In order to support my daughter who is studying overseas


Theme	Waste Reclaimers' Responses
 <p data-bbox="341 405 363 436">6</p> <p data-bbox="177 445 528 477">I don't have family support</p>	<ul data-bbox="608 349 1310 436" style="list-style-type: none"> • <i>Because I don't have parents and I am unemployed</i> • <i>I am struggling I do not have parents</i>
 <p data-bbox="341 707 363 739">7</p> <p data-bbox="217 748 488 779">I learned from others</p>	<ul data-bbox="608 539 1378 824" style="list-style-type: none"> • <i>My aunt was doing it in Venda (rural area in SA)</i> • <i>It was my Aunt's work. So she groomed me.</i> • <i>Joined my parents in this work because I saw that we can survive on this job</i> • <i>Heard about this business from my cousin</i> • <i>It's a family habit as my father is a recycler</i>
 <p data-bbox="341 996 363 1028">8</p> <p data-bbox="212 1037 493 1104">Waste reclaiming provides easy money</p>	<ul data-bbox="608 846 1414 1131" style="list-style-type: none"> • <i>It was easy money</i> • <i>Easy and accessible</i> • <i>Wanted money everyday</i> • <i>Because of getting fast cash</i> • <i>I left my job to do this. I got ZAR 1500 a month and I felt I can make more reclaiming</i>
 <p data-bbox="341 1301 363 1332">9</p> <p data-bbox="212 1344 493 1451">Waste picking allows self-employment and independence</p>	<ul data-bbox="608 1153 1461 1509" style="list-style-type: none"> • <i>Because I get to be self-employed and earn my own money</i> • <i>To work at my own way and pace</i> • <i>There are no time sheets, I work the way I want.</i> • <i>Do not want to be employed. I feel empowered by owning my source of income. It all depends on me and my hard work to reach my targets</i> • <i>Because he doesn't want to ask for money from people- no one even the family</i>
 <p data-bbox="336 1662 376 1693">10</p> <p data-bbox="177 1702 528 1733">Keeps me busy and active</p>	<ul data-bbox="608 1585 1230 1733" style="list-style-type: none"> • <i>It keeps me busy and gives me money</i> • <i>Wanted to keep myself busy</i> • <i>It keeps me fit and I can earn an extra income</i>

Theme	Waste Reclaimers' Responses
 <p>11</p> <p>Waste picking keeps them out of criminal activities and drugs</p>	<ul style="list-style-type: none"> • I am avoiding engaging in criminal activities • Because I am not working and I am avoiding to steal • Because I was avoiding to be a criminal • To stay away from trouble and make my own money • To avoid stealing and being part of community gangs • Better option than gangsterism, brings an income
 <p>12</p> <p>To sustain drug use</p>	<ul style="list-style-type: none"> • Because I got addicted to drugs and needed money to buy my drugs • Because of peer pressure and drug abuse • Because I was smoking drugs and end up being on the street
 <p>13</p> <p>For a cleaner environment</p>	<ul style="list-style-type: none"> • To sustain healthy environment and no to littering • To clean the environment and make money • Cleaning is my favourite and I like the nature • It keeps area and rivers clean • To protect nature in avoiding waste to end up lying in communities, to acknowledge the importance of recycling
 <p>14</p> <p>Like to do waste picking</p>	<ul style="list-style-type: none"> • I love the job • Because I like the job and also suffering from hunger • Because I like this job

3.2.2 Experience of Waste Reclamation as a Job

3.2.2.1 What do you like about your work?

QUESTION 6 | N = 1259

 <p>1</p> <p>Earning an income</p>	<ul style="list-style-type: none"> • To be able to make quick money to buy what is needed • It is about making an income • Provision of food through my job • Fast cash every day • I can hide my poverty with the job • There is money other than buying nothing
--	---



2

Providing for my family

- Able to build myself a future and secure things for my family
- Saved my life, my children have their needs catered for
- I feed my children, they go to school with waste picking incentives
- Pay school fees and buy food stuff with money made from sales
- I was unemployed I was able to take my children to school and build a house for them
- I raised my grandchildren and children with recycling



3

Keeping me out of crime and drugs

- I earn an honest living-take me away from the streets
- I am able to send money home. I am not idling or involved in criminal activities
- Keeps me out of crime and of jail
- Like to do handy jobs, keeps busy, like to be busy, away from drugs



4

Being self-employed/independent

- I am my own boss. I make my own schedule and knock off when I want
- I am my own boss. I don't wait for the 20th/ 25th/ 30th to have money
- Earn own money without supervision
- I'm not depending on anyone. I make my own money.
- Working peacefully alone
- I am independent, I work the way I want without taking instructions from anyone
- I was struggling to get work so instead of complaining through this job I can employ myself
- Freedom and to have his own money



5

Having good relationships and support

- Money makes life easier, made new friends, happy place to be
- I have become family with the other guys who do the same work and we can bail each other out when it is bad
- It is good to work with other women, we plan stokvels
- Income and meeting new people



6

Keeping the environment clean

- I just like cleaning the environment
- I want the place/ environment to be clean
- To keep place very clean every time



7

Having good mental health

- *I have a reason to wake up in the morning. It saves me from depression.*
 - *Gives me a purpose*
 - *We are always happy because we make an honest living and not home depressed*
 - *After my divorce I was depressed, this job gave me purpose*
 - *Putting food on the table. I am not stuck and depressed in the location*
- I get peace and not think about my debts*
- *To keep himself busy*
-



8

Having good physical fitness

- *It keeps me busy and I also exercise every day. I don't easily get sick.*
 - *They are able to clean around, it keeps them fit*
-



9

I do not like the work but it's the only way to survive

- *I don't enjoy anything. There are a lot of fighting and robberies*
 - *Nothing*
 - *There is nothing to like*
 - *Nothing I don't like but don't have a choice*
 - *It is something that is not good but I have no choice*
-

3.2.2.2 What do you not like about your work?

QUESTION 7 | N = 1259



1

I don't have a choice

- *Nothing but don't have a choice*
 - *She is old and sick but still has to work because she is the only one working at home*
 - *I don't like to skarrel (picking waste).*
 - *Nothing, (but) it's hard to find jobs*
-



2

Working conditions: Dirty and unhealthy

- It's a very filthy job
- It is very unhealthy where they pick waste
- Human waste in waste stream
- When the bins are full of worms
- Handling goods that smell actually (such as Pampers) and hazardous waste such as chemicals, sanitary pads
- Dust particles transmit disease., Medical waste is dumped here so we are likely to be infected



3

Working conditions: Physical challenges

- Working in harsh weather conditions (rain, wind and freezing mornings). Just like today, windy and unbearable
- I get hurt sometimes
- Contracting diseases and inhaling toxic substances during collection
- I am struggling to pull the bag I don't have a trolley I push the trolley, very far
- Weather conditions, pushing trolley is difficult, attitudes of the residents
- Long hours on the streets
- Working in a dangerous place as some people jump on trucks while moving
- Likelihood to be hit by cars
- Harsh weather we work in. Freezing mornings and winters
- We are short of PPE (fully equipped) It affects our health



4

Payment insufficient and inconsistent

- Collecting does not pay much
- The money we make is too little and it keeps getting worse
- Payment that doesn't match the effort
- Fluctuation of prices



5

Not being appreciated by the public and stigmatised

- Being taken for granted by the community
- I don't like that people look down on me
- Lack of dignity, decrease self-esteem
- When people are rude and chase you from the area
- Get dirty and people look down on you
- Bin owners would fight us when we collect waste



6

Competition among waste reclaimers

- *There are many: numbers increase so we are sometimes unable to reach daily targets or make enough.*
- *Competition - we compete for goods.*
- *Overcrowded on the landfill, too many people fighting over same material.*



7

Unfair treatment by institutions

- *When the Buy Back Centre cannot understand that you made a lot of effort*
- *Security chasing them away from areas where they can collect recyclable waste*
- *Police search us all the time and lock us for finding goods like cell phones, laptops. They don't believe we pick those items from waste. I have to answer for them.*
- *The municipality hurt us by removing waste we collected without our consent*



8

Fighting and theft among waste reclaimers

- *We fight with other waste pickers*
- *Theft, some steal our stuff, conflicts among others, unnecessary fights*
- *Other waste pickers are bullies they always steal my goods*
- *Other pickers are jealous*



9

Exposure to criminal activities in general

- *Gangsters in the road*
- *When other people start robbing others whilst collecting*
- *Kids who sleep by the landfill make our work unbearable by intimidating us. They steal our waste when stored.*
- *The 'nyaope' (drug) boys normally burn the waste and this is a big challenge because it leaves us with no choice but to not sell anything*
- *I am bullied by 'Tsotsis' (criminals) here*
- *I do not like to be bullied by 'amaphene'*

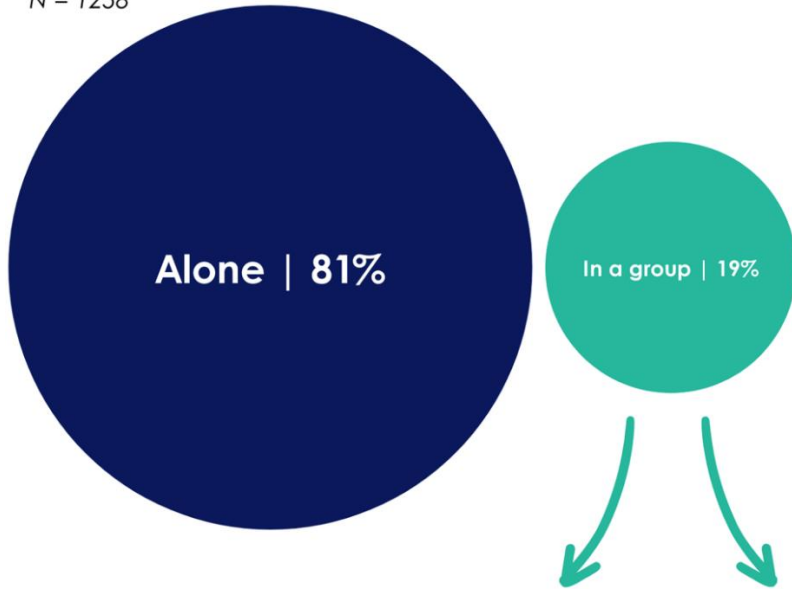
3.2.2.3 Do you prefer working alone or in a group?

QUESTIONS 10 – 13

Figure 5: Preferences for working alone or in a group

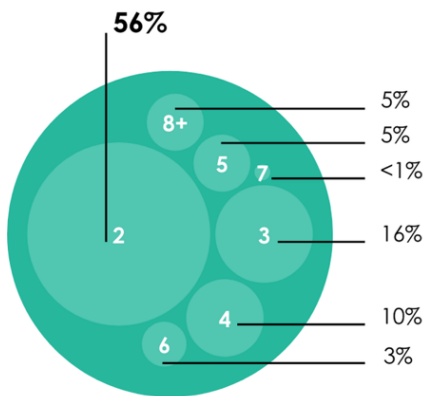
Do you work alone or in a group?

N = 1258



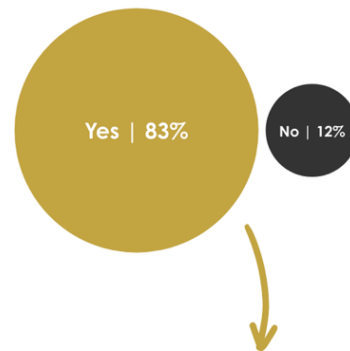
How many collectors are you in the group?

N = 238



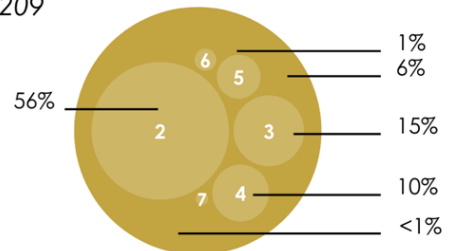
Do you share your income with another waste collector?

N = 241



With how many other waste collectors do you share your income?*

N = 209



Notes

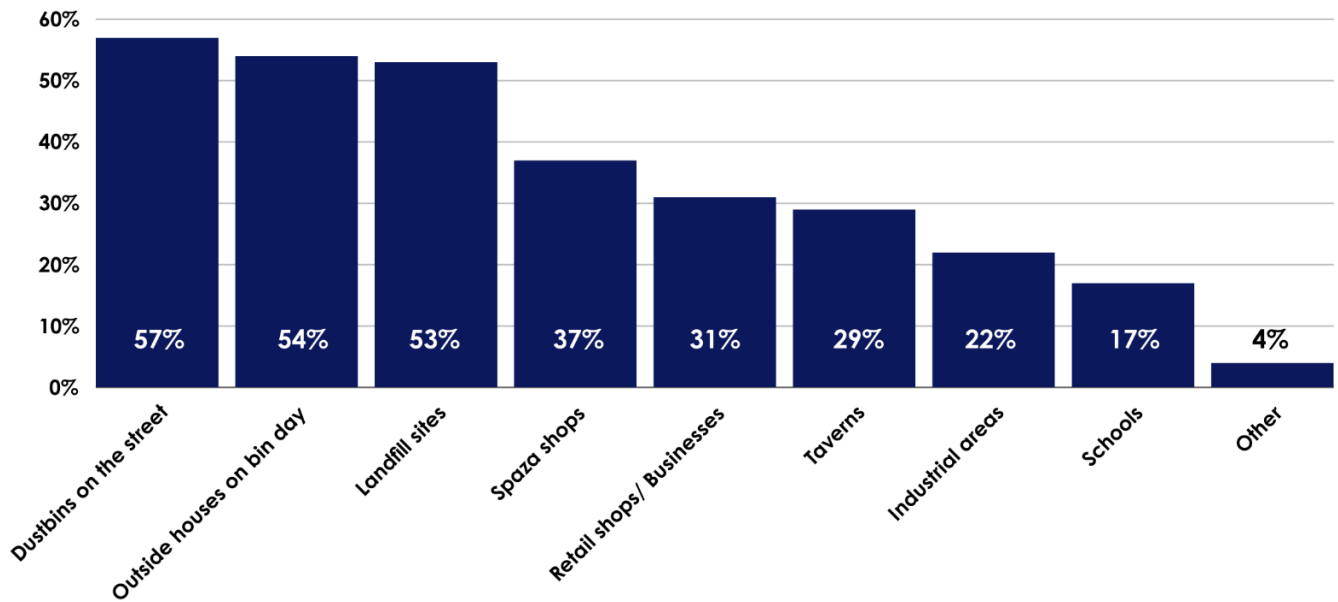
- Most respondents (81%) prefer working alone rather than in a group (19%).
- Where respondents indicated that they preferred working a group, more than half worked with only one other person in a group of 2.
- Where respondents indicated that they preferred working in a group, 83% share their income.
- **Note** that Question 13, “With how many other waste collectors do you share your income?” may have been misinterpreted by respondents. As per question 11, most respondents work in groups of 2, so the question may have been understood as referring to how many dependents rely on the respondent's income, not how many waste reclaimers they share their income with.

3.2.3 Particulars of Work: Where, What, When

3.2.3.1 Where do you find the recyclable materials you reclaim?

QUESTION 14 | N = 1258

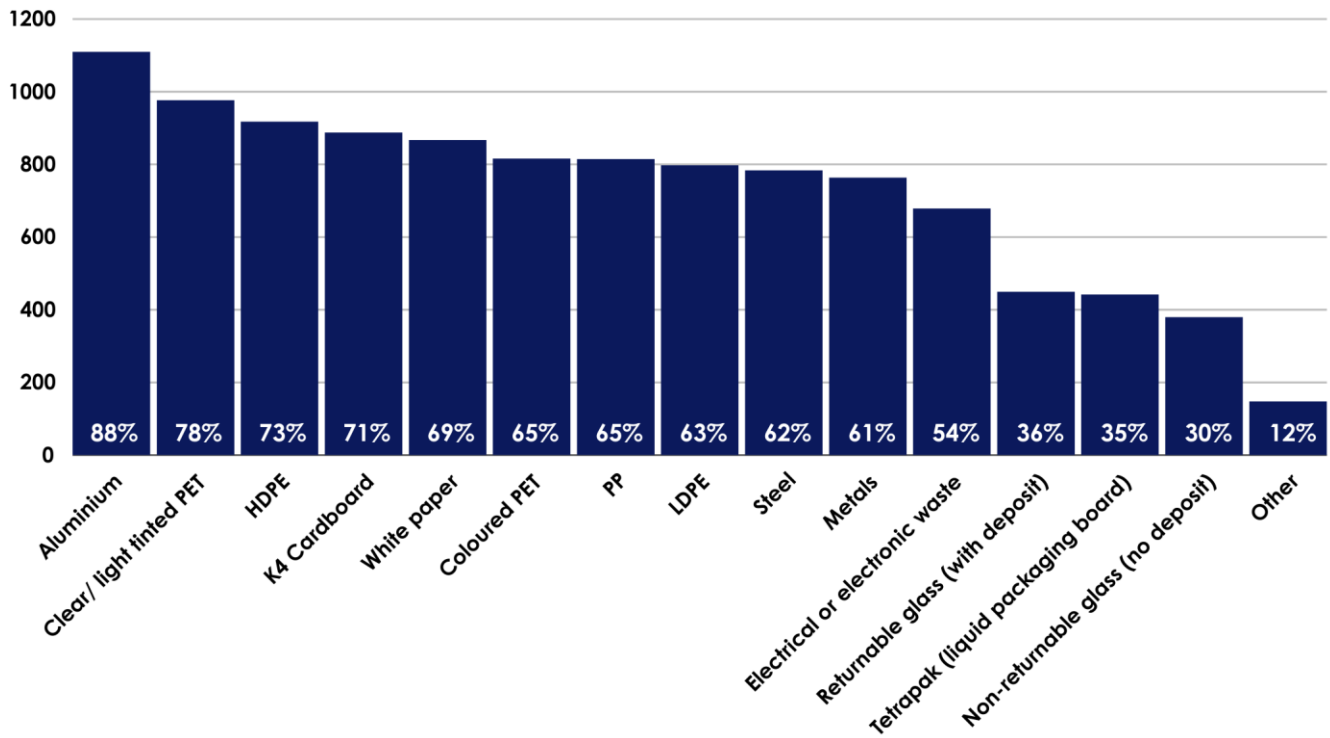
Figure 6: Where recyclable materials are found



3.2.3.2 What recyclable materials do you collect?

QUESTION 15 | N = 1258

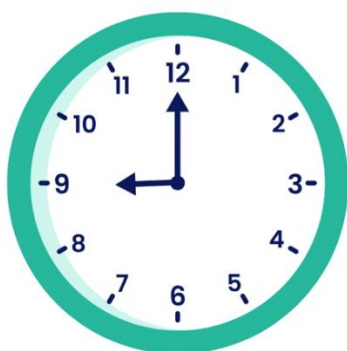
Figure 7: What types of recyclable materials are collected



3.2.3.3 How many hours do you work per day?

QUESTIONS 16 - 17 | N = 1250

Figure 8: Working hours per day



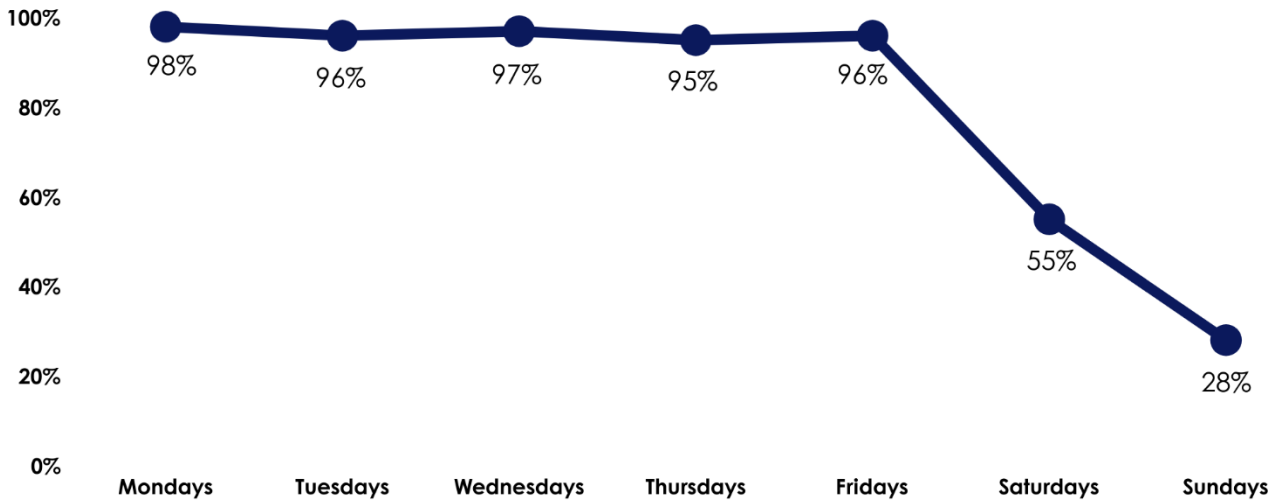
9 hours

The average and median number of working hours per day

3.2.3.4 Which days of the week do you usually collect waste?

QUESTION 18 | N = 1258

Figure 9: Working days per week



Summary of Work: Where, What, When

- The most common places to collect materials are from dustbins on the street (57%), from household bins on waste collection or ‘bin’ day (54%), and from landfill sites (53%).
- More than half of the respondents collect materials in one or more of these spaces.
- 88% of respondents indicated that they collected aluminium.
- Respondents typically work for an average of 9 hours per day. The median is also 9 hours per day.
- Respondents typically collect materials on weekdays between Monday and Friday.
- Over the weekend respondents indicated that they worked less, with 55% collecting on Saturdays, and only 28% collecting on Sundays.
- Working during weekdays could possibly be influenced by waste collection days that typically fall on weekdays, or because BBCs are most commonly open on weekdays and not on weekends.

3.2.4 Sorting and Storing Materials Before Selling

3.2.4.1 Where do you sort your collected materials?

QUESTION 20 | N = 1259



1. **At, in front of, or close to the BBC**

- Next to BBC
- In the road outside the BBC
- The corner next to BBC
- At the gate of the BBC



At the place where the respondent resides

- Sort at home
- In the yard at home
- At my parent in-law's house where I am staying
- Where I stay behind my brother's house
- Outside of my shack
- At home, a space is allocated in the front yard
- At home in shack at the back
- I sort everything here outside 'Skwatta camp' (name of the informal area where many reclaimers live -Pretoria, Gauteng)



In the place where the respondent resides

- In my bedroom, a shack that is not in use
- In my house as I have no other place. Neighbours complain when it is outside the yard
- I sort in my shack
- I do it in my house



Open spaces

- A field at home
- Under the bridge
- Next to my house in or green space
- In the container in the green space



In the road

- In the road where I pick the waste
- In the road where the waste is collected
- I live on the street and sort on the street



While working

- Immediately while picking up
- While I am collecting/picking the waste
- Next to the bin, I take what I need as I do not have a trolley
- At source, immediately after collecting in front of houses
- Next to the road (where) I am picking. I try not to pick/ take non-recyclable items
- Along the pavement while collecting from bins
- Hospital site where they collect.



On the landfill

- They sort as per type in the landfill until all bags are full and then collected
- On landfill site
- At landfill along the river
- I make space to sort and store my material here at landfill.
- I have my own space at landfill.



8. **Anywhere out of sight of the municipality**

- Anywhere, I cannot be disturbed by the municipality
- Anywhere, I find a place but not where I can be attacked by the municipality



9. **Next to the river**

- Store at river.
- Separate as much as I can at river



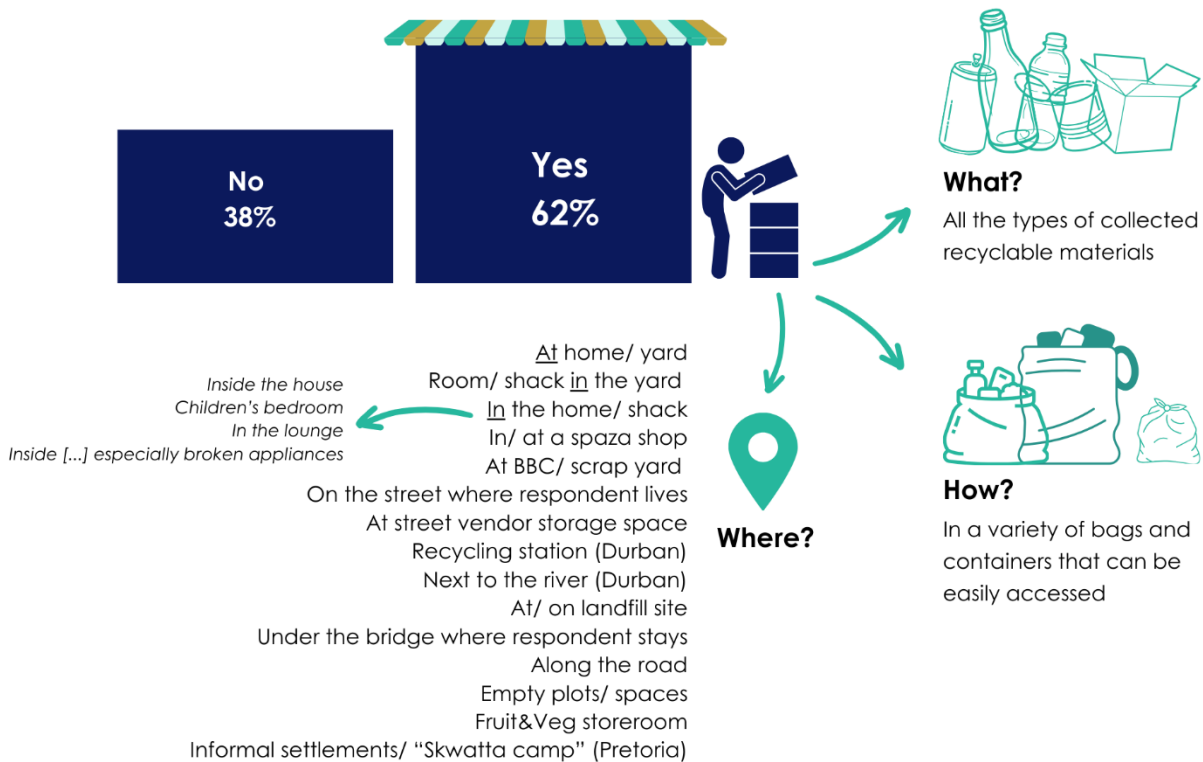
10. **OTHER**

- I ask the owners of taverns to store for me and after a week I collect from them.
- At the waste collection container.
- Taxi rank (Majakathatha Taxi rank).

3.2.4.2 Do you store your materials somewhere before selling it?

QUESTIONS 21 – 23 | N = 1256

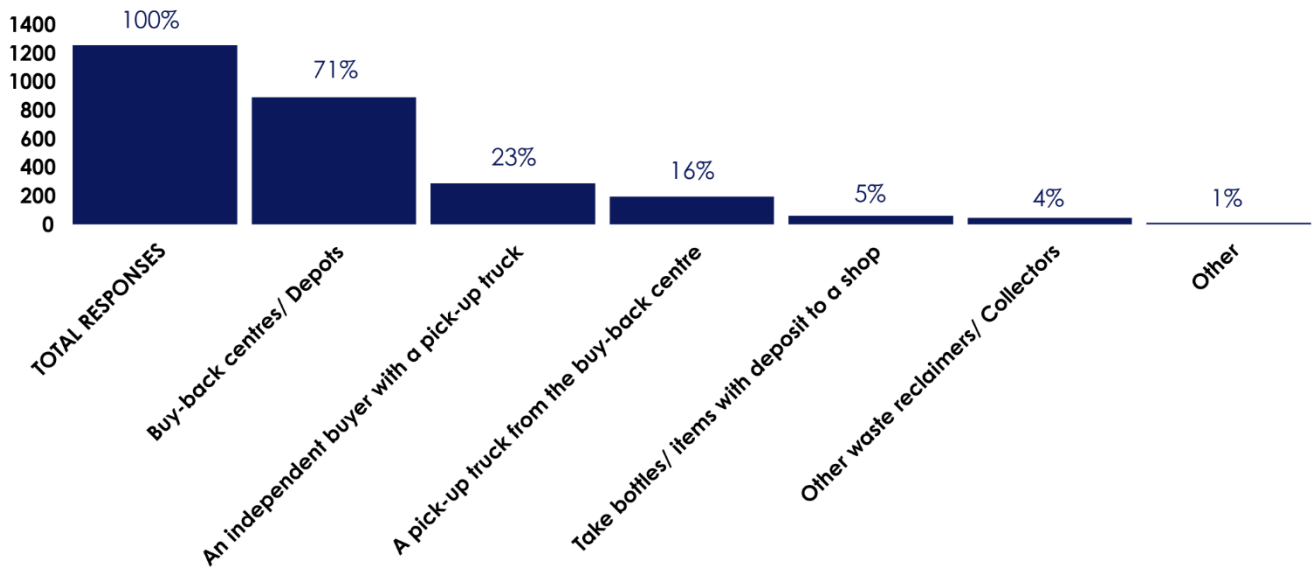
Figure 10: Storage of Materials



3.2.4.3 To whom do you sell your collected recyclable materials?

QUESTION 19 | N = 1258

Figure 11: Buyers of Materials



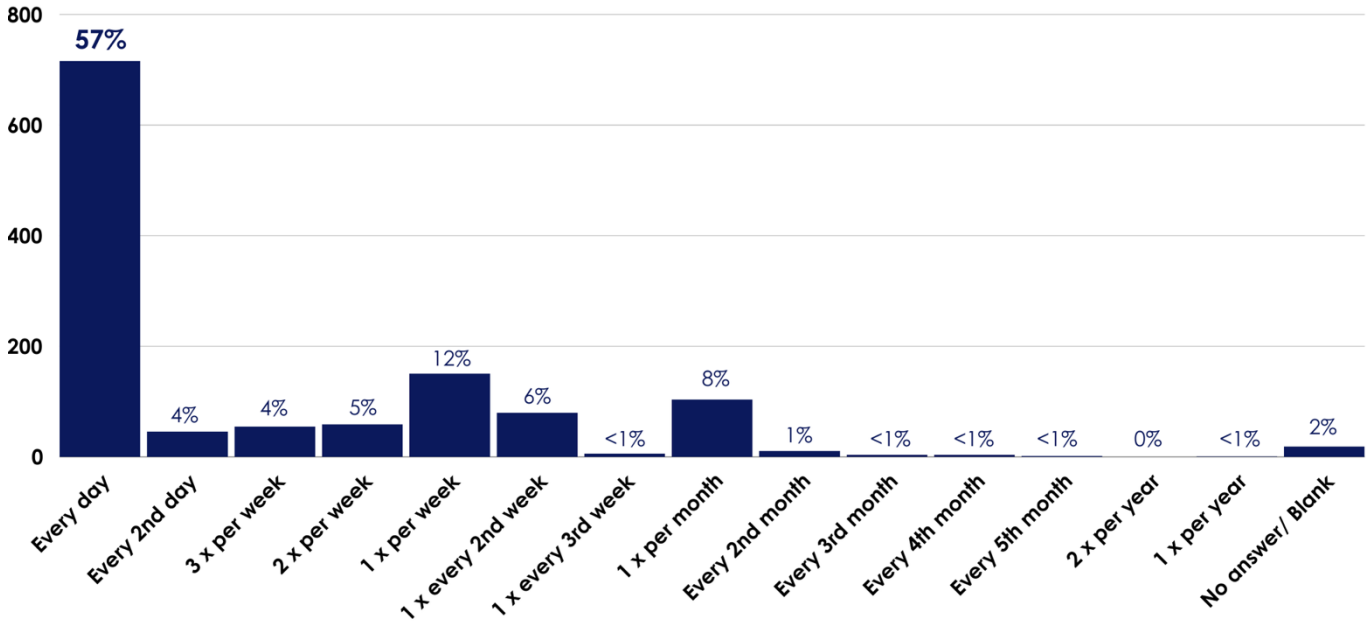
Summary of sorting and storing materials before selling

- Materials are sorted in various spaces, ranging from the vicinity of the BBC to which they sell, in or around their place of residence, as they are collecting on landfill sites and elsewhere, or in public spaces.
- Almost two-thirds of respondents (61%) store the materials they collect before selling it, commonly in or around their place of residence.
- 71% of respondents sell materials directly to BBCs (the most mentioned buyers), 23% sell materials to independent buyers with a *bakkie*/ pick-up truck, 16% sell materials to a BBCs in *bakkies*/ pick-up trucks.
- 5% of respondents take returnable bottles or items back to a shop for a deposit.

3.2.4.4 How often do you sell the materials you collect?

QUESTIONS 24 | N = 1258

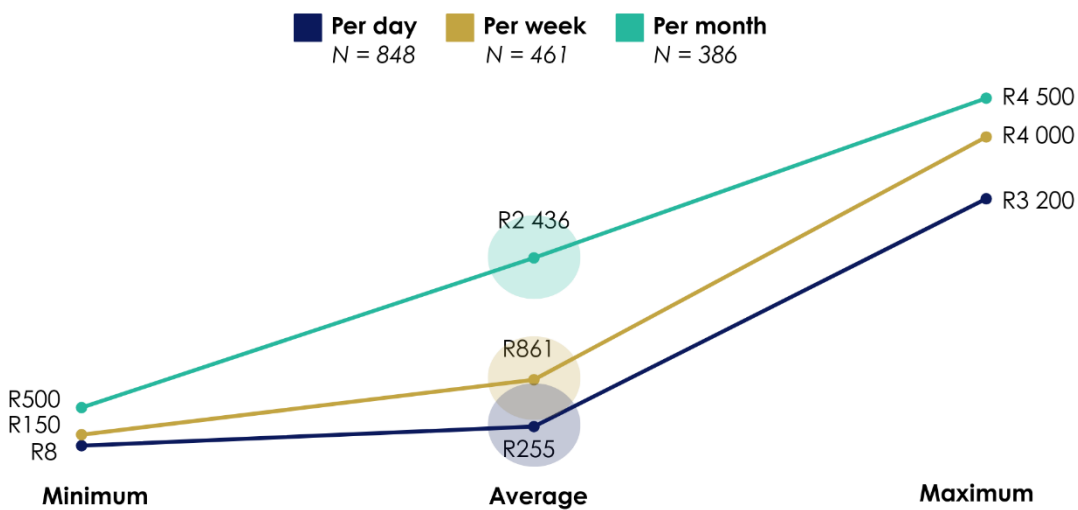
Figure 12: Frequency of Selling Materials



3.2.4.5 How much income do you usually earn for a 1) day's, 2) week's, and 3) month's waste that you collect?

QUESTIONS 25 | N = 1256

Figure 13: Waste Reclaimers Income (ZAR) per day, week, and month



3.2.4.6 How many of each material did you have, what was the total weight, the price per kg and/or total income you got for these items the last time you sold your waste?

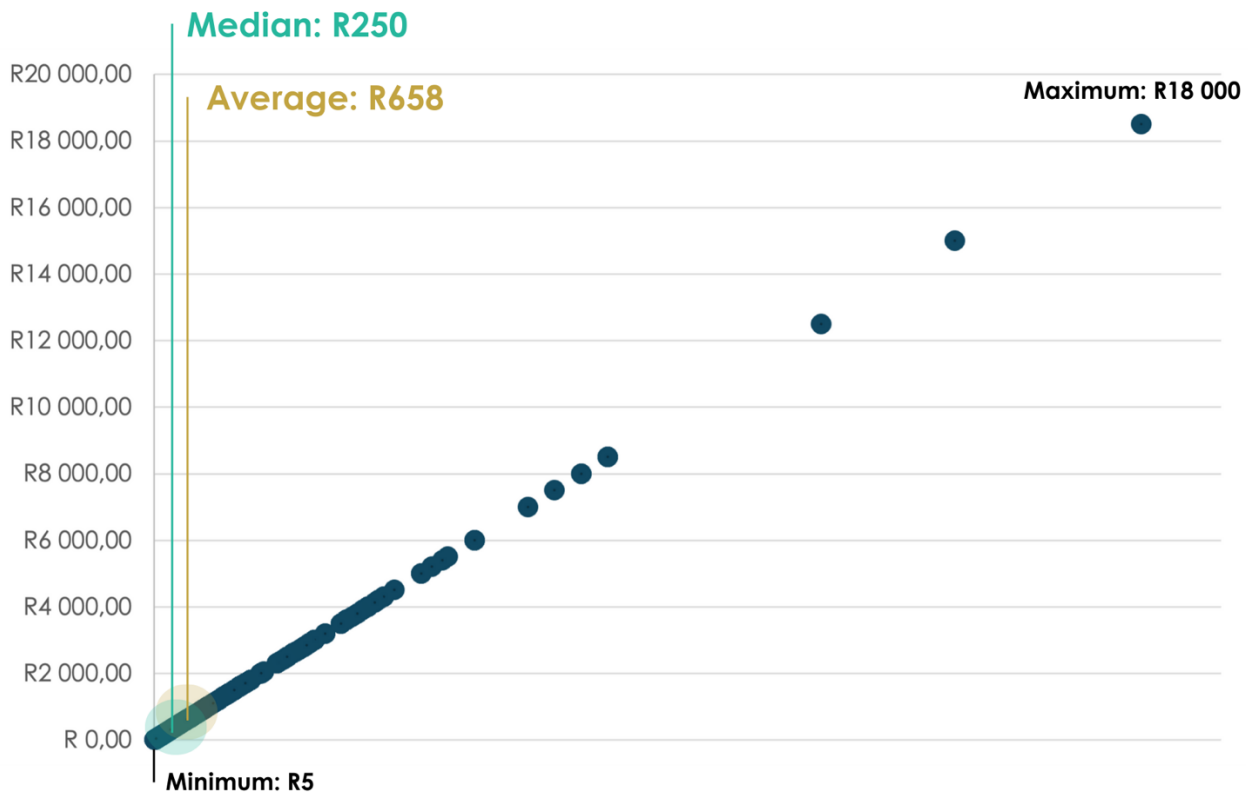
QUESTION 26 | Less than 50% of the respondents answered this question.

This question aimed to gather information on the relation between the quantity, weight, and income from the sale of recyclable materials. However, the data collected from this question was deemed unreliable. It appears that the respondents either do not have accurate records (slips) or lack financial literacy leading to inconsistent and unverifiable answers. As a result, only an average price per kilogram was calculated, which is acknowledged as incorrect when cross-referenced with existing data on the prices paid for recyclable materials. For more accurate pricing information, data from other sources, such as the BBCs themselves, should be used. The unreliable outcome of this question highlights the need for education on financial literacy among waste reclaimers to ensure they are aware of the payments they are entitled to receive for the collected materials.

3.2.4.7 What is the total income you got for the materials you collected the last time you sold it?

QUESTION 27 | N = 1219

Figure 14: Income from Last Date



Note that the responses varied significantly, with a minimum income of ZAR 5 and a maximum of ZAR 18,000 (although only 3 out of 1219 responses reported earning more than ZAR 10,000). Taking all responses into account the average was ZAR 658. The median income was ZAR 250, which is a more accurate representation of the earnings received. Most respondents earned considerably less than the maximum

reported values, suggesting that some of the amounts of ZAR 5,000 upwards (as can be seen on the graph) are not representative of the general earnings within this group. It must also be noted that often the income reported was not for an individual reclaimer but for a group working together, as was the case with the maximum amount recorded. These values must thus be interpreted circumspectly.

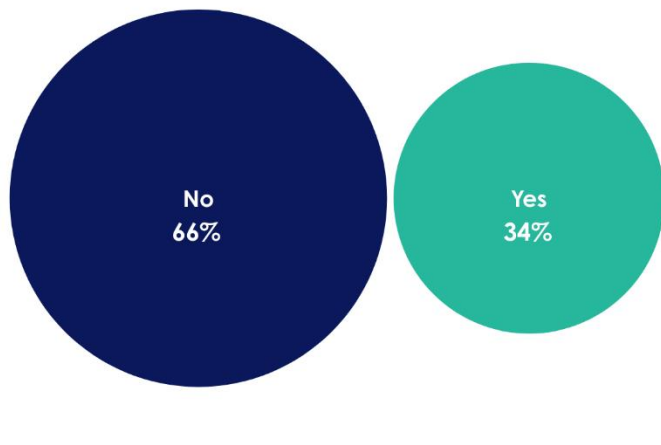
3.2.4.8 Additional income and grants

QUESTIONS 28 - 30

Figure 15: Additional sources of income and grants

Do you have any other source of income available to you?

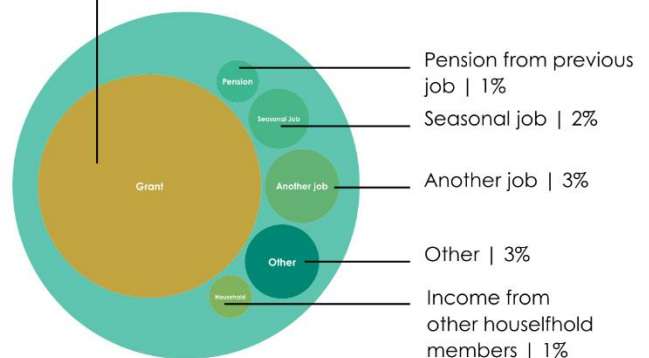
N = 1258



What are the other sources of income available to you?

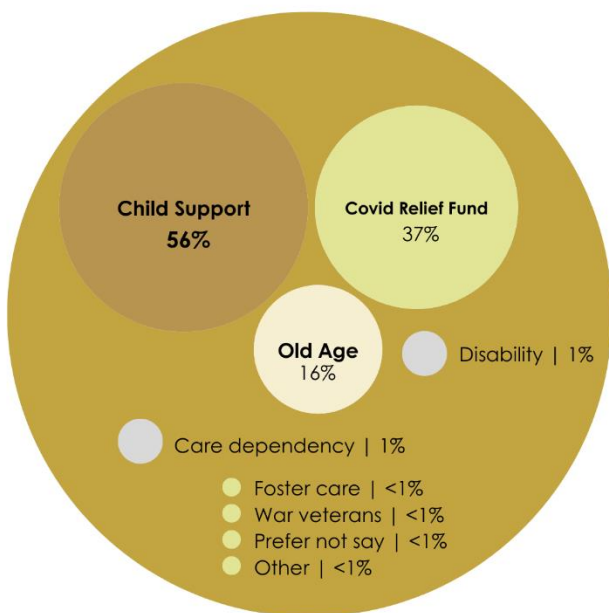
N = 423

Grant | 79%



What type of grant do you receive?

N = 334



Summary of Income Patterns

- 57% of respondents, more than half, sell materials daily, 12% of respondents sell materials weekly, 8% of respondents sell materials monthly.
- Respondents earn an average of ZAR 255 per day, ZAR 861 per week, and ZAR 2,436 per month.
- 66% rely on waste reclamation alone as a source of income, 34% have an additional source of income.
- Of this 34%, almost 80% receive grants, commonly for child support, Covid relief, and old age.

3.2.5 Safety at Work

3.2.5.1 What injuries have you sustained, or sicknesses have you gotten, when collecting recyclable materials?

QUESTION 31 | N = 1259



1

Cuts/ Scratches/ Pricks from sharp objects

- Get scratched on the hands
- Cut by a bottle and pricked by a nail
- Hand sustained injuries from tins and sharp tools or object
- Since working in landfills you would get cuts because you have to dig in for waste
- Just cuts from the cans and glass
- Cuts from glass because we don't have gloves
- Palm tree pricks on legs and had to stay at home for 6 weeks
- Thorny bushes also disposed of by maintenance personnel
- Bitten by spider on hand and cut by glass on hand



2

Injuries during dismantling and pre-processing of e-waste

- I hurt myself with a hammer at times
- From crushing the cans we hit hard by hammer
- Burned while burning cables



3

Respiratory/ Airborne pollutants

- Coughing because of dust
- Asthmatic because of dust
- I had TB because of this place
- I was diagnosed with TB, however I am not sure if I got it through this work
- I had non-stop coughing



4

Dermal/ Skin issues

- Skin gets infected by things here and too much sun
- Skin gets wrong infection
- Get tired hands are itching because infected
- Itching hands with wounds, no gloves



5

Eye infections

- I am sick. Skin infection, eye infection
- Inhaling dust leads to lung and eye damage/ infection
- Eye itching, skin problems



6

Circulatory problems

- Swollen feet from walking all the time
- Swollen feet, fever, back pain



7

Musculoskeletal issues

- Back pain because we walk too much
- Leg pains
- Body pains and cuts
- Back problems due to heavy lifting and picking of waste
- Only back pains in most of the time, because we work physical often



8

Broken or sprained limbs

- I sprained my leg
- Broke my hand with a trolley
- Due to heavy load, you would fall and be injured and cuts from waste
- Yes - I once broke my leg, I was hit by a car



9

Injuries caused by vehicles

- Yes, once a truck drove on my toe
- I was hit by one of the trucks while working
- I was hit by a car and hospitalised
- Got hurt by a tractor on my leg
- Because we use trolleys we get hit by cars (SWP)
- I was involved in a hit and run and until today, I don't know the person who hit me with his car. I broke a leg and arm.



10

Injuries caused by trolleys

- I get hit by a trolley often but I don't sustain serious injuries
- My leg was once broken by a trolley, it hit me so hard
- I get hit by a trolley way more often but never sustain serious injuries
- Broke a hand while pushing a trolley
- I was once hit by a trolley, it was so bad that I got hospitalised



11

Injuries from fights with each other or outsiders

- Injuries from fights because people would fight for streets
- Some thugs would take our stuff and hurt us with knives
- Stabbed with knife twice by other pickers
- Assaulted by other pickers, hit and run
- Assaulted by one home owner thinking that I wanted to break in to their home
- Criminals attacked me when I was pulling my trolley at night
- Stabbed with a screwdriver



12

Exposure to chemicals and medical waste

- You would get contact with medical waste and chemicals when you reach for waste which endangers us as a picker
- Piercing by injecting syringes or nails carelessly disposed by hospitals.
- I believe I got infected by HIV by handling waste, with bare hands. Hazardous waste such as needles and sanitary pads



13

Bitten by dog

- Dog bites, finger cuts.
- Bitten by dog in the white suburbs
- I was bitten by a dog a week after I started doing this work.



14

Exposure to harsh weather conditions

- Fever, it rains here sometimes
- I get sick when it is too hot with headache
- Alzheimer because of sun
- Nausea because of the sun
- Skin condition from the sun
- When it rains, we get sick.



15

Eating spoiled food

- Stomach cramps because of food we eat (from the landfill)
- Pressure because of food I had



16

No injuries

- No injuries
- No, I have never secure/sustain any injury or sickness
- No injuries - I wear gloves

3.2.6 General

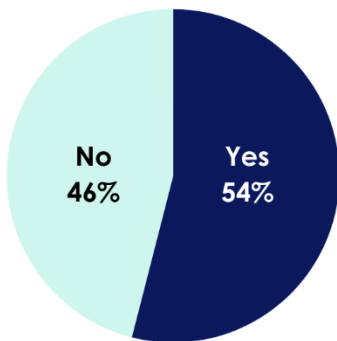
3.2.6.1 Access to technology

QUESTIONS 32 - 33

Figure 16: Waste Reclaimers With and Without Cell Phones

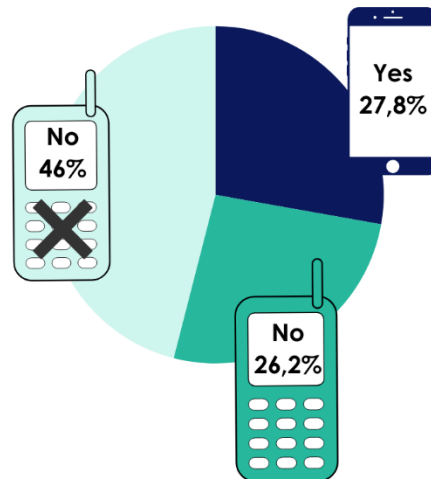
Do you have a cell phone?

N = 1258



Is your cell phone a smartphone?

N = 676



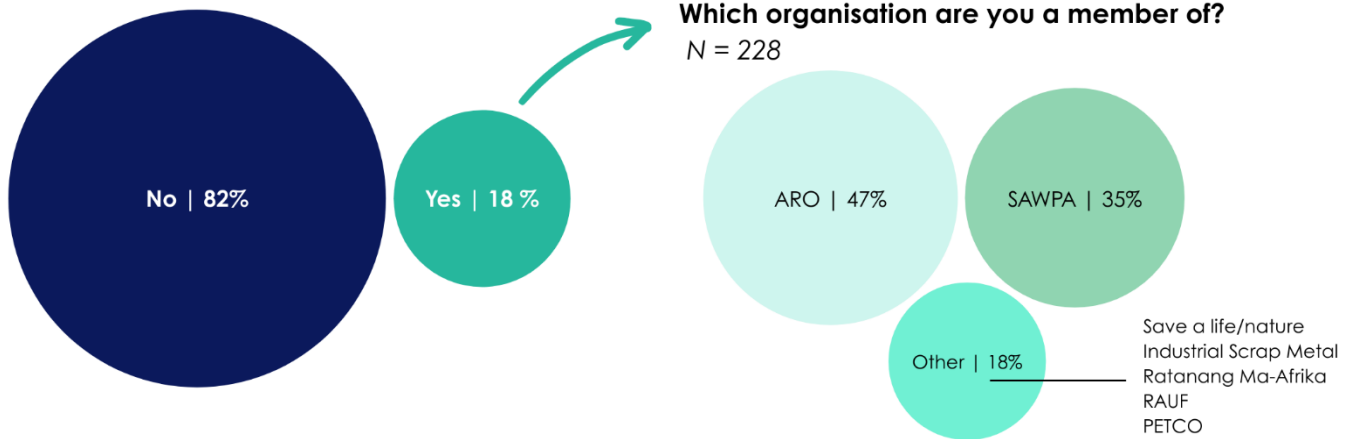
3.2.6.2 Waste reclaimer organisations

QUESTIONS 34 - 35

Figure 17: Membership to Waste Reclaimer Organisations

Are you a member of a waste reclaimer organisation?

N = 1255



3.2.6.3 Are you registered on the national waste picker's database: South Africa Waste Picker Registration System (SAWPRS)?

QUESTION 36 | N = 1258

Figure 18: Registration on SAWPRS



Summary of General Information

- 54% of respondents have a cell phone.
- Just over 27% have a smartphone.
- 82% of respondents are **not** members of a waste reclaimer organisation.
- Of the 18% who are members, 47% are members of ARO, 35% are members of SAWPA, and 18% are members of other organisations.
- Only 14% of respondents are registered on SAWPRS, which means that the majority (86%) are not yet registered.

4.0 Buy Back Centres

4.1 Survey of Buy-Back Centres

BBCs' core business is trading, and are dependent on commodity markets. A total of 31 BBC surveys were completed, covering all nine provinces in South Africa. It is evident that BBCs use various sources to buy material, including those from the formal and informal economy. BBCs most commonly buy recyclable materials from street waste reclaimers (93%) (who is also the group who serve as their main source of income) and neighbourhood waste reclaimers (79%), followed by private businesses (76%). Besides these, the surveyed BBCs also collect materials from various sources including private businesses (71%), shopping malls (59%), schools (57%), households (48%) and other places.

BBCs buy a variety of material types. 90% of the surveyed BBCs buy aluminium (the most bought material), followed by K4 cardboard and white paper (86% respectively). More than half of the BBCs also buy clear/light tinted PET (79%), HDPE (76%), PP (69%), LDPE (59%), steel (59%), coloured PET (55%) and non-returnable glass (52%). On average, BBCs pay the most for electrical or electronic waste (ZAR 30.82 per kg) and the least for steel (ZAR 0.57 per kg) (if 'Other' as a category is not considered). BBCs sell to a variety of buyers, including other BBCs or aggregators, recyclers or processors, exporters and other types of buyers. The surveyed BBCs reported cardboard as the most sold material at 126,12 tons (based on the previous month's income).

Regarding the effects of the implementation a DRS, over 70% of respondents agreed that it would critically (62.6%) or severely (10.1%) impact on their business. The most common concerns raised by respondents surrounding the implementation of a DRS related to buyback centres (30%), followed by the livelihoods and safety of waste reclaimers (13%). Detailed results to the survey are presented below.

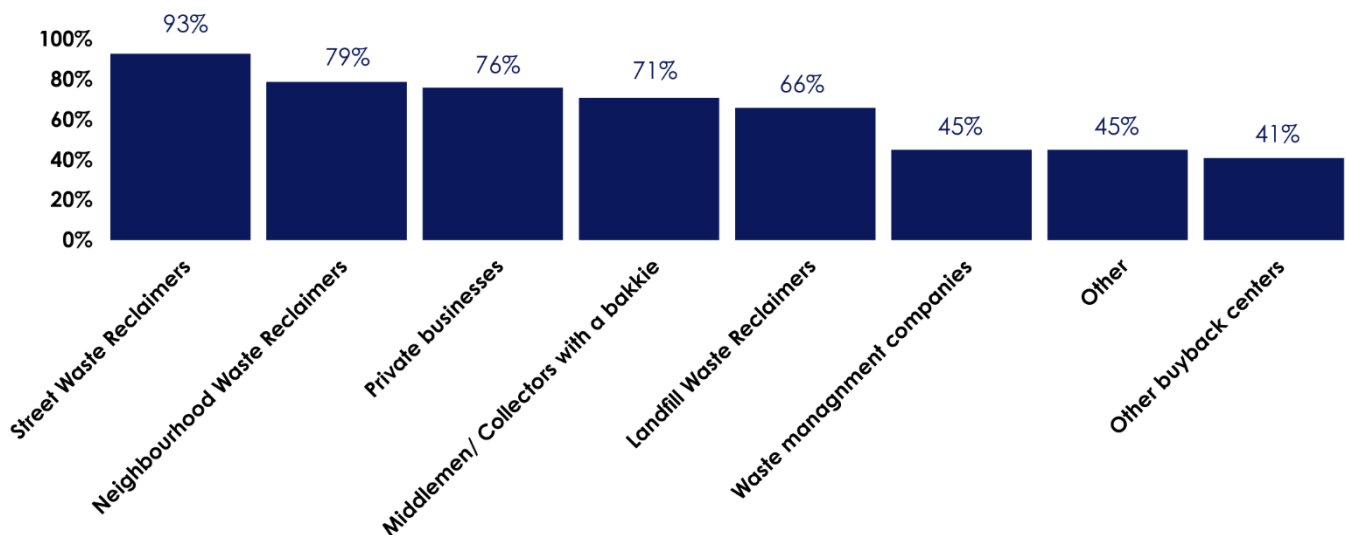
4.2 Detailed Survey Results

4.2.1 Sources of Recyclable Materials

4.2.1.1 From whom do you buy recyclables?

QUESTION 1 | N = 31

Figure 19: Sellers of Recyclable Materials to BBCs



4.2.1.2 Who of the above is your main source?

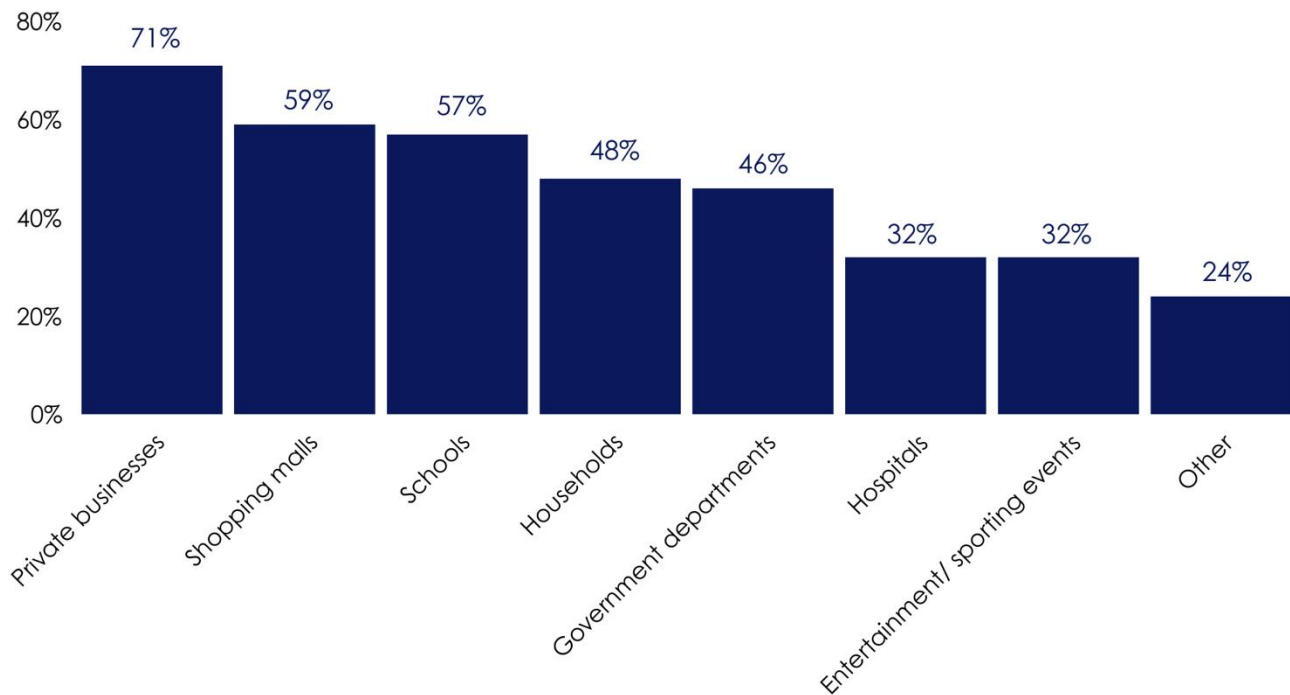
QUESTION 2 | N = 26



4.2.1.3 Where do you collect recyclables from?

QUESTION 3 | N = 31

Figure 20: Spaces where Recyclables are Collected by BBCs



Summary of Sources of Recyclable Materials

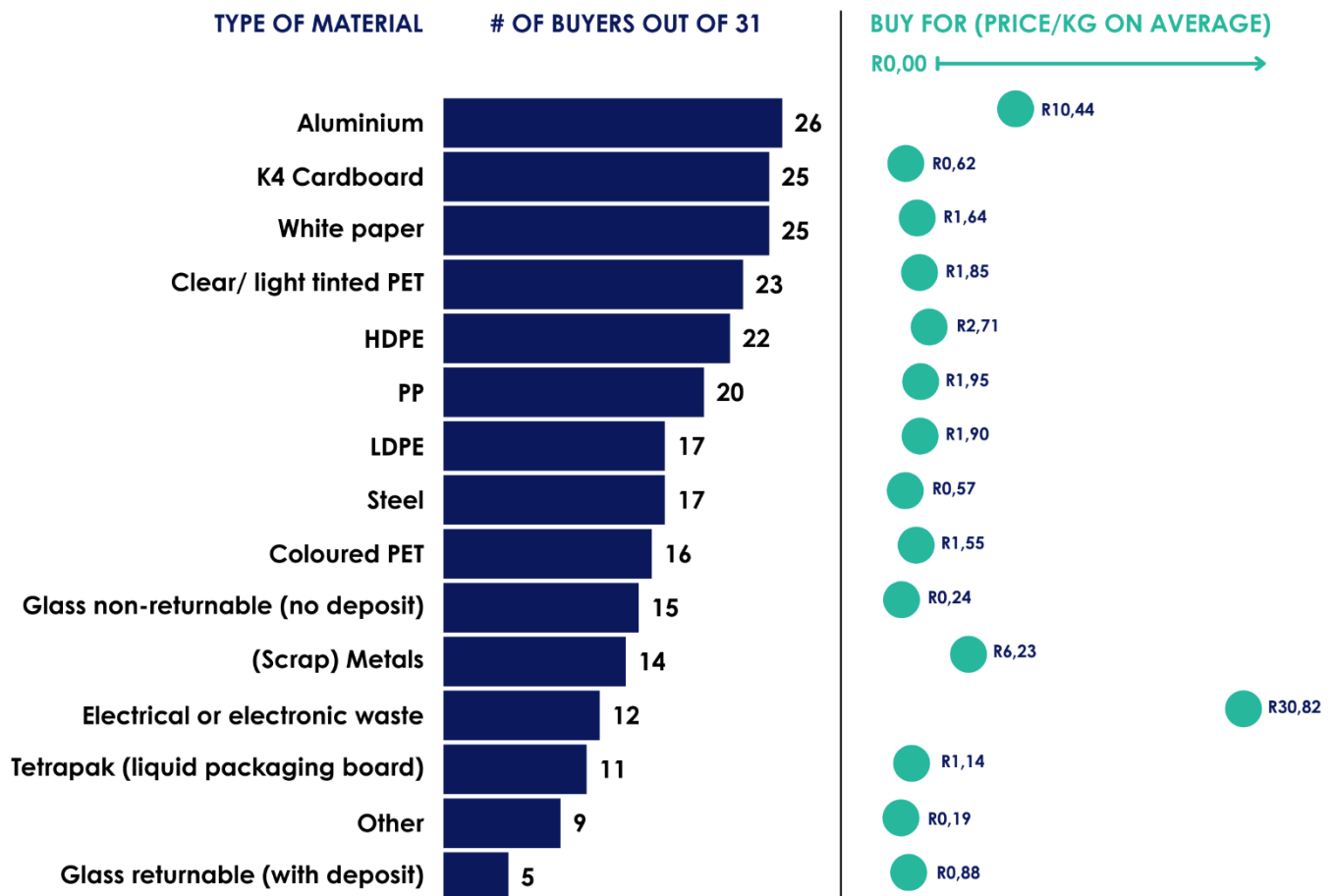
- BBCs most commonly buy recyclable materials from street waste reclaimers (93%) followed by neighbourhood/ township waste reclaimers (79%).
- Materials bought from street waste reclaimers are their main source of income, followed by materials bought from landfill waste reclaimers, and then private businesses.
- BBCs collect most frequently from private businesses (71%), followed by shopping malls (59%), schools (57%), households (48%) and government departments (46%). 32% respectively also collect from hospitals and entertainment or sporting events.

4.2.2 Pricing of Recyclables and Income Patterns

4.2.2.1 Which recyclables do you buy and what is the price you paid per kilogram the last week?

QUESTION 4 | N = 31

Figure 21: Recyclables Bought by BBCs and Their Prices



4.2.2.2 Which products for you make the most money from?

QUESTION 14 | N = 31

MOST PROFITABLE	2 nd MOST PROFITABLE	3 RD MOST PROFITABLE
<ul style="list-style-type: none"> White paper K4 Steel PET & LDPE Aluminium (UBC), Glass, HD, HDPE, Metal, paper, Re-grinds e.g. PP HP, scrap steel, steel and cans, 	<ul style="list-style-type: none"> PET Cardboard & White paper Aluminium, HDPE, K4 Cans. Glass, K4/HC1, LDPE, Plastic = LD, PP, subgrade, subgrade & aluminium 	<ul style="list-style-type: none"> PET Aluminium, glass & K4 Tetra, Alu can, Blikkies [fins], Cardboard, HD, HDPE – Both, LDPE, paper, Plastic -LD mix and clear, Steel, White paper

4.2.2.3 Of which products do you get the most of in weight?

QUESTION 15 | N = 30

MOST IN WEIGHT	2 ND MOST IN WEIGHT	3 RD MOST IN WEIGHT
<ul style="list-style-type: none"> Cardboard (K4) Steel Glass Cardboard, LDPE, Metal K4 Cardboard, K4/ white paper, PET, & Plastic -LD mix and clear 	<ul style="list-style-type: none"> Cardboard (K4) Cardboard, LDPE, PET & subgrade Alu scrap, Alu -UBC, Glass, HL1-White, Metals, Papier, PDPE, Plastic, Plastic soft-LD, PP, Steel, & White paper 	<ul style="list-style-type: none"> PET White paper Glass LDPE, Alu Cans, Aluminium, Electronic waste, HD & PP, HD white, HDPE, Paper - HL1 & 2 & CMW, Pipes, Plastic- all LD and HD & UBC

4.2.2.4 Regarding price trends, which materials' prices have changed significantly over the past year?

QUESTION 5



1

Cardboard/ K4

N = 15/31

- Oversupply
- Mills overstock. SA do not export anymore. Can only send one truck per month
- K4 down
- Cardboard down severely
- K4 mills overstocked no export mills maintenance
- Cardboard not moving since it has been 48c.

- All prices have gone down, no-one wants boxes. Mpact - machines on quota of about 350 tons per month. Market is flooded.
 - K4 also went down severely with about
 - ZAR 1.30 per kg
 - PET & K4 went down really bad in the past 12 months, pricing has still not been received for these 2 items
 - K4 went down, everything went down. K4 and PET went down severely. K4 quotas are getting better.
 - K4 & PET & white paper went down dramatically
 - PET, K4 CD mix down very sad. PET from ZAR 8.40 to ZAR 3.20. Everything went down, White paper stayed constant
 - K4 cardboard has no supply, taking up storage space.
-



2

PET

N = 17/31

- PET dropped half; prices fluctuate a lot
 - PET down severely-so bad that we had to stop buying it
 - PET severely down
 - PET severely down
 - PET prices halved a year ago - export ban.
 - PET changed, price decreased from high to low.
 - prices go down PET in Dec, to ZAR 2.50. In winter price is higher ZAR 3.50; even ZAR 4 last year and really came down.
 - PET at least now ZAR 1,50 but use to be 90c so better now.
 - market manipulation takes place, there is a monopoly on certain materials e.g. PET, so few buyers, price dropped to a rock bottom low and almost not worth doing. This time of year prices are down.
 - PET & K4 went down really bad in the past 12 months, pricing has still not been received for these 2 items
 - PET market is flooded, only buy from certain people. Don't buy from new recyclers
 - Everything is down. PET went down the worst of all.
 - K4 went down. Everything went down. K4 and PET went down severely. K4 quotas are getting better. PET quotas still bad.
 - K4 & PET & white paper went down dramatically
 - PET, K4 CD mix down very sad, PET from ZAR 8.40 to ZAR 3.20. Everything went down, White paper stayed constant
 - PET - fell a lot 50% has to do with load shedding (cannot process) plus internationally there is no market. ZAR 9 down to ZAR 5 per kg over 7 months. Price should rise next year there is competition for example (Zibos)
 - Price of PET and K4 went down severely in the past year.
-



3

Tetrapak

N = 2/31

- *Went up due to EPR*
- *Tetrapak - nowhere to sell so don't collect*

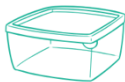


4

Glass

N = 2/31

- *Oversupply*
- *Glass = steady*



5

PP

N = 2/31

- *Prices fluctuates a lot*
- *Went down a bit*



6

PVC

N = 2/31

- *Constant*



7

Steel

N = 4/31

- *Steel prices have hiked the past year;*
- *Steel hasn't gone down as much as expected due to ban, short steel (cost involved in cutting); if less than 1m - get a better price, easier to feed into furnaces*
- *Steel impacts prices, high volume and price just went down by ZAR 1.50*



8

HDPE

N = 1/31

- *HDPE various requirements regarding colours*



9

Aluminium

N = 2/31

- *Aluminium and electrical prices has dropped significantly over last year*
- *Aluminium cans - relatively steady, same for 6 months*



10

E-Waste

N = 2/31

- *Aluminium and electrical prices have dropped significantly over last year*



11

White paper

N = 2/31

- *K4 & PET & white paper went down dramatically*
- *White paper stayed constant*

Note that the answers provided by respondents vary and may seem contradictory. These variations are likely influenced by region-specific and interprovincial differences regarding demand for different types of materials.

4.2.2.5 Are there any materials that you stockpile before selling?

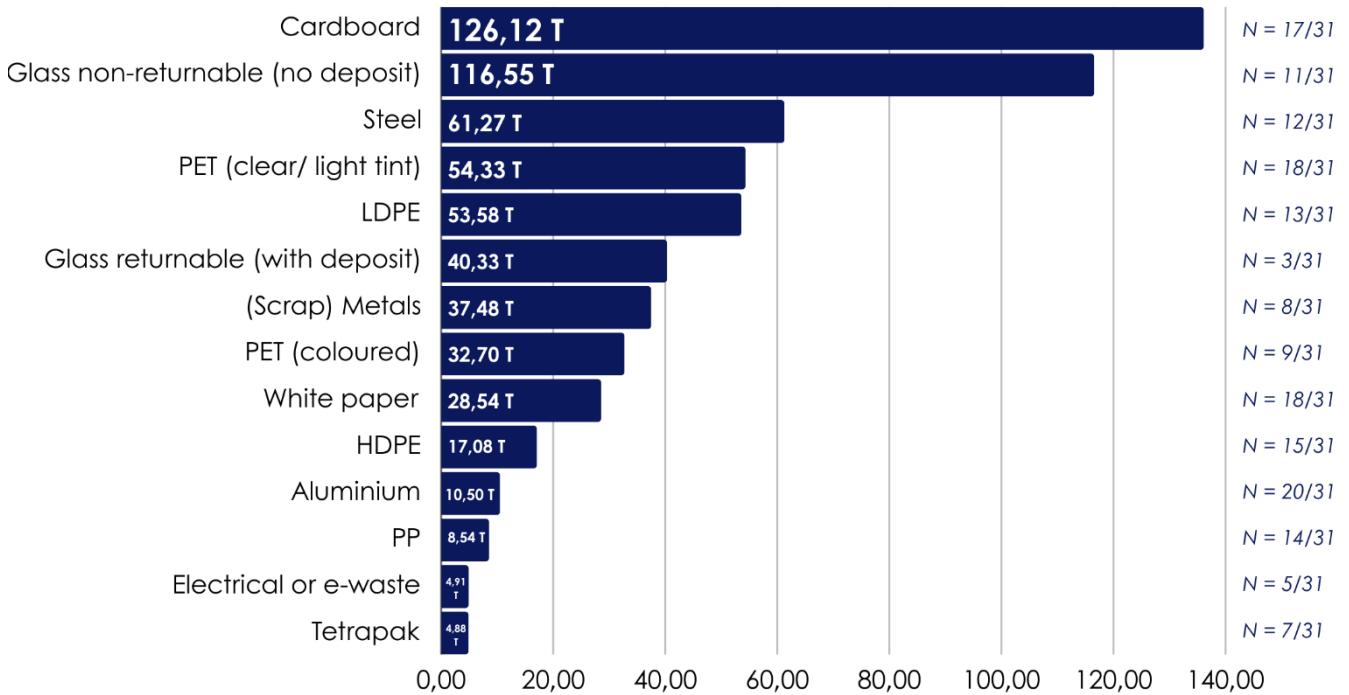
QUESTION 16 | N = 31

<p style="text-align: center;">YES, ALL MATERIALS</p> <p style="text-align: center;">Most respondents stockpile all products until there are enough to sell</p> <ul style="list-style-type: none"> • All products until there is enough to sell (Translated) • Tetrapak and everything must make a truck load full before I can sell make transport feasible • Need to make a lorry [truck] full before I can sell it, so yes, all the materials • Everythingx2 • All, keep them for a month and then sell but space is limited • Yes to make transport full • All materials, need to make a truck full, before it can be transported and sold to the relevant client x3 • Not because we want to but because we are on quota. Can only deliver x-amount of PET and cardboard. 	<p style="text-align: center;">YES, PET</p> <p style="text-align: center;">PET was the product that was singled out most</p> <ul style="list-style-type: none"> • PET prices are fluctuating very fast. If the prices are good then you sell • PET - stockpile and bale at College (transport themselves) • PET that is baled - wait till stock and sell at better price to quantity plastic lids, glass • PET, K4 • You must fill up a tank to make up a lift for transport. PET quotas as well as Tetrapak will then need to stockpile • PET runs very fast and is good for cash flow
<p style="text-align: center;">YES, OTHER</p> <ul style="list-style-type: none"> • UBC, HD and PP - takes time to make a load. • Only Alu-UBC - but only a week not long-term stockpiles • HDPE have to build up enough. • Only e-waste, make a truck full of glass before they sell it • Steel cans, struggle to sell them 	<p style="text-align: center;">NO STOCKPILING</p> <ul style="list-style-type: none"> • She is too small - Don't stockpile • No • No stockpiles

4.2.2.6 How much of the following recyclables did you sell last month?

QUESTION 6

Figure 22: Tonnages for Recyclable Materials Sold by BBCs



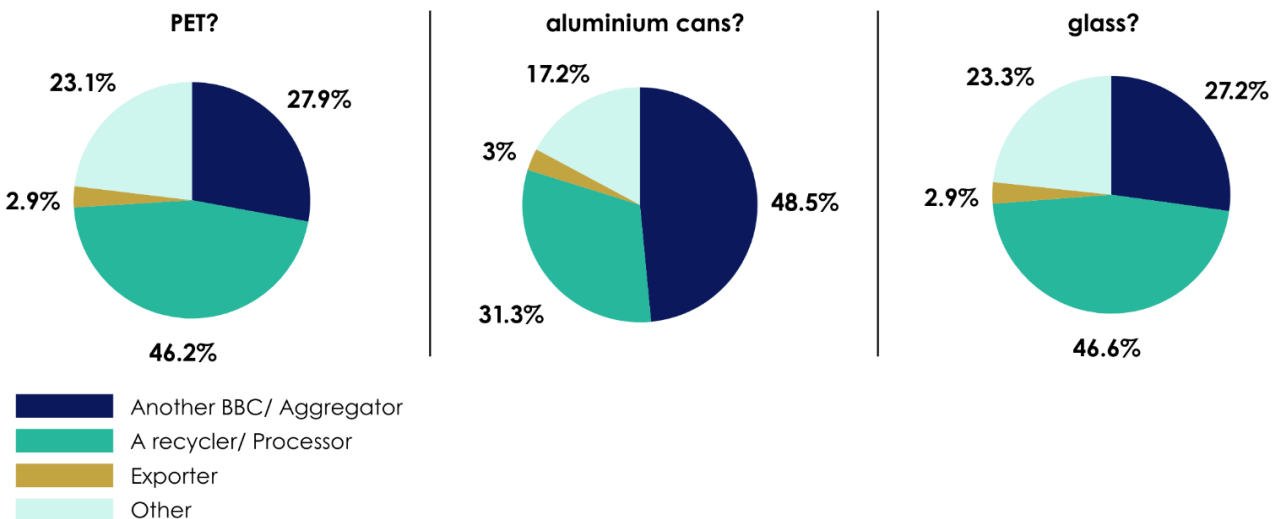
Note that not all respondents sell materials. “N = X/31” next to each material indicates how many respondents’ answers make up the average tonnages for that specific material.

4.2.2.7 Who are your buyers?

QUESTIONS 7 - 9 | N = 31

Figure 23: Entities that Buy from BBCs

To whom do you sell your....



4.2.3 The Impact of a DRS

4.2.3.1 Would the implementation of a DRS affect your business? Why or why not?

QUESTION 11 | N = 31



No or positive effect

- **Won't affect** us that much. I just think there will be less waste lying around.
- It **will not affect** the business. It will be better
- Yes, it will **positively affect** our business as we already deal with refundable bottles and aggregate it, pay a deposit to the client and take it back to Distell and SAQ. This will increase our volumes.
- People are lazy and I do not think that the volume to the BBC will decrease. **No negative impact** on BBC or on a waste picker.
- People are very lazy and it is **not a big enough incentive** that people will not throw it away. The material will still end up at the Buyback Centre
- It is a **good idea**, people won't throw it away, better for the environment. E.g. glass bottles used to all be returnable.
- Yes, people wouldn't bring cans but **won't close business, just dent it**
- Fine, it **won't be a problem**.
- **Good**, help BBC's and street people and give jobs to.
- No, there is **enough waste**. Even the returnable glass count as bottles which are returnable, still ends up at the BBC. Plastic refundable as well.
- It will **not affect business**. Hopefully, it will make it better.



Negative effect

- PET volumes will be non-existent. Glass will be negatively affected. Tins also. How are they going to transport PET? Pickers will **definitely be negatively affected**.
- Would **negatively affect** me, unless I can pay the deposit to the worker picker and make a margin on the deposit. If not, I will be cut out of the value chain.
- It will not be possible to have DRS, **will affect us**. Retailers might get own baling machines. Retailers will buy own baling machines instead of giving it to BBC as Spar is doing.
- **Bad** effect - rely on prices and tonnages, base kg. Reverse vending machine - if it is a BBC who owns material side?
- Wouldn't just affect business but would **affect the whole industry**. Beverage containers are the biggest volumes in the industry. If it goes straight to the shop the recycler/ BBC is cut out. Would become an additional business for the retailer /shop. Whole system would collapse. Would destroy pickers income. Won't change behaviour - those are already disposing of beer bottles, will do the same with al DRS containers. Prices are too low so not worth it, need to push S@S.
- Would **have an effect, badly**. The big guys will take the work. Must be set up to give the smaller guys a chance. Localised recyclers prioritised
- Wouldn't be able to support waste pickers, it would **affect business and staff**. There would

- *be an increase in crime and wouldn't be able to feed families.*
- **Badly**, because we won't be making money.
- Will **affect business badly**.
- Yes, will **severely impact** my business as volumes will decrease unless the shops will bring it to BBC.
- Yes it will, the product will not be coming to us anymore as the bags will be sent directly to the processors with severe logistics and we will lose out. **Big impact** on the waste picker.
- Yes it will, I will lose volumes and these will **impact the income I make**. This will impact on street and landfill picking. My own BBC will also loose jobs - bigger unemployment. We provide a lot of jobs without us a lot of unemployment. **System not suitable for a third world country**.
- It will **affect businesses**, especially waste pickers, as most don't have IDs as they live on the street.

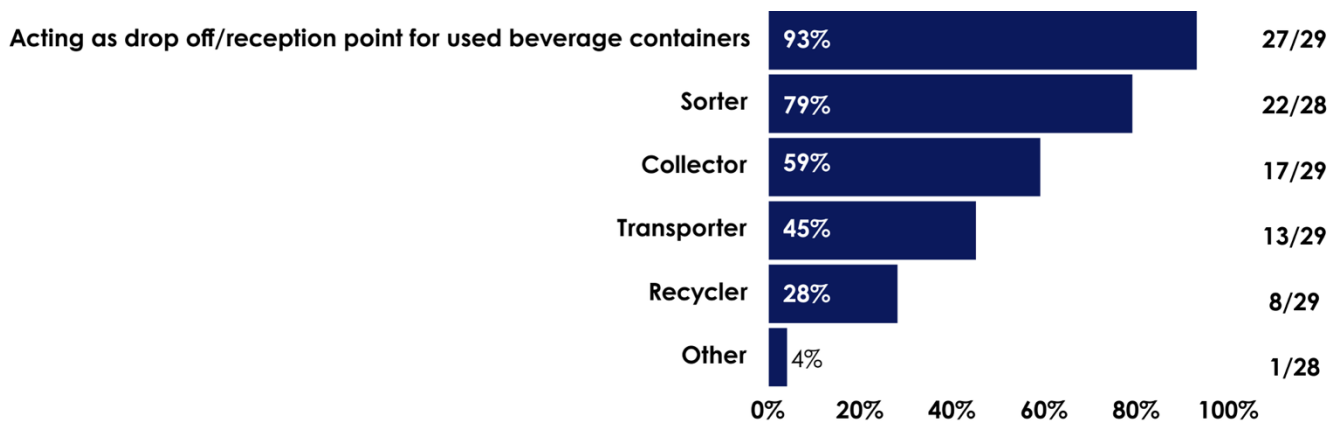
Some Respondents were Unsure

- *It depends on how buyers get right contacts and information for deposits. People will come on board if there is help with storage.*
- *No clue bigger companies should answer*

4.2.3.2 What role do you see yourself fulfil in a DRS?

QUESTION 12 | N = 31

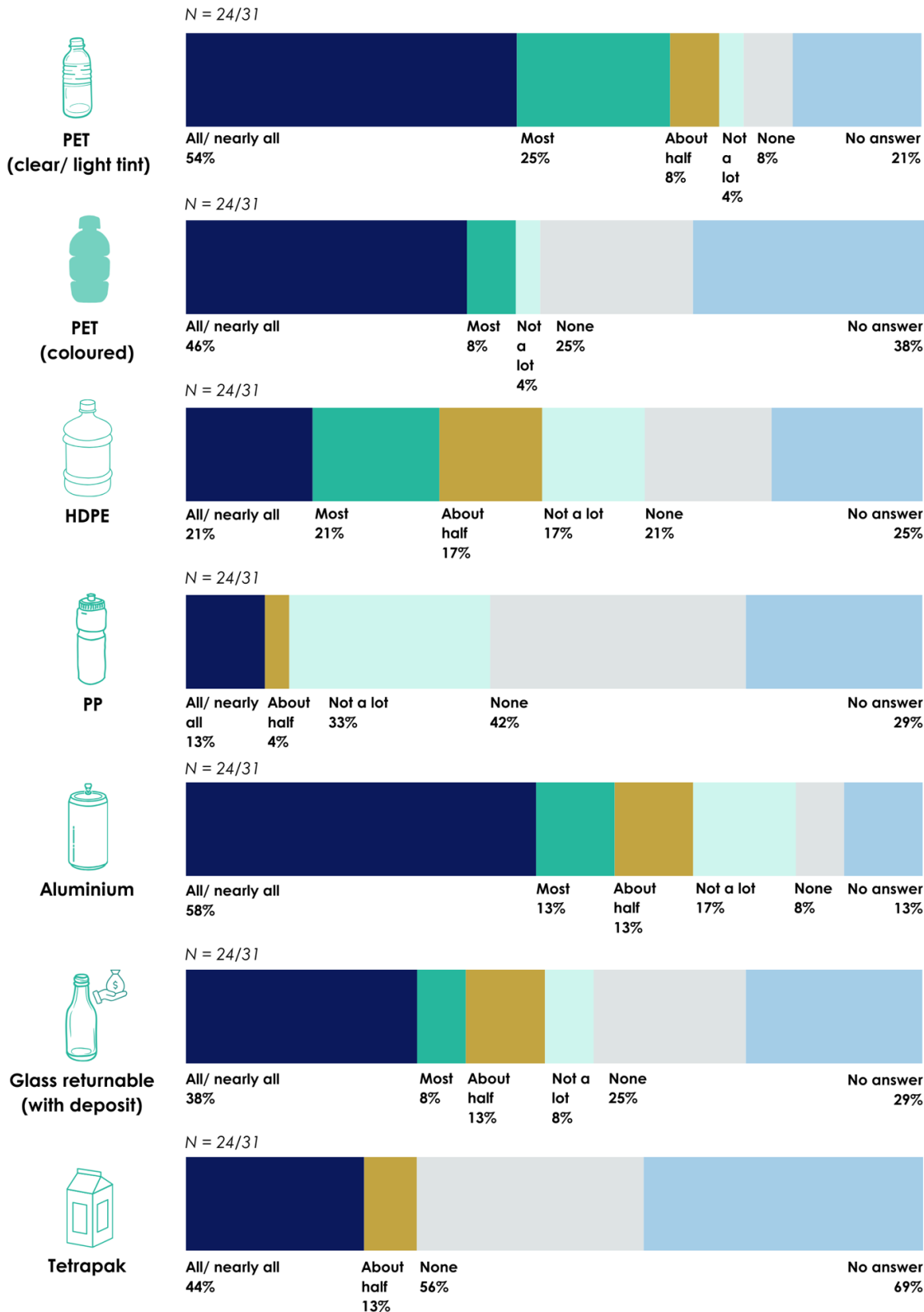
Figure 24: Roles BBCs See Themselves as Fulfilling in a DRS



4.2.3.3 Estimate what proportion of each waste stream you buy in is beverage containers.

QUESTION 10

Figure 25: Proportion of Income from Various Beverage Containers



4.2.3.4 If beverage containers (like aluminium cans and PET bottles) are no longer part of your inventory, what would the effect be on your business?

QUESTION 13 | N = 31

Figure 26: Effect on BBCs if Beverage Containers Are No Longer Part of Inventory

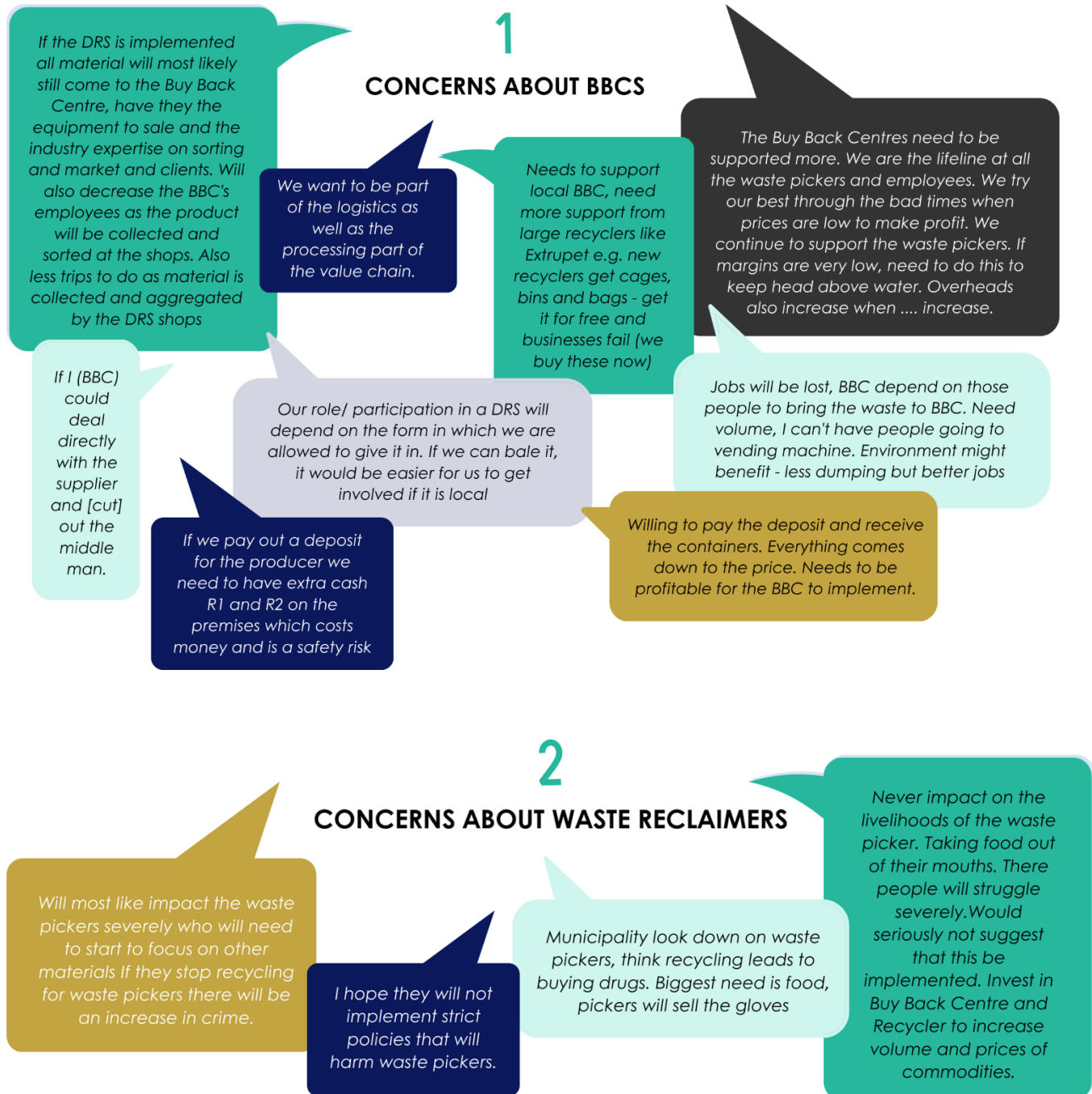


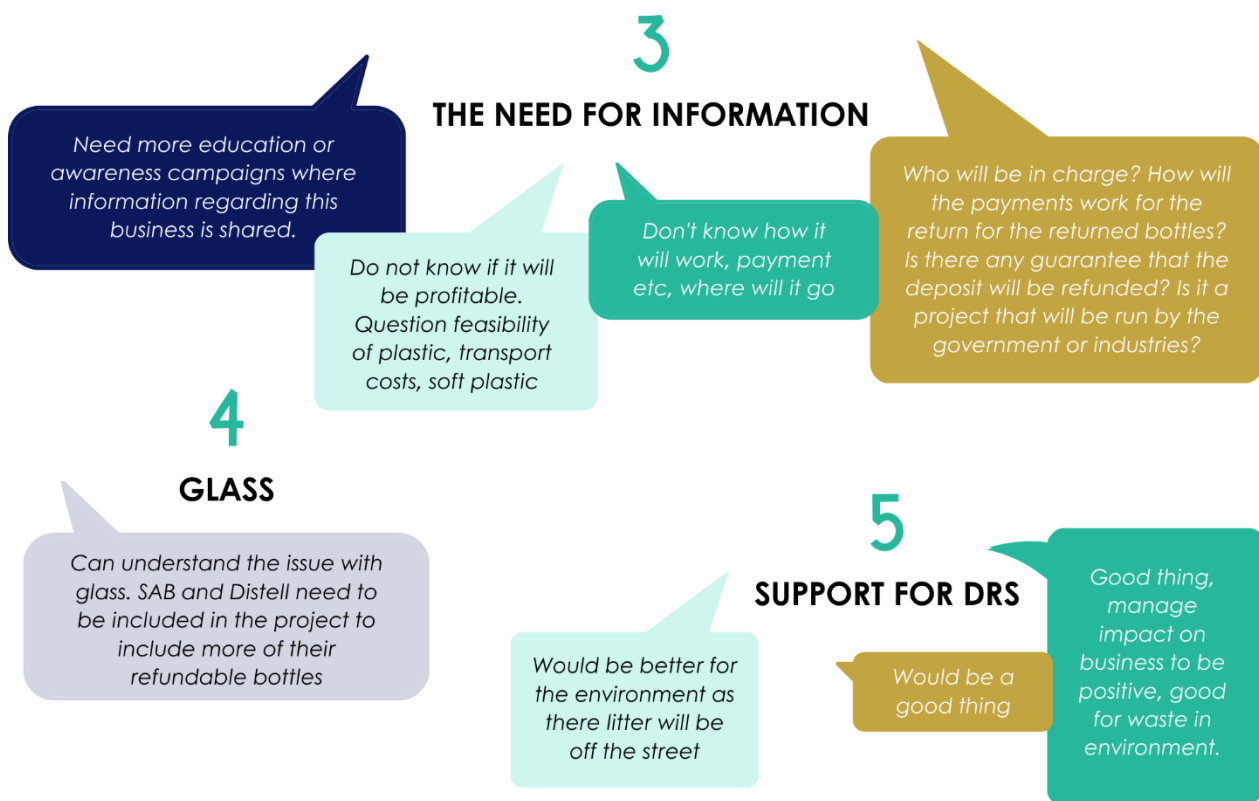
Summary of Impact of DRS

- No respondent indicated that it would have no impact at all, meaning that all respondents feel that their business will be affected, albeit positively or negatively.
- Over 70% of respondents agreed that it would have a critical or severe negative impact on their business, especially if they are to be excluded from the system.

4.2.3.5 As a BBC, do you have any other thoughts you would like to share about the possible implementation of a deposit return scheme or take-back system for beverage containers in South Africa?

QUESTION 17 | N = 31





Summary of Open Discussion on DRS






- The most common concerns raised by respondents related to buyback centres, followed by the livelihoods and safety of waste reclaimers.
- 4/31 respondents expressed that they require more information about DRS before forming an opinion about it.
- 1/31 respondent commented on the applicability of DRS on the problem of glass recycling.
- 3/31 respondents expressed their support for DRS.








5.0 Waste Reclaimer Design Workshops

Workshops for waste reclaimers were organised by UWC and Eunomia in February 2024 at three locations in South Africa – Johannesburg, Bloemfontein, and Cape Town. These workshops were conducted to facilitate a comprehensive dialogue about a potential DRS and its potential benefits for South Africa. The workshops aimed to communicate initial ideas and opportunities, ensuring they are not dismissed prematurely, and provided a platform for waste reclaimers to share their insights on what aspects of DRS could work for them. The workshops were attended by 16 waste reclaimers from ARO and 14 from SAWPA.

The feedback received from waste reclaimers feeds into the system design. There was a range of views on different aspects of the system along with comments on the inferences from survey responses. These are summarised under themes as can be seen below (Table 1).

Table 1: Summary of Waste Reclaimers' Comments during Design Workshop

Theme	Waste Reclaimers' Comments
 <p>Survey results</p>	<ul style="list-style-type: none"> • Material prices presented are mostly accurate. • Monthly incomes are typically higher than shown: ZAR 5,000 per month to ZAR 10,000 per month in Bloemfontein, and ZAR 6,000-7,000 in Johannesburg.
 <p>Deposit value</p>	<ul style="list-style-type: none"> • A fixed deposit value per container is appreciated. • Agreement that containers would be worth more with the proposed deposit value than they are currently worth from BBCs.
 <p>Return points</p>	<ul style="list-style-type: none"> • Spazas do not pay the entire deposit in existing voluntary DRS for refillable bottles. • Would prefer if shebeens were included as a return point in a DRS as they do pay the entire deposit under existing voluntary DRS for refillable bottles. • BBCs may pay someone to collect recyclables on a daily wage instead of paying service fee to waste reclaimers, creating competition. • Return locations should be focal points to ensure greater coverage. • The proposed DRS should have many return points, reducing the need for baling and other equipment.
 <p>Material coverage</p>	<ul style="list-style-type: none"> • All in-scope container materials of all in-scope sizes should bear the same (fixed) deposit value.
 <p>Fees and payment</p>	<ul style="list-style-type: none"> • Appreciate that it would be easier, simpler, and faster to earn money in the proposed DRS.

Theme	Waste Reclaimers' Comments
 <p>Payment methods</p>	<ul style="list-style-type: none"> • Need for a flexible payment method. • Appreciate that payment could be done via a smartphone app because carrying cash presents a risk. • Access to smartphones is limited, especially while working outside. • Not all waste reclaimers can afford smartphones. An “Unstructured Supplementary Service Data” (USSD) code service would be preferred. • Online payment may work only for bulk payments, but for paying ZAR 1 or ZAR 2 deposit, cash would be preferred.
 <p>Registration</p>	<ul style="list-style-type: none"> • Would want the DRS to provide benefits to registered waste reclaimers. • Recognition and security are important, especially protection in case of injury.
 <p>Barcodes</p>	<ul style="list-style-type: none"> • Barcode/label ink should not scrape off/remove easily. This should be ensured by industry.
 <p>Access to materials</p>	<ul style="list-style-type: none"> • Waste reclaimers do not have access to landfill waste in Western Cape. • Need to ask households to separate containers for waste reclaimers.
 <p>Fairness</p>	<ul style="list-style-type: none"> • Proposed DRS 'must' be mandatory, otherwise it will not be as effective due to free-riders. • Fraudulent products could find their way into a DRS. There should be a clear way of knowing whether a container carries a deposit, possibly through a smartphone app.
 <p>Education/ Awareness</p>	<ul style="list-style-type: none"> • Lack of knowledge of how a DRS works can make the communities disinterested. • Need mentorship/ guidance for waste reclaimers to adjust to the system. • Need for households to care for proper waste disposal and be involved. Waste reclaimers can help communicating the message through their awareness programs.
 <p>Logistics/ Space</p>	<ul style="list-style-type: none"> • There is lack of space to sort and store recyclables. • Need for a platform to raise funds for helping movement of recyclables.

Waste reclaimers presented diverse perspectives about a DRS in South Africa. While some aspired to progress beyond their current roles, aiming to acquire equipment and eventually become intermediaries or establish BBCs, certain landfill waste reclaimers expressed a preference for continuing their waste collection activities within the existing system. Geographically, Cape Town predominantly hosts street and

neighbourhood waste reclaimers due to restricted landfill access, while Bloemfontein has a higher number of landfill waste reclaimers. Additionally, waste reclaimers in Cape Town demonstrated enthusiasm for the proposed DRS, whereas it is reasonable to state that in Johannesburg the general view was not positive and showed scepticism particularly on the proposed “separate collection” method of returns.

6.0 Conclusion

This report provided an overview of the results from a survey conducted between 10 October and 20 November 2023, involved surveying 1,259 waste reclaimers and 31 BBCs across 25 towns and cities in all nine South African provinces. The results in the report inform the data for the development of a possible mandatory DRS for South Africa. It is important to note that both the waste reclaimers and the BBCs have limited knowledge of a DRS and their comments should be viewed in this light.

The findings highlight the critical role of waste reclaimers in the recycling landscape, collecting a wide range of materials, including high-value aluminium (88%), PET (78%), and HDPE (73%). Most waste reclaimers operate as street waste reclaimers (63%), with most preferring to work alone. Despite their essential contribution to recycling, reclaimers face numerous challenges, including low income and lack of organisational support (82% are not members of any waste reclaimer organisation). Additionally, 71% of reclaimers sell directly to BBCs, while others sell to independent buyers or through alternative channels. The introduction of a DRS in the country poses significant concerns for waste reclaimers, with fears of exclusion and negative impacts on their livelihoods and safety.

BBCs primarily source recyclable materials from street waste reclaimers (93%) and neighbourhood waste reclaimers (79%), and they handle a diverse range of materials, with aluminium being the most bought (90%). BBCs expressed apprehension about the implementation of a DRS, with over 70% believing it would critically or severely impact their business operations, particularly if they are excluded from the system. Concerns centred around the potential disruption to their material supply chains and the economic viability of their businesses. While some BBCs expressed support for the DRS, the majority indicated a need for more information to fully understand its implications.

Overall, the study underscores the necessity for a well-informed and inclusive approach to implementing a DRS, addressing the concerns of both waste reclaimers and BBCs to ensure a sustainable and equitable recycling system in South Africa.

