

# Permanent Display & Fixtures Recycling Report

*Prepared by POPAI UK & Ireland*



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## Foreword

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As the sustainability agenda continues to shape strategy in the retail industry, we must keep a laser focus on every aspect of the supply chain. On keeping carbon emissions low, exploring the best materials to use for packaging and P-O-P and recognising the range of ways to dispose of these in a planet-friendly fashion.

POPAI continues to champion sustainability initiatives across the board. Our pioneering 2022 Sustainability Summit saw leading brands and retailers discuss case studies on a wide range of environmental issues, from design through to end-of-life, along with expert panels and product and material demonstrations.

The Sustainability Standard from POPAI offers accreditation for organisations demonstrating sound environmental principles, boosting competitive advantage and business credentials. And EcoSupport offers a range of advice and support for brands and retailers as well as the latest insights and engagement with like-minded professionals. Through

the Sustain<sup>®</sup> tool, members can measure the environmental impacts of display and other projects, with recommendations for how to improve their overall sustainability, reduce carbon footprint and improve recycled content and recyclability.

Which brings me on to the content of this, our latest report. Here, we build on our findings into the recycling of temporary display and packaging, widening our focus to permanent display and fixtures. What are brands, retailers and suppliers doing in this field to offer improvements, how are they communicating with each other and what really happens to display and fixtures when they ultimately reach the end of their life?

It's a hugely interesting and diverse topic, and one which is only likely to gather more traction in the coming years.

I would like to thank our sponsors HH Global, Momentum Instore Aftermarket, TAG, RTC and Mars Wrigley for helping us make this possible and we look forward to providing further initiatives in the future.

**Martin Kingdon**

Insights & Sustainability Director

*POPAI UK & Ireland*

## Introduction

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As the importance of sustainability across our supply chains becomes ever clearer, how is the retail industry stepping up? In this report, we take a deep dive into the specific world of permanent display and store fixtures, to complement our previous similar research into temporary display.

As permanent P-O-P display is often constructed of the same or similar materials used to build

store fixtures, our research covered both equipment types, exploring how manufacturers design for recyclability for both, and how retailers deal with each from a recycling perspective.

To gather data for this report, POPAI spoke with a range of stakeholders from across the industry to gauge their views and opinions, as well as to gather

statistics and facts about attitudes and approaches to recycling.

We also highlight the importance of the design stage in considering the end-of-life of a display or fixture, however far in the future this may be. Although we focus our attention in this report on recycling, this is with the understanding that there are other considerations to adopt first, such as reuse and repair.



## Research methodology



Our research focused primarily on permanent retail P-O-P display, which is typically made from materials such as metal, plastics and wood. The study also incorporated store fixtures such as unbranded retailer-owned equipment, again typically made from metal and wood.

It encompassed a broad range of retail and product categories including grocery, convenience, health and beauty, pet, sport, consumer electronics and telecoms.

Research took several forms. However, in the main it was based on interviews with key stakeholders at brands, retailers and P-O-P agencies and suppliers.

As well as recycling and related topics, our interviews explored other correlated issues, such as wider views on sustainability.

Additionally, we conducted desk research to understand how practices are influenced by the recycling infrastructure in the UK and Ireland, and how these facilities, or lack thereof, impact on recycling of permanent display and fixture materials.

### Specific objectives of the research included:

- Establishing the reality versus perception of recycling permanent display and fixtures from the back of stores, shopping malls and regional distribution centres across the UK and Ireland.
- Understanding the prevalence of collection, reuse and/or refurbishment.
- Gathering insights into any barriers to reuse, recycling or recyclability of permanent display and fixtures, and understanding why they exist.
- Establishing a transparent lifecycle view of in-store marketing from design and manufacture to installation and end-of-life.
- Highlighting the opportunities to increase recycling or reuse and decrease landfill rates.
- Making recommendations on initial design requirements to enhance and increase the sustainability credentials of in-store marketing, use of sustainable materials, recyclability, and reuse and end-of-life opportunities.
- Collating the findings of the permanent display study with those from the temporary display recycling study for publication in a follow-on report.

*The opinions and views expressed in this research have been collated from a range of third-party organisations and are not necessarily those held by POPAI.*

## Sponsors

POPAI UK & Ireland are very grateful to the sponsors of this report, without whom it could not have been conducted.



## Contributors

POPAI UK & Ireland would like to thank the following companies for their contributions to this report:



## Research topics



The research addressed a wide range of subjects, which included those common to brands, retailers and P-O-P suppliers, as well other issues which were specific to just one or two of the respondent categories.

Before we focused specifically on recycling, we wanted to get an understanding of how the broader sustainability agenda fitted into the cultures of those we spoke to. We did so by asking:

- Who within an organisation is responsible for sustainability and, specifically, recycling.
- We then followed this up by asking how important sustainability is to each company, in particular relating to permanent displays and store fixtures.
- Whether organisations had any sustainability guidelines for in-store marketing activity and if these extended to permanent displays and fixtures.
- Brands and retailers were asked if they included sustainability credentials in their tendering processes with display suppliers.
- Finally on this topic, we asked each of the three respondent groups if they felt that any of their customers or suppliers were particularly committed to sustainability.

Turning our attention to specifically to recycling we asked:

- Whether suppliers designed permanent display and fixture equipment with recycling in mind or if brands and retailers specified that they should. We then explored what these were.
- Allied to the above question we then asked if anyone had any formal recycling targets for the equipment we were investigating and if so, what they might be. Additionally enquires were also made about the measurement of the environmental impact of permanent displays.
- If display clients and users stipulated any particular recycling requirements and again what these looked like.
- If recycling provided a revenue stream for any of the organisations within the value chain.
- Whether anyone was aware of any regional variations affecting their ability to recycle materials.

In addition to recycling, other end of life options were investigated, specifically what the prevalence was for refurbishing, repairing, reusing and repurposing equipment. In the event that these processes were being used, we enquired about the practicalities of doing so and which organisations were employing them.

Materials and processes were also considered. The recyclability of display materials and their fixings was investigated together with the environmental impact of the process used to manufacture them. Other research regarding materials included:

- Which are the most commonly used and how recyclable are they perceived to be.
- If any display clients provided specific material requirements with regard to their recyclability and if any of them had restricted or even vetoed the use of certain materials.
- Whether anyone knew how much of the materials in the displays or fixtures they commissioned or produced was actually recyclable.
- We also looked at the use of electrical components in displays, asking how these were disposed of and if battery powered, what happened to these when no longer required.
- Where relevant we also enquired about the recycling and recyclability of chiller and freezer equipment.





Research topics continued

Next, we turned to the recycling of permanent displays at stores. Our research last year into the recycling of temporary materials at the back of stores revealed that most retailers have the ability to recycle paper based materials, we were keen to establish what the situation was regarding materials like plastic and metal, typically used for permanent displays. As we wanted to establish:

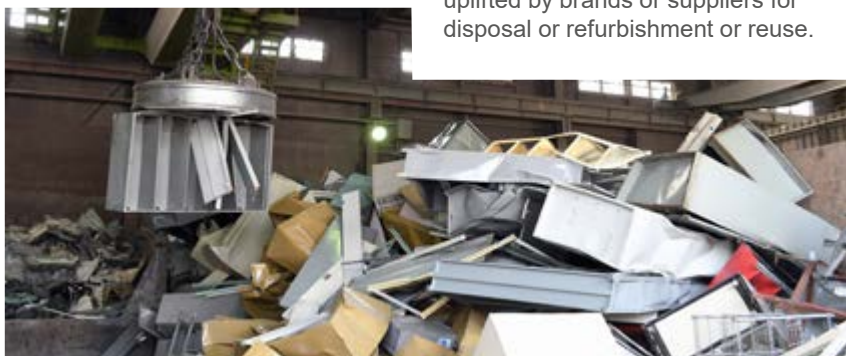
- Who at store level is responsible for recycling.
- If any stores were responsible for organising their own recycling arrangements.
- What retailer guidelines and training were in place to assist store staff with the disassembly of permanent display equipment.
- What facilities do retailers have for segregating permanent display materials and which materials have their own discrete recycling streams.
- If retailers record the amount and type of recyclable material collated at stores and/or depots, and whether they can identify how much of this is display related.
- What materials cannot be recycled, either due to the material type or lack of facilities, and what happens to these materials.
- We also asked all respondents if they thought any barriers to recycling existed and what could be done to overcome these and make recycling easier and more economically viable.



We then expanded the end of display life discussion to all respondents to explore the relationships and divisions of responsibility when it comes to disposing of permanent displays and store fixtures. Firstly, we asked brands, retailers and suppliers who they thought should be responsible for the disposal of this equipment at the end of its useful life. This was followed by asking how often permanent displays were uplifted by brands or suppliers for disposal or refurbishment or reuse.

To conclude we sought our respondents' views on a broader range of sustainability and environmental issues. These included what impact they thought COP26 would have on retail and the broader recycling scene and their thoughts and predictions on the future of sustainability in retail.

Finally, the research and findings from our visits to waste management and retailer recycling facilities was analysed, along with the insights gleaned from visits to independent convenience and pharmacy stores.





## Conclusions



The recycling and wider sustainability scene across all the brands, retailers and suppliers we surveyed is clearly very mixed. Organisations are at different stages of their respective sustainability journeys, have varying resources, and adopt their own methods and processes to encourage recycling of displays and fixtures. There are also a wide range of perceptions across the industry regarding recycling ability and efficiency.

All organisations are committed to improving their environmental credentials; however, this ethos has not always found its way into in-store marketing, particularly amongst retailers. Even where this is the case, brands and retailers are at different stages in their sustainability journeys in relation to displays meaning that P-O-P suppliers must be flexible in the way they approach sustainability discussions with their brand and retail clients.

The range of knowledge and understanding regarding materials and their ability to be recycled is very wide and not always accurate. It would appear there is a great deal of work to be done in this area to better educate those making or influencing material decisions on the sustainability credentials of their choices.

Store staff need considerably more training to deal with the recycling of permanent display than they would for dealing with temporary displays, which are made predominantly from card.

Likewise difficulties in disassembling displays and fixtures at recycling centres prevents otherwise perfectly recyclable materials from being recycled. Instead, many displays and fixtures go to landfill.

Our research also suggests there is less focus on recycling considerations for store fixtures. This largely because when many of the store fixtures in situ today were designed and installed, the organisations had either not

yet developed their sustainability agendas, or it had not filtered down to store fit out. Fortunately, most existing store fixtures are constructed predominately from metal and should be readily recyclable if they cannot be reused.

There are many areas which still need to be addressed to improve the recycling of permanent displays, such as more recycling facilities to cope with a wider range of recyclable materials, or collaboration between retailers to collate economically viable quantities of specific materials for recycling.

There is clearly a lot of focus and good intent when it comes to the recycling of permanent display and store fixtures. However, looking more closely at the details of how this is being addressed, it is evident some knowledge, processes and implementation are lagging behind compared with temporary display and packaging materials.

## Become a member today

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Access the full findings from this research and discover more about permanent display and fixture recycling in the UK & Ireland.

The full report is only available to POPAI UK & Ireland members.



Become a POPAI member. Visit [www.popai.co.uk/whyjoin](http://www.popai.co.uk/whyjoin) to sign up online.

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