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 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 instigate 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 last 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, finally introducing 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 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
Executive summary

Recycling in retail has been a hot topic for many years now. The spotlight in the environmental press has fallen mainly on primary packaging i.e. that which is in direct contact with the product and which leaves the store with the shopper, for them to dispose of.

However, little if any attention appears to be paid to the recycling of point-of-sale displays. In this report, POPAI takes a closer look at what happens specifically to temporary point-of-sale materials (POSM) and secondary packaging, which is mainly disposed of in the UK and Ireland through retailers’ waste streams.

With POSM and secondary packaging both predominately made from cardboard, we wanted to ascertain if these materials are all treated in the same way. We wanted to understand if the commonly held industry beliefs regarding the treatment of cardboard and other recyclable products at the back of store are reflected in reality.

In doing so, we sought to identify any barriers that deter or prevent efficient recycling of POSM and secondary packaging and explore what could be done to mitigate these.

Additionally, we explored the conversations between clients (brands and retailers) and their POSM suppliers to establish if any guidance or directives are given regarding the use of particular materials, the quantity of recycled content and designing for end-of-life recycling.

This research was conducted against an economic backdrop where the retail sector is the largest contributor of commercial waste in the UK and Ireland, in which there is a highly regulated and complex waste management and recycling regime.

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.

In reality, however, 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.

When it comes to the responsibility for recycling of temporary POSM, the industry is unanimous in the belief that this should lie with retailers. However, many brands who supply retailers with displays also feel that they have a responsibility to design these in a way that promotes recycling at end of life.

This aspiration becomes all the more important given that our research also revealed that training store staff in recycling has its challenges and that the time available to correctly implement recycling procedures in-store is limited.

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.

However, on the downside, retailers and brands have limited capabilities to accurately measure how much POSM material is recycled.

As for the future, all agreed that recycling and the wider environmental agenda will become increasingly important in the minds of consumers. To help meet this challenge, our research identified a variety of measures that retailers and brands believe could be improved upon or implemented to help improve recycling rates.

Foremost amongst these was the provision of easily understandable recycling and disassembly instructions that would remain attached to displays to be implemented at the end of life, such as QR codes printed on the units.

Also highly recommended was 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.

To conclude, the research highlighted the fact that, although initiatives are being implemented to improve the recyclability of POSM and to try and measure the effects of this, there is no consistency of approach. As such it will remain challenging to source dependable data that can be used to make fair and reliable comparisons across the industry. This was further borne out by the lack of existing information available specifically on recycling of POSM and attitudes on the subject.

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

Over the years, we have globally become increasingly aware of the need to protect our planet. At home, most of us faithfully recycle our used packaging via regular refuse collections or at designated recycling points. But how does this translate commercially, specifically to retail? In recent years, there has been a clear spotlight on sustainability and all things environmental across all sectors of society and industry. Not least in retail. So why exactly should retailers recycle? And how do they go about it?

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.

The concept is also firmly engrained in the psyche of shoppers and consumers worldwide as they demand sustainability credentials for their purchases.

In this report, POPAI examines the specific practices and challenges of recycling temporary point-of-sales materials (POSM) display, with a focus on those made from cardboard*.

As cardboard from temporary display is often treated in the same way as that used in secondary packaging, our research also explores how this type of material is dealt with from a recycling perspective.

* We will be conducting a similar study looking at recycling permanent displays in the near future.
Research Methodology

Our research focused specifically on temporary display mainly — but not exclusively — made from card and other paper-based products.

We also looked at secondary packaging, including outers and shelf-ready packaging. However, we did not look at primary packaging*.

Our research encompassed a series of initiatives. We conducted online questionnaires and interactive surveys via Zoom, Teams and telephone with leading retail chains, international brands and waste management companies. These covered a wide range of recycling-related topics to gather quantitative and qualitative data. Respondents typically included POS managers, shopper and trade marketing managers and sustainability managers.

To understand how the recycling function works in the retail sector, we also spoke with some of the UK’s leading waste management companies. This helped us to understand any challenges posed by recycling temporary POSM equipment and secondary packaging.

Plus, we visited symbol group convenience stores and independent pharmacies, as well as waste management depots.

Finally, we conducted desk research to explore the wider issues and trends within the UK and Ireland’s recycling industry in relation to retail operations.

POPAI also wanted to establish what type of conversations and communications took place between retailers, brands and their print and card suppliers regarding the recyclability of POSM and secondary packaging materials.

Specific objectives of the research included:

- Establishing the perception versus reality of recycling in-store materials from the back of stores, shopping centres and regional distribution centres across the UK and Ireland.
- Gaining a clear understanding of the recycling, recyclability and reuse of temporary in-store marketing campaign materials.
- Gathering insights into any barriers to recycling, or recyclability, of in-store marketing campaigns, and why they exist.
- Establishing a transparent lifecycle view of in-store marketing from design, manufacture, installation and end-of-life recycling.
- Discovering what prevents in-store marketing campaigns from being recycled or being recyclable.
- Highlighting any opportunities to increase recycling and decrease landfill rates.
- Reviewing recycling revenues from collected recyclables.
- Making recommendations on initial design requirements to enhance and increase sustainable credentials of in-store marketing, use of sustainable materials, increase recyclability, reuse and end of life opportunities.

We were particularly interested in knowing what, if any, guidelines retailers and brands issued to their providers of POSM and packaging materials, or if they actually mandate materials to be used.

Conversely, we asked what advice, if any, suppliers gave to their clients to help them achieve their recycling targets.

We also explored how retailers measured the recycling and recyclability of POSM and packaging materials, exploring any issues or barriers to recycling they had encountered. Plus, we asked whether retailers or brands consider themselves responsible for recycling POSM displays.

* Primary packaging (sometimes referred to as consumer or retail packaging) i.e. that which is in direct contact with the product itself was not part of this research. Secondary packaging is that which primary packaging goes into or onto, or is wrapped in e.g. pallets or shrink wrap.
Sponsors

POPAI UK & Ireland are 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:
The recycling scene

Why recycle?

The obvious question. And the answers lie in environmental responsibility, commercial intelligence and shopper and consumer awareness.

The retail sector is one of the UK and Ireland’s largest producers of commercial waste. This means that companies operating in the retail industry have real opportunities to deliver some of the biggest benefits for the environment and promote the conservation of natural resources through recycling.

Indeed, recycling should be a fundamental component of any country or organisation’s sustainability initiative. It is integral to the circular economy: the concept that is aimed at eliminating waste and promoting the continual use of resources.

Brands and retailers have long been aiming to reduce the amount of waste sent to landfill. This, along with the ultimate goal of zero waste to landfill, are headline targets in many CSR policies. Key to achieving this is the ability for retailers to recycle as much, if not all, of the redundant products that come out of the back their stores.

In turn, ensuring these products are made from easily recyclable materials and are assembled in such a way that does not compromise their recyclable credentials is key to achieving that.

Efficient recycling schemes can also bring economic benefits. Defra calculates that UK businesses could benefit by up to £23 billion per year through low-cost or even no-cost improvements in the efficient use of resources.

The diagrams below from WRAP show how the UK economy could be transformed by embracing the concept of the circular economy model and building it into the heart of its thinking. As shown, recycling is the cornerstone to achieving this.
Companies sending waste to landfill are subject to landfill tax, and also have the administrative burden of completing all the paperwork associated with compliant waste disposal.

And it is not just landfill that needs to be avoided. Although sending non-recyclable materials to energy-from-waste plants (EFWs, aka incinerators) is in some respect more environmentally friendly than landfill, it is not without issues. EFWs are significantly more efficient than they once were. However, they are on average 40% less efficient at producing energy than burning gas in modern generator systems — unless they also recover heat, which not all EFWs do.

Significantly, EFW plants also generate 65% more carbon dioxide than generator gas power stations and more CO₂ per unit of electricity than coal. Burning plastics has also been proven to release dioxins, furans and styrene gases. These health hazards are less likely, however, if the materials are burned at higher temperatures.

Another good answer to the question ‘Why recycle?’ is that it is what the public wants. Even through the COVID pandemic, sustainability and the environment remained one of the biggest media topics and is high in the public consciousness.

Environmental concerns continue to shape consumers’ attitudes, and significantly so. In fact, 82% of UK shoppers claim that environmentally friendly labelling influences their purchase decisions. A further 59% say they actively avoid particular types of packaging.

When asked what sustainability means to them, 64% said that it was about ‘meeting the needs of the present without compromising the needs of the future generation’. Notably 46% also specifically mentioned recyclability, saying that sustainability is about ‘renewable or recyclable resources’.

When it comes to sustainable shopping behaviour, 69% of shoppers believe it is about buying packaging that is recyclable, as well as considering the sustainability credentials of the product itself. Meanwhile, 43% also consider easy-to-recycle packaging options as part of their purchasing decisions, and 42% look to avoid single-use plastics.

Tellingly, two thirds of shoppers would like to see a complete ban on non-recyclable packaging.

All strong food for thought for brands and retailers when setting out their sustainability strategies. If we logically assume these shoppers have the same views about the recyclability of POSM, it follows that they would want the sustainability credentials of display materials communicated in some way.

**Alternatives to recycling**

Recycling should never be the first or only option for an organisation. There are a number of considerations they could apply first, including:

**Refuse.** Only use materials that do not damage the environment and are easily recyclable.

**Reduce.** If using potentially environmentally damaging materials is unavoidable, try to minimise the amount used and only buy what is needed, when it is needed.

**Reuse.** Where practicable, reuse products rather than disposing of them after a single use.

**Repurpose.** Find alternative uses for a product that would otherwise be thrown away.

**Recycle.** This is actually the final step of the process, whereby an item is taken to a recycling plant to be given a new lease of life.

**What are the rules and regulations for recycling?**

Guidance and regulations are in place in the UK and Ireland to assist retailers and waste management companies in achieving compliance, as well as meeting their own recycling and waste to landfill targets.

These include UK Waste Regulations which state that: “Businesses are to separate their recyclable materials (paper, glass, plastic etc.) from general waste. Government waste policy is predicated on a system of waste hierarchy intended to urge consumers to consider prevention, reuse, and recycling before disposal.”

The government continues to introduce new regulations, with large electrical retailers obliged to take back waste electrical and electronic equipment (WEEE) in-store since January 2021.

From 1 April 2022, the government will be introducing the Plastic Packaging Tax (PPT), a new tax on plastic packaging. The aim of the tax is to encourage organisations to use packaging that contains recycled plastic content instead of virgin material. This will help to create greater levels of recycling and plastic packaging waste collection within the UK.

Any plastic packaging items manufactured, imported into the UK, or imported as filled product, that contains less than 30% recycled plastic will be liable under the tax. These items will be taxed at £200 per tonne and will apply to plastic packaging on a per-component basis, and multi-material components if they are predominantly plastic by weight.

Please see Appendix A for further information regarding recycling regulations and guidance provided by the UK Government, WRAP and Repak.
How are waste and recycling materials handled?
Larger retailers have traditionally partnered with waste management companies to fulfil their recycling requirements.

Typically, a waste management company with a recycling capability should be able to take care of all of an organisation’s commercial recycling needs and provide expert advice on how to store and organise waste before collection, including access to recycling bins. They can also ensure that materials for recycling are safely collected, transported, and disposed of in an environmentally friendly manner. Finally, they can also help to discharge some of the company’s legal responsibilities relating to waste management and disposal.

Retail recycling initiatives
Since the first initiatives to remove plastic bags, retailers have introduced a significant number of sustainability enterprises. These include things like replacing plastic with cardboard and introducing packaging-free products, with shoppers instead bringing their own containers to fill with products like rice, pulses and cereals. Shoppers can now often also return soft plastics such as crisp packets, which cannot be put into kerbside recycling. And plastic bags, even bags for life, are pretty much a thing of the past now, replaced by paper-based equivalents or other alternatives.

However, these initiatives are almost all exclusively aimed at primary packaging. Rarely, if ever, is POSM mentioned as a target for improved recycling initiatives. An extensive review of leading retailer and brand CSR policies and reports tells the same story. While many of these national and global companies have comprehensive sustainability programmes with detailed targets covering everything from CO₂ reduction to ethical resourcing, often based on the United Nations Sustainable Development Goals, POSM does not feature.

There is just one exception. A major grocery retailer has announced it has removed unnecessary plastic from freestanding display units and customer signage in its UK stores as part of plans to reduce the amount of plastic they are directly responsible for by 15% by 2021. This includes working to make in-store displays more sustainable and cutting down on plastic and non-recyclable materials.

They told us they had already saved around eight tonnes of plastic by removing plastic mop trays from the bottom of cardboard freestanding units used to merchandise clothing accessories and general merchandise products. Last year they also launched a fully recyclable unit which will display the reusable and washable fruit and vegetable bags in its produce department.
Research results

Recycling targets for display and packaging materials

The first question to both retailers and brands was about their measurable targets in relation to overall sustainability issues. We specifically wanted to know if they had any recycling targets for display materials and secondary packaging.

Nearly all respondents had corporate sustainability goals, some very comprehensive and extremely detailed. But only about two thirds had specific measurable targets for secondary packaging and POSM display materials within those targets. The remainder would, however, include the recycling of packaging and display materials in their overall generic sustainability targets.

Typical responses for those without specific targets for display or secondary packaging materials were:

“We have a big focus on our corporate sustainability, but it does not flow down to the design of print and displays.”

“Nothing specific for displays but we do have global recycling and sustainability targets.”

One thing was abundantly clear. For most brands and retailers interviewed, plastic in all forms, but particularly that used in packaging, remains the key cause for concern. As such, it featured heavily in their wider environmental policies.

Likewise, increased recycling rates with the aim of 100% diversion from landfill featured heavily in responses. However, little mention was made of the destinations of products not recycled at the end of life.

It was also clear that many companies are still on a journey towards their recycling targets. Several mentioned that while they do not currently have the means

Leadership and responsibility

Unsurprisingly, the larger organisations we interviewed tended to have a dedicated department or departments focusing on sustainability. Smaller companies often had just an individual. Encouragingly, with the exception of just three brand and one retail respondents, the employees responsible for managing and implementing initiatives did so as a full-time role, albeit often supported by others seconded from other departments.

At senior leadership level, larger organisations often had a dedicated director responsible for sustainability either at a national and/or global level. Again, however, little mention was made of POSM featuring as one of their specific responsibilities. As previously mentioned, extensive research of corporate CSR policies and reports did not find any mention made of sustainability targets specifically for POSM.

Structures and focus obviously vary by company type and size. Brands tend to place emphasis on the wider sustainability agenda, while retailers can also concentrate on recycling, which is more within their control.

Typically, there is a waste team within a retailer, sitting either independently or as part of the wider sustainability team, which is responsible for recycling policy and procedures.

Sustainability and recycling resources

to measure the amount of material they recycle, they plan to be able to do so in the near future. But despite these good intentions, few gave any specific details about how they planned to achieve this.

Some companies communicate their sustainability strategy clearly and effectively within their organisations. Unfortunately, this is not always the case. Headline goals did not necessarily translate into actionable targets elsewhere in the business.
Research results continued

The importance of recycling and sustainability

We asked how much importance was placed on the recycling and sustainability of POSM and secondary packaging. Notwithstanding the fact that many companies do not yet focus on these, 88% of those taking part still said it was very high. Those who only rated their focus as average were smaller brands still developing their environmental policies or symbol group retailers who rely heavily on their supply partner for both sourcing sustainable products and recycling waste.

Supply base

We wanted to understand the different sizes of supply bases for print and display materials used by companies, given that it is likely to be easier to access and measure the environmental credentials of a few suppliers rather than many.

The results showed that just over half of companies — both retailers and brands — used up to ten suppliers while a quarter used up to 25. Just 8% used only one supplier.

It is worth noting that some retailers and brands used agencies to subcontract print suppliers in particular, and so had less idea of specific numbers.

Guidance to suppliers

Irrespective of the size of their supply base, how do organisations communicate with their suppliers? We were particularly interested in how they requested or even mandated the amount of recycled material used in the construction of temporary display.

The majority of brands were having this type of conversation with all of their suppliers, with a quarter planning to start doing so in the near future.

Half the retailers were also similarly engaging with all of their suppliers, with most of the rest talking to up to three quarters of their supply base. Perhaps reassuringly, across all respondents only one was not having this type of conversation with their suppliers.

In terms of requesting particular materials, 78% had specifically instructed suppliers about what not to use.

Several retailers employ a RAG system (red, amber, green) which suppliers, including brands, must follow if their displays are to be accepted. Typically, they should completely avoid materials on the red list. Those rated amber may only be used if no suitable alternative is available, with only preferred materials getting into the green category.

PVC was mentioned by half of brands and retailers as a material not to use. Others vetoed laminates and glitter — unless they could easily be removed from the cardboard structure so that it could be recycled.

Supplier selection

The majority of companies — over 90% — said they consider a supplier’s sustainability credentials during the tendering process. Even some who rely on agencies to select third-party suppliers still make stipulations about their environmental accreditations.

However, requirements are far from consistent, with a wide range of certifications specified including:

- ISO 14001 (environmental management systems)
- SEDEX (ethical trade membership organisation, working with businesses to improve working conditions in global supply chains)
- ECOVADIS (business sustainability ratings)
- FSC (Forest Stewardship Council)
- PEFC (Programme for the Endorsement of Forest Certification)
- Registered to use the Sustain® eco indicator tool.

However, only ISO 14001 and FSC were mentioned by more than a couple of companies.

Other requirements include the ability to provide the materials listed as acceptable by the client company and the capacity to provide specified recycled content in materials.
Providing recycling information about POSM display

Store staff being able to recycle materials in their proper recycling stream is fundamental to avoiding otherwise recyclable materials finding their way to landfill or incineration. Retailers keen to meet their recycling targets and reduce their landfill tax liability, and brands wishing to maintain reputation through responsible disposal of their displays, would logically assist them in this.

But, interestingly, very few POSM suppliers are currently providing such disposal information and few conversations are taking place between clients and suppliers about providing such information.

As can be seen from the graph (right), 41% of respondents reported that at least some of their suppliers were already providing instructions on how to recycle POSM display in some form or another. Just over half of these receive these instructions on all of their displays.

A further 21% are either currently having discussions with suppliers about getting this information or are planning to do so in the near future. However, 34% had no idea if conversations on this subject were taking place at all.

Where information is provided this tends to be in the form of a logo. This can be confusing, though — either not readily understood by store staff or not being at all obvious on the display due to its position.

There was, therefore, some debate about the value of printing a recycling logo on a display, which may or may not be seen by either staff or shoppers. POPAI will explore the benefits or otherwise of using recycling logos or other sustainability messages on displays in a future study.

Is recycling information being provided by suppliers?

| Information already provided | 41% |
| Information discussed but not currently provided | 17% |
| Information not discussed but plan to do so | 4% |
| Information not discussed with no plans to do so | 4% |
| Do not know | 34% |

Source: POPAI

Who is responsible for recycling POSM display at the end of life?

| Retailers’ view | 100% |
| Brands’ view | 92% |

Source: POPAI

Who is responsible at end of life?

Retailers were in complete agreement that temporary display recycling at end of life was their responsibility. However, some brands felt they had moral responsibility. Key here is for brands to make sure displays they send to stores are as easy as possible for store staff to recycle.

The importance of this was emphasised in discussions with retailers, all of whom said that staff resource and training in relation to recycling in-store was an issue for them.
**Research results continued**

**We put the following questions exclusively to retailers**

**Keeping track of recycling**

We asked retailers if they kept records of the amount of POSM display material they recycle and if so, how.

Their answers told us that display materials are segregated and recorded less than half the time, irrespective of location. The highest percentage is recorded at store level and the least at shopping centres, where it is very often the responsibility of the centre management rather than individual retailers.

Interestingly but perhaps understandably, a significant number of shopper marketing respondents did not actually know how POSM were dealt with at end of life.

Practices also varied. Some stores segregate their recyclable waste at store level before sending to RDCs (regional distribution centres) and others send mixed waste to depots to be segregated there.

**What specific recycling and waste streams are available at store level for material segregation and disposal?**

All stores reported having the facility to segregate cardboard for recycling. A significant 90% were able to handle recyclable plastic and 70% WEEE items. The latter partially depended on the type of store and products stocked under the Government’s Electrical Retailer Take-back scheme launched in January 2021.

The use of electrical components on temporary displays, such as LED lighting, is quite rare, mostly appearing at Christmas. Where they are used, retailers told us the electrical equipment is segregated at store just over half the time and at a depot 18% of the time. The remainder either did not know or did not permit electrical components on temporary displays in the first place. This being the case, how much LED lighting is potentially going to waste?

**Where display materials are segregated and recycling rates recorded**

<table>
<thead>
<tr>
<th>Segregated at store</th>
<th>Segregated locally (shopping centre/landlord)</th>
<th>Segregated regional distribution centre</th>
<th>Not segregated</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>36%</td>
<td>25%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>45%</td>
<td>50%</td>
<td>44%</td>
<td>50%</td>
</tr>
</tbody>
</table>

**Recycling and waste options available in stores**

<table>
<thead>
<tr>
<th>Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
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<table>
<thead>
<tr>
<th>Plastics - recyclable</th>
</tr>
</thead>
<tbody>
<tr>
<td>91%</td>
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</table>

<table>
<thead>
<tr>
<th>Plastics - non recyclable</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
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</table>

<table>
<thead>
<tr>
<th>Waste electrical components</th>
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</thead>
<tbody>
<tr>
<td>73%</td>
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<table>
<thead>
<tr>
<th>Batteries</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
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<table>
<thead>
<tr>
<th>Metal</th>
</tr>
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<tbody>
<tr>
<td>45%</td>
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<table>
<thead>
<tr>
<th>Other materials - recyclable</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Other materials - non recyclable</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
</tr>
</tbody>
</table>

**What also became apparent from our research was the various routes recyclable materials took from the store.**

Larger chains tend to backhaul material to their RDCs, where it is either segregated or checked to ensure it has been properly segregated in-store. Research revealed the latter very often does not take place, with large amounts of mixed materials, including products, being delivered to depots in the same containers. This inevitably causes issues at the depot.

Smaller stores in some retailers’ estates are not always accessible to large delivery vehicles. In these instances, material for recycling has to be collected by contract waste management companies using smaller vans.

Other retail chains do not backhaul at all. Instead, they use a variety of different waste management companies to collect materials for recycling and different companies for waste.
Research results continued

Who is responsible?
With just one exception, the store manager was considered ultimately responsible for effectively recycling materials in-store. This was particularly true of smaller stores. However, in larger outlets, the day-to-day supervision is often delegated to a duty manager or, in some cases, a specialist role such as Store Operations Manager.

Store recycling rates
Just how much POSM material do retailers recycle? Over half said between 75% and 100% — whether the retailer’s own print or display material or that supplied by brands. A further 36% of retailers said between half and three quarters of display material is recycled.

This means that 86% of stores claim to recycle over three quarters of temporary display equipment. However, not all respondents could confirm how they measured and recorded their recycling rates.

Secondary packaging achieved even higher recycling rates, with over 70% of retailers reporting that 100% of this material is recycled.

Reasons given for materials not being recycled included items being ‘lost’ into the general waste stream, and it was not always clear to retailers if these were subsequently sorted further on. Other reasons cited were ‘materials not being recyclable’, either perceived or genuine.

Do brands uplift their displays at end of life?
Brands do not uplift temporary displays at the end of life, nor do retailers generally ask them to do so, with some saying that this would be impractical. Most said that they simply do not have the resource do so.

What training do store staff receive?
The majority of retailers give their staff some kind of guidance for recycling materials at stores. This varies significantly by retailer, from posters in staff areas, modules within induction courses, and eLearning courses, to instructions on the recycling bins themselves. However, this is a very complex area which requires ongoing training and monitoring if recycling at stores is to be conducted effectively.

How much POSM and product packaging is recycled?

<table>
<thead>
<tr>
<th>Material</th>
<th>Recycle Rate</th>
</tr>
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<tbody>
<tr>
<td>P-O-P from stores’ own print and card suppliers</td>
<td>36%</td>
</tr>
<tr>
<td>Packaging materials from stores’ own print and card suppliers</td>
<td>73%</td>
</tr>
<tr>
<td>P-O-P from stores’ brand suppliers</td>
<td>36%</td>
</tr>
<tr>
<td>Packaging materials from stores’ brand suppliers</td>
<td>73%</td>
</tr>
</tbody>
</table>

Source: POPAI

Are retailers aware of any materials that cannot be recycled?

Exactly half of the retailers questioned thought there were materials regularly used in temporary displays which could not be recycled. However, just a fifth thought there were recyclable materials used in secondary packaging. It was clear there is a vastly different levels of awareness amongst brands and retailers when it comes to their understanding of materials and their recyclability.

Specifically, PVC, polystyrene and laminated materials were cited as those which were believed to be unrecyclable.

Are you aware of any types of POSM or packaging materials used in store that are not recyclable?

<table>
<thead>
<tr>
<th>Material</th>
<th>Temporary POSM</th>
<th>Permanent POSM</th>
<th>Packaging materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>45%</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>No</td>
<td>10%</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Do not know</td>
<td>45%</td>
<td>30%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: POPAI
Research results continued

Does recycling pay?
45% of retailers said that recycling provides their companies with a revenue stream. Two thirds of these said this does affect the materials their print and POSM suppliers are allowed to use. However, a significant amount of those asked did not know if recycling provided them with an income.

Also, few were clear whether the income received from recycling covered the cost of their internal recycling processes or outweighed the cost of disposing of general waste.

Is waste material recycling a revenue stream?

![Diagram showing percentage of retailers who see recycling as a revenue stream.](image)

Source: POPAI

Regional variations in recycling
Few retailers believe there are regional variations affecting the ability to recycle materials or process waste. Their national waste management partners were able to handle waste materials irrespective of where they are collected.

The only exception mentioned was the lack of waste-to-energy plants in parts of Scotland and the Isle of Wight. This resulted in some waste going to landfill, as it is not environmentally viable to transport it to the nearest waste-to-energy power plant.

The following questions were put specifically to brands

Do retailers specify recycling requirements to their brand suppliers?
38% of brands said that up to 75% of their retail partners did make some stipulations regarding the recyclability of display materials sent into their stores. However, the specifics varied considerably. Some brands seemed well versed in their retail clients’ requirements such as RAG systems, while others were barely aware of them. While some retailers had very specific requirements, which could vary by display type, others only provided very generic guidelines.

Display supply chain
We asked brands how they distribute displays to stores, what they thought their placement success rate was and what happens to display equipment that does not find its way into stores.

What percentage of temporary POSM reaches stores?

![Chart showing percentage of temporary POSM reaching stores.](image)

Source: POPAI

How many of your retail partners specify recycling requirements for POSM supplied to their stores?

![Chart showing percentage of retail partners specifying recycling requirements.](image)

Source: POPAI

Most brands store their temporary display equipment either in their own warehouses, or those of their suppliers, prior to its distribution. If not all displays get delivered to stores, they are usually returned to these warehouses and ultimately recycled or reused by the brand.

Others employ third-party waste management companies to collect and recycle excess display equipment. Meanwhile, some believe that any displays delivered to stores but not placed will be recycled at the store.

Several brands said they have become far more conservative in recent years, with their ordering based on monitoring display placement rates and no longer producing spare equipment. This in turn has led to far less surplus stock. In fact, over 18% of brands believe that up to 100% of their displays get placed in-store, with a further 36% saying that up to 95% finds its way onto the sales floor.

Of the temporary display material that does not get delivered, 81% of brands say this is recycled. The remainder confessed to not knowing the eventual destination of these displays.
Research results continued

How much recyclable material do brands provide?

Over a third of brands we spoke to were unsure of the percentage of recyclable material in their temporary displays. Of those that did have an idea, they were confident that it was over 70-80%. Again, it was not always clear how this information is captured and recorded.

Some brands have also set themselves the target of making their displays entirely from recycled material in the next few years.

Recycling information provided by brands

Almost a quarter of brands told us they offer some kind of recycling instructions for all the displays they provide, with the same amount saying they do so for up to three quarters of their displays. While a further 23% do not currently supply this information, they plan to do so soon.

In some instances, providing this information is a retailer requirement. Where these instructions are being provided voluntarily but not necessarily for all displays, some brands are working to achieve 100% compliance. However, there are barriers, especially when it comes to small units with limited space to print full instructions. These will often only be supplied with recycling logos rather than more comprehensive instructions.

Do brands know what happens to their display materials?

An overwhelming majority of brands have no idea how much of the POSM display they supply to stores is ultimately recycled. Under further investigation we discovered that the small number who said they did know in fact simply believed that 100% of card would be recycled at stores or because it was what they were led to believe by retailers’ CSR reports.

This assumption by brands that all cardboard, whether packaging or display, goes into retailers’ cardboard recycling streams is interesting. Retailers themselves and POPAI’s own research have revealed this is not always the case.
Research results continued

Finally, we asked both retailers and brands about their broader views on recycling in the retail industry.

We asked our respondents what could be done to improve recycling of POSM displays and packaging materials.

Of all the options suggested, recycling instructions printed on displays was the most popular suggestion. The idea of printing QR codes on the back of displays was also well received, as these could provide detailed information on how to recycle a display, while using only minimal space.

Another popular suggestion was stronger design guidelines to promote more environmental design and ease of recycling at end of life. Allied to this was providing a display sustainability scoring system, which could be used to compare the sustainability credentials of different displays.

The need for more data on how to recycle materials was also raised. Most brands and retailers said they are completely reliant on their display and print suppliers for information on new materials and their sustainability credentials. One retailer specifically stated that they do not know what displays are made from, so store staff do not know what to do with them.

Store staff and training and awareness on how to recycle displays and other materials was also a popular theme. One brand told us that “unless staff know how to interpret recycling instructions, displays will not get recycled.”

Keeping the recycling process at the end of life for display simple was also raised as a key point, as stores only have limited resource and time for dismantling displays and training staff.

There was also a feeling that most organisations only really react to legislation, so without it there would be very little progress. Another suggestion was that it “would be good if legislation could be implemented to minimise delivery distance and encourage more efficient methods.”

Is there anything else that could be done to improve the recycling of display and packaging materials?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legislation</td>
<td>43%</td>
</tr>
<tr>
<td>Stronger design guidelines</td>
<td>57%</td>
</tr>
<tr>
<td>More staff awareness/training</td>
<td>48%</td>
</tr>
<tr>
<td>Use of a sustainability score system</td>
<td>35%</td>
</tr>
<tr>
<td>More data on how to recycle materials</td>
<td>52%</td>
</tr>
<tr>
<td>More printed recycling instructions on displays</td>
<td>65%</td>
</tr>
<tr>
<td>Improved national recycling centres</td>
<td>22%</td>
</tr>
<tr>
<td>Do not know</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: POPAI

Staying on the legislation theme, another brand observed that “currently there is a lack of consistency across the industry amongst retailers, brands and suppliers. Some form of internal regulation, as opposed to external legislation, that would facilitate fuller disclosure of material details, their origins, methods of transport, processes etc. would make it much easier for organisations to meet their sustainability targets”.

We also asked what barriers companies had encountered when trying to implement recycling procedures. Cost and resource were the overwhelming responses. Stores cited the costs associated with providing adequate staffing for in-store recycling and also for processing hard-to-recycle display. Brands also recognised the challenges faced by retailers, as well as the cost of robust-but-sustainable materials.

Two or more readily recyclable materials being bonded together rendering all of them unrecyclable also continues to be a problem.

Other issues raised included the complexity surrounding sustainability and recycling, along with the lack of suppliers for certain environmentally friendly materials such as non-virgin acrylic.

What does the future hold for POSM recycling?

When we asked for our respondents’ thoughts and predictions the answer was unanimous: “It will only get more important.”

One brand commented; “Customers are driving the agenda, which is being formalised by legislation. Customers now expect packaging to be recyclable. It is no longer a USP. It is also the ‘gateway’ for consumers to engage with sustainability issues.”

Another said: “Brands will look to ensure that all shopper/consumer touch points are sustainable and communicate sustainability i.e. not just the product but also POSM and advertising.”

Interestingly another observation was that “Whilst shoppers are impressed by sustainability messages they do not base their purchase decisions on them, so everything needs to be sustainable before the shopper even considers their purchase.”

At least two respondents believed that the sustainability agenda has generational implications, with younger consumers being more aware and engaged than some of their older counterparts, and that some companies could be doing more: “Society thinks and says we should be more responsible, but not all companies translate this into actions. Enthusiasm differs by generation.”

Some retailers also mentioned they are trying to move away from single-use temporary displays, which only last for one promotional period before disposal. The option of using a permanent frame clad with graphics which can be changed for each promotion was mentioned on several occasions. One retailer estimated that only 50% of temporary displays are actually placed in their retail estate.
Independent store visits
To understand how recycling works in smaller independent stores and symbol groups, POPAI visited 36 convenience stores, CTN (confectionery, tobacco and news) stores and independent chemists.

We asked store staff if they knew if waste materials were separated at the store and if so, what recycling or waste streams they went into. Plus, we wanted to find out who was responsible for collecting recyclable materials and waste.

They were also asked what specifically happens to temporary display materials once the store had finished with them.

69% of the independent stores said they separate all recyclable materials at the store for collection, or backhauling to depot in the case of symbol groups. A further 11% said they separate just cardboard for recycling. The remainder said that all waste, including recyclable materials, goes into general waste.

39% of stores have their recyclable materials collected by the symbol group who supply their stock as part of their franchise agreement. Empty roller cages are filled with broken down cardboard and backhauled to a depot after each delivery. The frequency varied from one to three times a week in the stores we surveyed. Of the symbol groups we visited, this was the case for Co-op, Costcutter, McColl’s, Nisa and One Stop.

Cardboard was collected by the local council or other local initiatives such as a Business Improvement District (BID) in 39% of cases.

Only 8% of stores used a waste management company to collect their cardboard although 86% used private waste management services to collect their general waste, with local councils collecting the rest.

Recyclable plastic went into general waste rather than a recycling stream in 11% of stores. One very small independent convenience store collected plastic and cardboard separately and took it to the public recycling bank at in the local supermarket car park.

Only those whose recyclable materials are collected by a waste management company or local council have to pay for this service. For the rest, where materials are backhauled to an RDC, the cost is covered by their franchise agreement.

As a result of the varying arrangements, 80% of stores we visited were confident that all of their cardboard packaging waste was recycled, while 69% believe that most of their plastic waste is recycled.

Temporary displays made from card used in symbol group stores are treated the same as other card waste and backhauled to depot. This was the case in 31% of those we visited. A small number of stores, 11%, said they try to reuse displays and, if that is not possible, they recycle them locally. Of the remaining 50% of stores, half try to break displays down for recycling, and if they cannot, they go in general waste. The remainder said displays go straight into general waste without any attempt to recycle them.
Waste management company research

We conducted interviews with senior waste management executives to explore the challenges they face handling the recycling of materials from the retail industry. We also asked them what retailers and POSM suppliers could do to help.

How efficient are the UK and Ireland at recycling?

The UK’s recycling rates are very high across all sectors. Overall recycling rates for paper, cardboard and plastic are in the percentage range of high 80s to low 90s.

However, there are probably only 10 large recycling mills across the UK, with a maximum of five capable of handling plastic. The infrastructure works well but only as a ‘cottage industry’, without the capability to complete the whole process.

Perhaps surprisingly, given the widespread emphasis on sustainability, there has been no significant investment in the UK recycling infrastructure in the last 30 years. This is why about 80% has to be exported to be processed. The main destinations for the UK’s recycled materials are Europe and Asia Pacific.

Ireland’s recycling infrastructure is on a par with the UK’s and it also has to export most of its materials to complete the recycling process.

What inhibits recycling of materials?

The most common thing preventing recycling is mixed substrates in the same product. Plastic and Velcro strips have to be physically removed by staff at the recycling mill, which costs time and money. Likewise, magnetic strips also need to be removed manually, reducing the value of the recycled material due to the extra labour involved.

Fortunately, many more displays are now made from a single substrate and if not, they have been designed to be easily disassembled.

Although up to 5% of contaminants are allowed, recycling mills can be notoriously picky. For example, if they see some plastic in the first couple of bales, they may reject the entire container. In this instance, the cost of rerouting and disposing of the material is borne by the ‘supplier’ e.g. the retailer. So instead of receiving £40 to £50 income per bale, they will have to pay for landfill or incineration instead.

Following WEEE regulations, LEDs have to be physically removed and disposed of, treated as hazardous waste. They cannot be left attached to any other materials for recycling.

Are there any particular materials that are difficult to recycle or are not recyclable?

Lamination will devalue recycled material by 15% to 20%, so it ideally needs to be delaminated before pulping. Laminated card is technically possible to recycle but there is nowhere in the UK that will do this. It needs to be sent to mills in India or the Far East.

Multi-polymer materials can be continuously recycled back into multi-polymer materials in a closed loop system. However, this is the only way to recycle them. The only other choice at end of life is landfill or incineration.

Waterproof card can also be somewhat problematic to recycle, as pulping with water is part of the recycling process.

Conversely, are there any processes or materials that do not actually cause recycling issues?

Printing is not an issue for recycling. Also, most adhesives do not present problems if they constitute less than 3% of the material being recycled.

Why is PVC demonised in the display industry?

PVC is recyclable but there is little infrastructure in the UK to do this. It is actually quite easy to recycle as long as it is a single type of PVC e.g. there is no problem recycling Foamex which has self-adhesive PVC attached to it.

However, there are often issues as many applications of PVC tend to have other materials incorporated, such as metal ringslets in PVC banners.

PVC degrades during the recycling process so virgin PVC has to be added when making ‘new’ material.

We also visited a national waste management company’s recycling centre and that of a high street retailer.

The retailer depot visit revealed that a high percentage of material returned to the depot had not been segregated. Some even had product mixed in. As the sorting process is done entirely by hand, the lack of segregation at stores complicates the sorting process at the depot, impacting efficiency.

Further examination revealed that every roller cage collected from stores had completely different contents, ranging from cardboard packaging boxes, metal shelves, metal permanent displays, acrylic displays, returned retail products, cardboard temporary displays, electrical equipment and plastic wrapping.

Some cages had unused cardboard POSM units which had never been used in-store.

Few of the cardboard boxes sent back had been flattened, resulting in a significant amount of wasted space in vehicles backing up materials from stores to the depot. All cardboard including signage, shelf trays, shelf wobbler and fins were baled with all the outer packaging boxes and sent for recycling together.

Frustratingly, all the signs were there that the instructions and protocols issued to stores have been largely ignored.

Although sorting appears largely effective, the overall system is inefficient resulting in the retailer losing time and money.
Understanding the recycling chain

The primary role of packaging is to protect the product and the POSM is to display the products. However, where possible both packaging and POSM should be designed in a sustainable way that minimises the environmental impact, uses the minimal amount of fibre, eliminates plastics where possible and is 100% recyclable at the end of life.

There is a well-defined ‘Waste Hierarchy’ which was part of the EU framework directive in 2008 and is still relevant today. The Waste Hierarchy has now been incorporated in UK law, via the Waste (England & Wales) Regulations 2011. This begins with waste prevention and minimisation, moving on to reuse, recycling, energy recovery and finally, disposal.

Recycling is paramount at the end of life for any packaging or POSM. Compromised materials are less likely to be recycled or can end up in landfill.

To maximise the opportunities for recycling, it is important to understand the recycling chain. From back-of-store sorting, waste packaging and POSM is collected by waste recycling companies and taken to material recovery facilities (MRFs). Here, materials are separated into individual streams like paper, cardboard, plastics, metals etc. They are then baled and sent to reprocessing centres for plastics or pulp mills for paper and cardboard.

It is important to understand the difference between these terms:

- **Recyclable** means the material must be able to be collected, sorted, reprocessed and manufactured into a new product.
- **Easily recyclable** means the material can be collected and processed as part of the majority of kerbside waste collections.
- **Recycled content** means that the item includes recycled material or a percentage of recycled material.
- **Compostable** means the material can be broken down into water, carbon dioxide and other materials within a defined period of time. This is normally through industrial processes and requires these materials to be identified and segregated from normal plastics.
- **Home compostable** means the material can fully decompose in soil so can compost at home or be disposed of in household food waste collections.

**Paper, cardboard and plastic with recycled content — what does this actually mean?**

For paper, cardboard and plastics featuring the words 'containing recycled content', this actually means the process of manufacturing this 'new' material must use paper, cardboard and plastics which have been recycled from previously used materials.

Products that contain recycled content are not necessarily recyclable. However, it is possible to have a material that is both recyclable with recycled content e.g. paper with 30% recycled content. Recycled content itself is defined as the proportion, by mass, of recycled material in a product or packaging. Only pre-consumer and post-consumer materials can be considered as recycled content.

**Recycling packaging and display**

There are some simple design tips that can be followed to help brands and retailers increase their opportunities to increase their recycling rates.

Before we look at these, we need to understand the paper and fibre recycling process.

- Materials arrive at the paper mills or pulping facilities in large bales where they are fed into the hydro-pulpers
- Here, they are mixed with warm water
- As they are pulped the contaminants are filtered out, such as any plastics laminates, clips, ticket strips, tapes, adhesives etc. The mills have an acceptable level of contaminates, usually 5%.
- Once separated the contaminates are sent off for disposal
- The pulp may now become a constituent part of recycled paper, cardboard or display boards.
**Top tips**

- Try to avoid using additional self-adhesive labels, multi-layered laminates and PVC components in packaging. Even compostable, biodegradable and oxy-degradable plastics can create huge issues for waste management and recycling companies.

- There are also design elements that can decrease the chances of display being recycled at the end of life. Things like ink, laminates, foils, glue and plastics all create challenges for recycling, such as increasing the costs or reprocessing and waste management.

- For POSM, try to avoid UV inks and varnishes. Single-sided laminates are OK but double sided can present problems.

- Use water soluble glues rather than hot melt, and minimise the glued elements to allow for easier separation.

- Metallics films or foils can block or clog machinery, so where possible eliminate plastic shelf clips and adhesive on the side cladding of FSDUs, and replace plastic shelf trays and ticket strips with fibre-based materials.

If we follow these simple steps in design, production and distribution, once these packaging and POSM products have come to the end of their campaign life, they can then be recycled.
Conclusions

It is clear that sustainability and recycling are important to the industry now and will become even more important over time.

However, when we move to the specifics of POSM recycling, this seems to be a focus only for those directly responsible for it, not in the wider organisation or at senior level, and some brands are still formulating their policies for POSM.

There is a unanimous belief that retailers are ultimately responsible for POSM and packaging recycling, but training for store staff can be inconsistent, with enforcement often an issue.

In general, clients rely on their suppliers for design and technical expertise, which can add levels of confusion given the number of suppliers used. While dialogue is already in place between POSM suppliers and the majority of brands and half of retailers regarding the sustainability of POSM display, the specifics vary significantly. Most POSM client companies assess their supplier’s sustainability credentials as part of their selection processes, the requirements are often inconsistent.

Understanding on the issue of recycling is also extremely varied. Almost everyone thinks that all cardboard is recycled, but specifics on the amount of POSM recycled were hazy. The majority of those responsible for commissioning POSM do not know if its recycling provides a positive revenue stream, and value of recycled materials is not therefore always taken into consideration when specifying displays. There is inconsistency and in some cases lack of understanding of the sustainable and recyclability credentials of materials used on behalf of those who commission POSM. Meanwhile, brands have little or idea how much of their POSM is recycled.

Although the UK and Ireland have a high recycling rate, this is really just restricted to material segregation, with the majority of recyclable materials being sent abroad for processing. Many independent retailers are reliant on their waste management partners or local councils for the segregation of mixed dry waste and its subsequent recycling.

Recycling instructions can often be patchy, with few suppliers offering instructions for their displays, despite the widely held belief that this is the best opportunity to improve recycling rates.

It seems that intentions are good. Sustainability and recycling are high on the agenda for most retailers, brands and suppliers. However, drilling down to the specifics of recycling POSM revealed that this there is much work ahead to make real inroads in this area.
Recycling Glossary

3Rs — (Sustainability) reduce, reuse, recycle.

4Rs — (Sustainability) reduce, reuse, recycle, recover. Sometimes also "renew," or "rot" (as in composting and making biogas).

5Rs — (Sustainability) reduce, remanufacture, reuse, recycle, recover. Or refuse, reduce, reuse, recycle, restore.

Bale — A compacted and bound cube of recycled material. Most commonly cardboard, paper or plastic.

Bailer — Equipment used to bind a compacted cube or block of recyclable material, such as cardboard.

Biodegradation — Something that breaks down into natural materials in the environment.

Business waste — Any waste that comes from a commercial activity.

Circular economy — A systemic approach to economic development designed to benefit businesses, society, and the environment. In contrast to the ‘take-make-waste’ linear model, a circular economy is regenerative by design and aims to gradually decouple growth from the consumption of finite resources.

Commingled recyclables — A mixture of several recyclable materials into one container.

Compactor — Machinery designed to crush waste and reduce the amount of space taken within a waste receptacle.

Compostable — Something is compostable if it is capable of disintegrating into all-natural elements in a compost environment, such as an industrial compost site. When the item is fully composted, it will have left no toxic residue in the soil.

Contamination — Waste that affects the quality or ability of other materials to be recycled. For example, food residue left in recyclable containers is contamination and in large quantities can cause a whole collection to become contaminated and unrecyclable.

Closed loop — Closed loop recycling is the process by which waste is collected, recycled and produced to make something new. Effectively, the waste does a full circle without having a negative impact on the environment.

Cradle to cradle — A term used in life-cycle analysis to describe a material or product that is recycled into a new product at the end of its life, so that ultimately there is no waste.

Cradle to grave — A system that manages solid waste from creation to disposal. In product design, it refers to its creation from raw or recycled materials through manufacturing, use, consumption and disposal.

Degradable — Most materials are degradable given sufficient time. However unlike biodegradable or compostable materials the manner in which many things degrade can be harmful to the environment. For example, plastics will degrade, but over the course of hundreds if not thousands of years. They continuously break down into smaller pieces when subject to the elements.

Disposable — Consumer items and packaging designed for single or few uses. Disposable items are not necessarily unrecyclable.

Diversion rate — The percentage of waste materials diverted from landfill.

Drums — Waste container for the segregation of hazardous waste, including liquid (oils, paints, etc.) solid (oily rags, batteries, etc.) and aerosols.

Dry Mixed Recycling (DMR) — Dry recyclable material typically consisting of plastic, cardboard, paper and glass, often collected in a comingled service. The mixed waste is often taken to a Materials Recycling Facility (MRF) where it is separated and recycled into separate streams. Food, liquid or general waste should not be placed in a DMR collection service. See contamination.

eCycling (electronics recycling) — The reuse or recycling of end-of-life electronic materials.

Energy-from-waste (EFW) — An energy recovery process that generates renewable power in the form of electricity, heat or transport fuels from the controlled incineration of residual waste. An EFW plant contributes towards carbon emissions reductions and the reuse and recycling of materials that would otherwise go to landfill.

End users — A business or manufacturer that takes recyclable materials and converts them into new products, excluding products for re-use or combustion for energy recovery.

General waste — Also called residual waste, general waste cannot be recycled. It usually includes materials such as non-recyclable plastics, food waste (where separate collections are not available) and wrappers.

Hazardous waste — Waste that contains substances or has properties that might make it harmful to human health or the environment. Usually needs specialist disposal from a licenced hazardous waste carrier.

Industrial waste — Rubbish from any buildings occupied by a factory or industry. See business waste.
Glossary continued

**Landfill** – Used for the disposal of unrecyclable waste and refuse where no other waste process can be utilised. Waste is buried in excavated pits which are usually covered with soil once full.

**Landfill tax** – An environmental tax paid on top of standard landfill rates, intended to encourage alternative means of waste disposal, such as recycling and other forms of waste treatment.

**Life Cycle Assessment or Analysis (LCA)** - The measurement of the environmental impacts of a product or material from its origin through to disposal i.e. across its entire lifecycle. All activities or processes during the lifecycle of a product result in environmental impacts due to consumption of resources, emissions of substances into the environment as well as other exchanges. LCA’s also include the disposal or recycling of materials at end of life.

**Mandate recycling** – Programs that by law require certain recycling practices or results.

**Materials Recovery Facility (MRF)** – A materials recovery facility or materials reclamation facility is a specialised recycling plant that receives, separates and prepares recyclable materials for marketing to end-user suppliers.

**Mixed or commingled recycling** – A mixture of several recyclables in one container, such as plastics, paper, metal and/or glass, as opposed to collecting and storing each material separately.

**Multipolymer** – A material composed of multiple polymers *(see polymer right)*.

**Natural recycling** – A process by which organic material decomposes in nature, such as leaves decomposing in a forest.

**Non-recyclable** – Cannot be recycled.

**Oxo-degradable** – Plastics are made of petroleum-based polymers, usually polyethylene that contain additives (usually metal salts), which accelerate their degradation when exposed to heat and/or light.

**Packaging** – Packaging is the term used for the material or method of packing a shipment that provides appropriate protection during transportation.

**Pre-consumer materials** – Recovered materials obtained from suppliers, such as cutting scraps from printers. Waste generated before the product reaches the consumer.

**Pre-cycle** – To reduce waste at the source by changing buying habits.

**Packaging Recovery Note (PRN)** - A type of document that provides evidence waste packaging material has been recycled into a new product. PRN’s can be issued by accredited reprocessors when they have recovered and recycled a tonne of packaging material. The accredited reprocessor can sell the PRN to obligated companies or compliance scheme who use the PRN to prove that packaging material has been recycled on their behalf, or their members’ behalf.

**Plastic Recycling Facility (PRF)** – A facility that sorts mixed plastic items into streams of plastic resin types.

**Polymer** – Any of a class of natural or synthetic substances composed of very large molecules, called macromolecules, that are multiples of simpler chemical units called monomers.

**POSM** – Point-of-sale materials.

**Post-consumer recycling** – The reuse of materials generated from residential and commercial waste, excluding recycling of material from industrial processes that have not reached the consumer, such as glass broken in the manufacturing process.

**Post-industrial** – Scrap material generated as a result of an industrial manufacturer process.

**Pre-consumer** – Materials reused/recycled before they go to market, such as paper scraps and offcuts generated during the manufacturing process.

**Producer responsibility** – Making sure businesses that manufacture, import and sell these products are responsible for their end of life environmental impact.

**Primary packaging (sometimes referred to as consumer or retail packaging)** – Packaging which is in direct contact with the product itself.

**Primary materials** – Virgin or new materials, such as wood pulp used in making products.

**Producer responsibility** – Making sure businesses that manufacture, import and sell these products are responsible for their end of life and environmental impact.

**Pulp** – A soft, moist, sticky mass of fibres made up of wood, straw, etc., and used to make paper and paperboard.

**Reuse** – Reuse is a term for using an item more than once. This includes conventional reuse where the item is used again for the same function, and new-life reuse where it is used for a new function.

**Recovered material** – Material that would have otherwise been disposed of as waste or used for energy recovery, but has instead been collected and recovered (reclaimed) as a material input thus avoiding the use of new primary materials.

**Recovery rate** – The recovery rate is the percentage of materials consumed that is recovered for recycling.
Glossary continued

Recycling – Recycling is the reprocessing of old materials into new products, with the aim of preventing the waste of potentially useful resources, reducing the consumption of fresh raw materials, reducing energy usage, reducing air and water pollution by reducing the need for “conventional” waste disposal, and lowering greenhouse gas emissions as compared to virgin production. Changing the physical structure and properties of a waste material that would otherwise have been sent to landfill, in order to add financial value to the processed material, may involve a range of technologies including composting, anaerobic digestion and energy from waste technologies such as pyrolysis, gasification and incineration.

Recyclables - Products or items that can be reprocessed for the purpose of manufacturing new products. The most common recyclable materials are paper, aluminium, glass and plastic containers.

Recycled content – The amount of a product’s weight or package’s weight that is composed of materials that have been recovered from waste. Recycled content may include pre-consumer and post-consumer materials.

Recycled water – Treated storm water, greywater or black water suitable for uses like toilet flushing, irrigation, industry etc. It is non-drinking water and is indicated using a lillac non-drinking label.

Recycling centre – Drop-off sites that accept recyclables. Some sites also accept household waste providing a one-stop services.

Recovery – Recovery is a term used within the waste and recycling industry as a way of diversion from disposal or landfill.

Refuse – A general term for rubbish; it can refer to both general waste as well as mixed waste types from both households and businesses.

Reprocessor – A company who recycles materials, only accredited reproprocessors can issue PRNs.

Reuse – The second pillar of the waste hierarchy - recovering value from a discarded resource without reprocessing or remanufacture e.g. clothes sold though opportunity shops strictly represent a form of re-use, rather than recycling.

Secondary packaging – Is that which primary packaging goes into or onto, or is wrapped in e.g. pallets or shrink wrap.

Single stream recycling (SSR) – A system where all kinds of recyclables are put into separate bins by consumers, domestic or commercial. The most common waste types for this service are plastic, paper, food, metal, card and wood. Diverting all of a businesses’ single stream waste to recycling, reduces costs though avoiding landfill tax.

Source separation – Separation of recyclable material from other waste at the point and time the waste is generated, i.e. at its source. This includes separation of recyclable material into its component categories, e.g. paper, glass, aluminium, and may include further separation within each category, e.g. paper into computer paper, office whites and newsprint. The practice of segregating materials into discrete materials streams prior to collection by or delivery to reprocessing facilities.

Sustainability – Avoiding the consumption of natural resources in order to maintain an ecological balance. Meeting the needs of the present without compromising the ability of future generations to meet their own needs.

Types of Waste:

Post-industrial (i.e. Factory Waste) – Waste generated in a factory during the manufacturing process, often in the form of product scrap, trim, overruns, punch-outs, or other processing waste.

Pre-consumer (i.e. Factory Waste) – Material diverted from the waste stream during a manufacturing process. Excluded is re-utilisation of materials such as rework, regrind or scrap generated in a process and capable of being reclaimed within the same process that generated it. Recycled plastic from ‘pre-consumer materials’ is only acceptable if it has been treated by a separate reprocessing facility.

Post-consumer – Material generated by households or by commercial, industrial and institutional facilities in their role as end-users of the product, which can no longer be used for its intended purpose. This includes returns of material from the distribution chain.

Upcycling – Upcycling means to use a certain material again, but in a manner different than what it was originally intended for. The original product is left mostly intact, utilizing its shape, form, and material for a different purpose. Examples include using car tires as swings or playground elements, using corks to make a cork board, or using shipping pallets to make furniture or interior design elements.

UV ink – Ink that dries through a photo mechanical process rather than being absorbed.

Virgin materials – Materials which are gathered from the environment in their original, raw form.
**Glossary continued**

**Waste** – An unwanted material or substance, also known as rubbish or junk.

**Waste Electrical and Electronic Equipment (WEEE)** – Electrical items such as televisions, computers, kitchen appliances, hairdryers and batteries that have reached the end of their useful lives. WEEE needs specialist disposal and should not be put into general waste or recycling bins.

**Waste Hierarchy** – Ranks waste management options according to what is best for the environment.

**Waste stream** – The total flow of solid waste from homes, businesses, institutions and manufacturing plants that is recycled, burned or disposed of in landfills, often broken into different waste stream types.

**Waste-to-energy facility** – A facility where recovered municipal solid waste is converted into a usable form of energy, usually via combustion.

**Wishcycling** – Also known as aspirational recycling, wishcycling is when consumers place questionable items in recycling bins in hopes of them being recycled, leading to an array of problems in the recycling process.

**WRAP** – Waste and Resources Action Programme is a UK based non-profit recycling advocate. It works with businesses, individuals and communities to achieve a circular economy, by helping them reduce waste, develop sustainable products and use resources in an efficient way.

**Sources**

BBC  
Citizens Information.ie  
GOV.UK  
letsrecycle.com  
Repak.ie  
resource.co  
Shoppercentric  
The Retail Bulletin  
retailtimes.co.uk

**Disclaimer**

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.
Appendix A – Regulatory Guidance

Guidance to Recycling and Waste Disposal in the UK & Ireland in Relation to P-O-P Materials

Introduction
This document aims to provide guidance for the recycling and disposal of P-O-P materials at end of life. As such, the scope is restricted to materials which are commonly used in the production of both temporary and permanent P-O-P displays. It is not a definitive list of legal requirements but will hopefully provide guidance and direction to the relevant legislation and directives where further information can be found.

Overview
Anybody who generates, stores, works with, and disposes of waste is bound by the duty of care. Even if a business outsources its waste to a waste management company, the burden rests on the business owner to ensure that this waste is being dealt with responsibly.

Regulations, irrespective of country, principally focus on:

- The correct sorting and storage of your business waste.
- Correct business waste disposal.

There are some basic best practice principles which will help businesses cope more efficiently with recycling and waste disposal procedures:

- Separate waste into different categories and store this in clearly labelled containers.
- Do not allow contamination between different types of waste.
- Ensure the containers are suitable for the task and do not allow leaking, seeping, overflowing, or any form of escaped waste.

- Whether you dispose of your waste yourself or through a waste management company, a waste transfer license will be necessary.
- The onus rests on the business owner to ensure that any waste management company they work with is licensed.
- The landfill or recycling facility used for the disposal of business waste must be licensed to dispose of the waste.

Whilst many of the regulations surrounding recycling and, in particular waste disposal, are based on European Union (EU) legislation, the guidance and regulations provided by the UK and Ireland Governments differ (as do those between the English, Northern Ireland, Scottish and Welsh Parliaments).

Recycling
Unlike waste disposal, rules and procedures governing commercial waste recycling are determined by individual recycling and waste management companies depending on their processes and capabilities. However, UK Waste Regulations do require businesses to separate their recyclable materials (paper, glass, plastic etc.) from general waste. This has been to reduce the impact on landfill sites and for the sake of the environment. Government waste policy is predicated on a system of waste hierarchy intended to urge consumers to consider prevention, re-use, and recycling before disposal.

A recycling company should typically be able to:

- Take care of all an organisation’s commercial recycling needs.
- Provide expert advice on how to store and organise waste before collection, including access to recycling bins.
- Ensure that materials for recycling are safely collected, transported, and disposed of in an environmentally friendly manner.

It should also be remembered that there are options available to companies that can reduce and/or make it easier to recycle materials.

- **Refuse** – only use materials that can damage the environment and are not easily recyclable.
- **Reduce** – when using potentially environmentally damaging materials is unavoidable, try to minimise the amount used and only buy what is needed, when it is needed, to avoid creating a surplus of damaging materials.
- **Reuse** – where practicable reuse products rather than disposing of them after a single use.
- **Repurpose** – find alternative uses for a product that would otherwise be thrown away.
- **Recycle** – the final step of the process, whereby an item is taken to a recycling plant to be given a new lease of life.
Appendix A continued

United Kingdom
Resources Supporting Waste Reduction and Recycling

WRAP [https://wrap.org.uk/](Waste & Resources Action Programme) is a British registered charity funded by various UK Government departments and works with a wide range of UK and global organisations to deliver practical solutions to improve resource efficiency around the world.

Included in these are major UK retailers and global FMCG brands, who are working with WRAP to achieve common targets such as:

- **The Courtauld Commitment 2025** [https://wrap.org.uk/taking-action/food-drink/initiatives/courtauld-commitment-2025], WRAP’s ten-year commitment to make food & drink production and consumption more sustainable.

- **The UK Plastics Pact** [https://wrap.org.uk/taking-action/plastic-packaging/the-uk-plastics-pact], which brings together businesses from across the entire plastics value chain with UK governments and NGOs to tackle the scourge of plastic waste.

- **The UK Food Waste Reduction Roadmap** [https://wrap.org.uk/taking-action/food-drink/initiatives/food-waste-reduction-roadmap], helping food businesses take targeted action to reduce waste in their own operations, their supply chain and from consumers in support of the UN's Sustainable Development Goal 12.3.

- And for the fashion industry the **Sustainable Clothing Action Plan 2020 and Textiles 2030** initiative.

Converting Waste into Non-Waste Products

Under UK Government legislation it is possible to convert waste products into non-waste materials which are not then subject to waste controls. Protocols for achieving this (by material type) apply in England, Wales and Northern Ireland, based on EU regulations that have been retained in UK law post-Brexit. Of these, only the ‘non-packaging plastics’ quality protocol is likely to apply to P-O-P materials. An overview of converting waste into non-waste products can be found at [https://www.gov.uk/government/collections/quality-protocols-end-of-waste-frameworks-for-waste-derived-products](https://www.gov.uk/government/collections/quality-protocols-end-of-waste-frameworks-for-waste-derived-products) and details of the non-packaging plastics quality protocol at [https://www.gov.uk/government/publications/non-packaging-plastics-quality-protocol](https://www.gov.uk/government/publications/non-packaging-plastics-quality-protocol)

Waste Disposal

The UK Government provides several guidelines on the storage and disposal of commercial waste, which is defined as ‘any waste that comes from a commercial activity’.

A company that generates commercial waste has certain responsibilities under UK law:

- Keep waste to a minimum by doing everything you reasonably can to prevent, reuse, recycle or recover waste (in that order).
- Sort and store waste safely and securely.
- Complete a waste transfer note for each load of waste that leaves your premises.
- Check if your waste carrier is registered to dispose of waste.
- Must not allow the waste carrier to dispose of your waste illegally (and must report them to Crimestoppers if they do).

If a company wishes to regularly dispose of its own waste then it must register as a waste carrier. Details on how to do this together with more government advice can be found at [https://www.gov.uk/managing-your-waste-an-overview](https://www.gov.uk/managing-your-waste-an-overview)

Waste Transfer Notes

Each load of non-hazardous waste removed from a business premises, needs to be accompanied by a waste transfer note or a document with the same information, such as an invoice, your business and the business taking your waste both need to:

- Fill in the sections of the waste transfer note that apply to you.
- Sign it.
- Keep a copy for 2 years.
- Show it to an enforcement officer from your local council or the Environment Agency if asked.

Details on how to register online and to download a waste transfer note can be found at [https://www.gov.uk/managing-your-waste-an-overview/waste-transfer-notes](https://www.gov.uk/managing-your-waste-an-overview/waste-transfer-notes)

Classification of Waste

The UK Government divides waste into five different categories. Of these, two are applicable to P-O-P:

- Packaging waste and recyclables; principally plastic, metal, paper and cardboard, glass and textiles. These are then further categorised as hazardous and non-hazardous depending on the nature of their use. See [https://www.gov.uk/how-to-classify-different-types-of-waste/packaging-waste-and-recyclables](https://www.gov.uk/how-to-classify-different-types-of-waste/packaging-waste-and-recyclables) for further details.
- Electronic and electrical equipment - The relevant classification code needs to be included in documentation accompanying waste electrical and electronic equipment (WEEE), such as batteries, lightbulbs, televisions and other electrical devices. Additionally, WEEE often has components that contain hazardous substances or persistent organic pollutants (POPs). Examples of POPs can range from printed circuit boards to insulation foam. Full details on the disposal of WEEE are provided at [https://www.gov.uk/how-to-classify-different-types-of-waste/electronic-and-electrical-equipment](https://www.gov.uk/how-to-classify-different-types-of-waste/electronic-and-electrical-equipment)
Appendix A continued


WEEE including Batteries

If P-O-P equipment contains portable batteries then the provider of the P-O-P equipment is a distributor of batteries. As such they must:

- Take back waste portable batteries at no charge.
- Inform end-users about the possibility of such take back at the distributor’s sales points.

A distributor may not:

- Make any charge to end-users.
- Oblige end-users to buy a new battery.


Hazardous Waste

Extra responsibilities apply if you are storing or disposing of hazardous waste. Of the materials listed as hazardous, only batteries are likely to have been used in P-O-P applications, or possibly, in the case of fridges, equipment containing ozone depleting substances. For a full list of hazardous materials and how they need to be dealt with visit [https://www.gov.uk/dispose-hazardous-waste].

N.B. differences exist in legislation and practices across England, Northern Ireland, Scotland and Wales. For more details consult GOV.UK at [https://www.gov.uk/topic/environmental-management/waste] and follow the link to the relevant section.

Dispose of waste to landfill

Responsibility for the correct procedures for waste disposal to landfill will usually rest with the waste management company, remembering that companies should not allow their waste carrier to dispose of their waste illegally.

Guidance on disposal of waste to landfill is available at [https://www.gov.uk/guidance/dispose-of-waste-to-landfill].

Landfill Tax

UK Landfill Tax, like that levied in other countries, is aimed at making other more environmentally friendly forms of disposal more attractive. Landfill Tax forms part of the total gate fee.

The amount of tax levied is calculated according to the weight of the material disposed of and whether it is active or inactive waste. The latter is principally materials used in a building’s fabric, whilst active waste will include some typical P-O-P materials, like wood and plastics.

In the UK and Northern Ireland inactive waste is charged at a ‘lower rate’ with active waste being charged at a ‘higher rate’. These rates were amended on 1st April 2021:

<table>
<thead>
<tr>
<th>Material sent to landfill</th>
<th>Rates from 1 April 2020</th>
<th>Rates from 1 April 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard rated</td>
<td>£94.15 per tonne</td>
<td>£96.70 per tonne</td>
</tr>
<tr>
<td>Lower rated</td>
<td>£3.00 per tonne</td>
<td>£3.10 per tonne</td>
</tr>
</tbody>
</table>

More details of the Landfill Tax as it applies to England and Northern Ireland can be found here at [https://www.gov.uk/topic/business-tax/landfill-tax].

More details of the April 1st changes can be found at [https://www.gov.uk/government/publications/changes-to-landfill-tax-rates-from-1-april-2021/changes-to-landfill-tax-rates-from-1-april-2021].

Scotland and Wales took control of their own Landfill Tax arrangements in 2015 and 2018 respectively. Specific details of each can be found at:

Scotland: [https://www.gov.scot/policies/taxes/landfill-tax/].
Wales: [https://gov.wales/landfill-disposals-tax/].
Appendix A continued

Republic of Ireland

Resources Supporting Waste Reduction and Recycling

REPAK [https://repaik.ie/] – not for profit organisation which operates a voluntary agreement with the Irish Government to promote, co-ordinate and finance the collection and recovery of packaging waste.

WEEE Ireland [https://www.weeeireland.ie/] - not for profit organisation delivering cost effective end of life management for electrical and electronic products including those from manufacturers and retailers.

Waste Management

Ireland’s waste management regulations are based on both the EU waste directives and Ireland’s own regulations.

EU Waste Directives

The range of EU Directives dealing with waste management include the Integrated Pollution Prevention and Control Directive (1996/61/EC) as well as specific directives dealing with different aspects of waste management.

Waste Framework Directive

The Waste Framework Directive (Directive 2008/98/EC on waste [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32008L0098]) sets down basic requirements for handling waste and defines what is meant by “waste”. It provides that EU member states must:

- Establish an integrated and effective network of waste disposal plants, prepare waste management plans, ensure that those who store waste handle it properly, and ensure that waste treatment operations are licensed
- Require waste collectors to have special authorisation and to keep records
- Carry out inspections of companies involved in waste collection or disposal
- Undertake periodic inspections

These Directives are implemented in Ireland by the Environmental Protection Agency Act 1992, the Waste Management Act 1996, the Waste Management (Amendment) Act 2001 and the Protection of the Environment Act 2003. Waste policy and legislation are implemented largely by the Environmental Protection Agency (EPA) and the local authorities.


Whilst the EPA is responsible for the overall direction of policy it is local authorities which are responsible for:

- Authorisation and control of commercial waste collection activities
- Authorisation of waste exports and monitoring of internal movements of hazardous wastes
- Waste permits for small-scale recovery and disposal activities
- Ensuring adequate waste collection, recovery and disposal arrangements in their areas
- Monitoring and inspection of waste activities generally

The Waste Management Act (1996) established a legislative basis for Producer Responsibility Initiatives (PRIs). Essentially, PRIs allow product producers to develop schemes that fulfil the basic objectives of waste management legislation. This means that the products they produce are disposed of in a responsible fashion, which complies with current government policy. The principal PRIs in Ireland are:

The Single Use Plastic (SUP) Directive 2019

The Single Use Plastic (SUP) Directive 2019 also forms part of the EU’s Plastic Strategy, and will be transposed into Irish Law by 5 July 2021. The main aim of the SUP is the reduction of the impact of certain plastic products on the environment, particularly marine litter.

SUP products are made wholly or partly from plastic and are typically intended to be used just once or for a short period of time before they are thrown away. The SUP Directive restricts certain items from being placed on the market where there is an alternative material available.

The following plastic items will be banned under the SUP Directive.

- Plastic straws
- Plastic cotton bud sticks
- Plastic cutlery
- Plastic plates
- Plastic stirrers
- Plastic balloon sticks
- Cups, food and beverage containers made of expandable polystyrene
- All products made of oxo-degradable plastic
Appendix A continued

The directive also outlines the following:

- Measures to reduce consumption of food containers and beverage cups made of plastic and specific marking and labelling of certain products.
- EPR schemes to cover the cost to clean-up litter (tobacco filters, fishing gear).
- The introduction of design requirements to tether caps to bottles.

Waste Electrical and Electronic Equipment (WEEE) and Battery Regulations

WEEE aims to promote the reuse, recycling and recovery of this material.

If batteries or any other type of electrical equipment e.g. LED lighting form part of a P-O-P display, then the retailer whose store in which the display equipment is merchandised is in effect a consumer of these items. As such the retailer is responsible for the recycling of this equipment through local civic amenities, or in the case of batteries through retailers who sell batteries.

Packaging

Packaging waste is a by-product of consumption by everyone; government, business, industrial users and the general public. Repak, an organisation set up to fund the recovery and recycling of packaging, was established to help businesses meet their legal obligations, as set out in the Waste Management (Packaging) Regulations 2007.

Sources


GOV.UK

Wrap.org.uk

Citizens Information.ie

Repak.ie

Disclaimer

This report has been compiled by POPAI UK & Ireland for use as guidance only, by those companies in the UK & Ireland recycling and disposing of materials commonly associated with point-of-purchase (P-O-P) display equipment and its manufacture. As such it does not attempt to cover the recycling or disposal of all materials that may be used in P-O-P display equipment and its manufacture. Nor should it be treated as definitive legal advice. Please also note that whilst every effort has been made to ensure the accuracy of the information contained herein on the date published, laws and regulations are subject to change.
Appendix B – Recycling Logos

Recycle
This label is applied to packaging that is collected by 75% or more of local authorities across the UK, for example plastic bottles.

Plastic resin codes
This identifies the type of plastic resin used to make the item by providing a 'Resin Identification Code'. It is represented with a 'chasing arrows' symbol surrounding a number between 1 and 7 that defines the resin used.

Recycle | Rinse
Rinsing packaging, for example food trays, ensures that any food residue does not contaminate other materials, particularly if they are collected together with paper.

Code 1: PETE (Polyethylene Terephthalate)
PETE plastic (or PET) is the most widely used form of plastic. In fact, around 70% of all plastic bottles and containers in the United Kingdom are made from PETE. Thankfully, it is widely recycled.

Recycle | Rinse | Lid/Cap on
Caps and lids under 40mm in diameter are too small to be captured for recycling. If you see this label, replacing the lid on the bottle ensures that it is captured and recycled with the main packaging component.

Code 2: HDPE (High-Density Polyethylene)
HDPE was typically used by those who work within the construction industry, as it was used to manufacture pipes. However, it is now also used to create containers such as milk cartons and cleaning product bottles. It is widely recycled.

Do not Recycle | Remove Sleeve/Film
You may see this request on packaging where film or liners can be easily removed via a perforated strip without needing to use a knife, pair of scissors or other tool. There should be clear instructions how to do so, e.g. Peel here.

Code 3: PVC (High-Density Polyethylene)
PVC, like HDPE, is typically used within the construction industry – to create products such as door and window frames. It is widely recycled.

Mobius Loop
This indicates that an object is capable of being recycled, not that the object has been recycled or will be accepted in all recycling collection systems. Sometimes this symbol is used with a percentage figure in the middle to explain that the packaging contains x% of recycled material.

Code 4: LDPE (Low-Density Polyethylene)
LDPE is often used to create plastic carrier bags and bin bags. Unfortunately, it is the most typically discarded form of plastic – with the word using around 500 million plastic bags each year – of which a small portion are recycled. Thankfully, there are now initiatives in place to recycle the products.
Appendix B continued

**Code 5: PP (Polypropylene)**
PP plastics are often used to create packaging, such as plastic tubs and containers, or drinks cartons. It can also be used to create furniture. This type of plastic can be recycled.

**Recyclable steel**
This symbol means that the product is made of steel.

All local authorities collect steel cans for recycling. Other steel or metal items can be taken to your household recycling centre.

**Code 6: PS (Polystyrene)**
Polystyrene is sometimes referred to as Styrofoam and is used predominantly within packaging, to protect fragile items from getting damaged. Polystyrene is not widely recycled and can pose a real threat to the environment.

**Waste electricals**
This symbol explains that you should not place the electrical item in the general waste. Electrical items can be recycled through a number of channels.

**Code 7: Other**
This section covers any type of plastic that does not fall within any of the above categories. It includes items such as fibreglass and acrylic plastic. Whether or not the items can be recycled varies.

**Compostable**
Products certified to be industrially compostable according to the European standard EN 13432/14955 may bear the 'seedling' logo.

Never place compostable plastic into the recycling with other plastics; as it is designed to break down it cannot be recycled and contaminates recyclable plastics. Plastics that carry this symbol can be recycled with your garden waste through your local authority.

**Glass**
This symbol asks that you recycle the glass container. Please dispose of glass bottles and jars in a bottle bank, remembering to separate colours, or use your glass household recycling collection if you have one.

**Home composting**
In addition to the seedling symbol for industrial composting, you may see this one which means that it is suitable to be home composted.

**Recyclable aluminium**
This symbol indicates that the item is made from recyclable aluminium.

**Paper, card and wood**
The Forest Stewardship Council (FSC) logo identifies wood-based products from well managed forests independently certified in accordance with the rules of the FSC.

**The Green Dot**
The Green Dot does not necessarily mean that the packaging is recyclable, will be recycled or has been recycled. It is a symbol used on packaging in some European countries and signifies that the producer has made a financial contribution towards the recovery and recycling of packaging in Europe.

**Tidyman**
This symbol from Keep Britain Tidy asks you not to litter. It does not relate to recycling but is a reminder to be a good citizen, disposing of the item in the most appropriate manner.
Appendix C – United Nations' Sustainable Development Goals

The Sustainable Development Goals (SDGs) or Global Goals are a collection of 17 interlinked global goals designed to be a "blueprint to achieve a better and more sustainable future for all". The SDGs were set up in 2015 by the United Nations General Assembly and are intended to be achieved by the year 2030. They are included in a UN Resolution called the 2030 Agenda or what is colloquially known as Agenda 2030. The SDGs were developed in the Post-2015 Development Agenda as the future global development framework to succeed the Millennium Development Goals which ended in 2015.

Whilst many of the 17 Sustainable Development Goals underpin the CSR policies of brands and retailers it is Goal 12, Responsible Consumption and Production which encompasses recycling as one of its 11 targets; 12.5 By 2030, substantially reduce waste generation through prevention, reduction, recycling and reuse.

https://www.un.org/sustainabledevelopment/
Appendix D – POPAI Sustainability Services

Recognising the global focus on sustainability

As an industry body, POPAI is committed to raising standards and has developed four key products, available to all sectors to establish a single, recognised standard to support, operate by and measure sustainability achievements.

POPAI’s Sustainability Vision

POPAI UK & Ireland is committed to reducing the industry’s impact on the environment. We recognise that the most effective approach to improving the sustainable performance of retail marketing is to work collaboratively throughout the supply chain.

We are committed to achieving this within the POPAI Sustainability Partnership, working with all parties in the value chain to achieve real and measurable reductions in our environmental impact.

POPAI Sustainability Standard – Supplier

Developed in direct response to calls from the industry for a standardised approach, the POPAI Sustainability Standard (PSS) embeds sustainability principles within organisations and challenges traditional practices by helping industry professionals better understand how, where and when sustainability issues translate to their business.

Sustain® the eco-design tool

Sustain® measures the environmental impact from the production of display and sales promotion items of all types. It includes supply chain, transport, componentry, processes, energy use and end of life.

Recommended by major brands and retailers.

POPAI Sustainability Partnership

This is specifically created to help brands and retailers reduce the environmental impact of all materials in store and to reinforce their sustainable credentials. It will include making commitments to the sustainability of your in-store activities and aligning your supply chain to fully reflect your values.

POPAI Sustainability Consultancy

Recognising the need for support across the industry, POPAI now provides a range of consultancy services in sustainability, including sustainability audits in store, sustainable design criteria, metrics and analysis of environmental performance, plus advice on procedures and practices, for both clients and suppliers.