

Temporary POSM & Packaging Recycling Report

Prepared by POPAI UK & Ireland



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Foreword



The way we view the environment has been changing dramatically in recent years. The impacts of global warming have been clearly visible, and awareness of the need to conserve finite resources has grown substantially.

As with all areas of society and business, the world of retail and display has a significant part to play in the global effort to reduce what we consume, and to better deal with the waste from the activities we engage in.

POPAI has been leading this effort since 2010, when we initially obtained government funding to initiate our sustainability programmes. We are now at a stage where it is imperative for all sectors of the industry to rethink their approach, and mandatory for all of us to take an active role in making change.

Over the past 18 months, POPAI has taken significant steps to assist the industry on this journey. Firstly, with Sustain® the eco-design indicator tool, then with the updated Sustainability Standard for companies. We then moved on to setting up the Sustainability Council, representing all sectors of the industry, to advise and guide on key issues as they arise, and finally we introduced the Sustainability Partnership to provide support and advice for brands and retailers.

We are at the beginning of a knowledge journey, both for POPAI itself and for the industry. With the underlying principle of promoting best practice, we will be investing substantially in projects to better support and inform the industry on matters of sustainability from every aspect.

The first of these is this report on recycling of temporary display and packaging. In the future, we will be looking at permanent display, materials alternatives, design guidelines and other critical matters for building a sustainable future.

I would like to thank our sponsors HH Global, Linney and Antalis for helping us make this possible, and we look forward to providing further initiatives in the future.

Martin Kingdon

Chair and Sustainability Director

POPAI UK & Ireland

Introduction



Recycling and recyclability are key factors in sustainability manifestos for retailers, brands and suppliers. Recycling targets and achievements are also central metrics in company reports, mostly measured at a holistic level, encompassing all areas of a business.

POPAI has been leading the sustainability agenda within the Point of Purchase industry for over

ten years, encouraging businesses to evaluate their environmental positions and to seek to improve their sustainability credentials. With the underlying principle of promoting best practice, we will continue to invest substantially in projects to better support and inform the industry on matters of sustainability from every aspect.

This report focuses principally on temporary display, but we will subsequently be looking at other areas of the industry, with a view to gaining and sharing a wider understanding of recycling and other environmental issues."

Research Methodology

Our research focused specifically on temporary display and secondary packaging.

Data was collected through a series of online questionnaires and in-depth telephone interviews with leading retail chains, international brands and waste management companies, as well as ongoing dialogue with point of purchase display suppliers. Symbol group convenience stores and independent pharmacies were also visited and asked about their recycling practices. Waste management companies were visited to get a first hand understanding of the issues posed by recycling of point of purchase material.

Desk research was conducted to explore the wider issues and trends within the UK and Ireland recycling industry in relation to retail operation.



Objectives included:

- Establishing the perception versus reality of recycling by retailers across the UK and Ireland.
- Gaining a clear understanding of the recycling, recyclability and re-use of temporary in-store marketing campaign materials.
- Identifying any barriers to recycling.
- Establishing a transparent lifecycle view of in-store marketing including design, manufacture, installation and end-of-life recycling.
- Highlighting any opportunities to increase recycling and decrease landfill rates.

Sponsors

POPAI UK & Ireland is very grateful to the three corporate 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:



Findings



The survey revealed a range of findings, some of which confirmed widely held assumptions within the retail and POSM industries. Other results were more surprising and gave rise to possible solutions, or at least opportunities, for improving retailers' ability to recycle POSM.

What became immediately clear was that, irrespective of where retailers and brands are on their sustainability journeys, the recycling and environmental credentials of POSM rarely, if ever, feature in CSR policies. However, 88% of those taking part still said recycling and sustainability was very high on their agendas.

Indeed, many organisations are making strides in the recycling of POSM and secondary packaging. Those more closely connected with the sourcing and/or disposal of these materials have already put quantifiable recycling and other sustainability targets in place, or are at least planning to do so.

Encouragingly, there appears to be a healthy and ever-increasing dialogue between retailers, brands and their POSM suppliers, to continuously improve the recyclability of displays. In terms of requesting particular materials, 78% of POSM clients had specifically instructed suppliers about which materials not to use.

Also, over 90% of clients said they consider a supplier's sustainability credentials during the tendering process.

On the downside, retailers and brands have limited capabilities to accurately measure how much POSM material is recycled. Whilst 86% of stores claim to recycle over three-quarters of temporary display equipment, not all respondents could confirm how they measured and recorded their recycling rates.

Additionally, an overwhelming majority of brands have no idea how much of the POSM display they supply to stores is ultimately recycled. We also found that there is a widely held belief that 100% of card would be recycled at stores because this was what brands had read in the retailers' CSR reports.

When it came to an understanding of the recyclability of materials used in POSM, half of the retailers questioned thought there were materials regularly used in temporary displays which could not

be recycled. Meanwhile, over a third of brands were unsure of the percentage of recyclable material in their temporary displays.

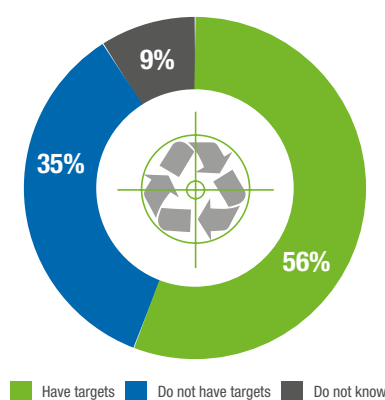
All respondents agreed that recycling and the wider environmental agenda will become increasingly important in the minds of consumers. A variety of measures that retailers and brands believe could be improved upon or implemented to help improve recycling rates were identified, including:

- The provision of easily understandable recycling and disassembly instructions that would remain attached to displays to be implemented at the end of life.
- Stronger design guidelines to promote more environmentally friendly design, in conjunction with the use of a sustainability scoring system, which could be used to compare and measure the sustainability credentials of displays.

Of the independent stores visited, 69% said they separate all recyclable materials at the store for collection, or for backhauling to depot in the case of symbol groups.

Discussions with waste management companies revealed that the UK and Ireland's recycling rates are high across all sectors. However, whilst the collection and segregation of recyclable materials works well there is very limited ability to process these materials in the UK and Ireland, with about 80% having to be exported to be processed.

Percentage of respondents with measurable recycling targets for display material and packaging



Source: POPAI

Conclusions



Although it appears that intentions are good and sustainability and recycling are high on the agenda for most retailers, brands and suppliers, the recycling of POSM seems to be a focus only for those directly responsible for it, not for the wider organisation or at senior level.

There is a unanimous belief that retailers are ultimately responsible for POSM. Meanwhile, clients rely on their suppliers for design and technical expertise. However, there is inconsistency in, and in some cases lack of, understanding of the

sustainable and recyclability credentials of materials used on behalf of those who commission POSM.

Furthermore, there is little consistency in the way POSM recycling rates are measured and there is often a lack of understanding about how this data is captured.

It is clear that there is still much work ahead to make real inroads in this area.

POPAI would like to thank our sponsors HH Global, Linney and Antalis for helping us make this report possible and we look forward to providing further initiatives in the future.

As an extension to this research, in 2022 POPAI will be undertaking a new project to investigate how permanent point of purchase is dealt with at end of life.

Access the full findings from this research and discover more about POSM and packaging recycling in the UK & Ireland.

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



Read the **FULL REPORT**

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