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THE CHANGING FACE OF COMMERCIAL RECYCLING IN EUROPE (PART 2)

A research report into the 2020 pandemic's impact on commercial recycling.

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The prominence of recycling and sustainability has been growing since the 1970s. The ongoing interaction between scientists, innovators, legislators and manufacturers is a back and forth that sees industrial and regulatory changes as well as conceptual and procedural refinements.

As early as January 2019, countries in Europe were beginning to talk about whether they would meet their 2020 recycling goals. The UK in particular saw recycling rates fall to 44% ahead of the 50% target set for 2020 .

Part of the problem was that waste exported from European countries, recorded as recycled, wasn't being recycled in the target countries, instead being sifted for what was profitable with the remainder burnt or buried. As countries started to close their borders to foreign waste, the commercial sector was faced with a renewed need to recycle more waste within the country of origin.

Since the 1990s, homes across Europe have been provided with more recycling facilities and collections, while the commercial sector has seen changes not only in the sustainability of its waste but also of its manufacture and operations.

The development, implementation and refinement of commercial recycling and sustainability solutions are long-term, multi-decade processes. They are not the sole responsibility of any one group – businesses, manufacturers, authorities or scientists – and their interruption has the potential to derail progress.

There can be very few people whose day-to-day life has not changed in some way because of the COVID-19 pandemic. The same is true for businesses and the processes they undertake such as recycling and waste management.

To help businesses across all sectors understand the changes that have occurred, and their expected longevity, Rubbermaid Commercial Products (RCP) undertook a research study between July and September of 2020.

Our initial Love Recycling study, performed at the start of 2020, took a detailed look at important day-to-day waste management processes. With the increasing desire for sustainability in all facets of commercial activity, from businesses and consumers, the continental and nationally focussed reports we distributed were welcomed with great interest by European businesses.

Our second Love Recycling survey investigated the pandemic's effect on European businesses. This report presents findings on the disruptive effects those businesses felt between March and September and their recycling activities, outlook and intentions for the coming years.

We've worked with over 1,000 businesses as part of the Love Recycling Research Project. I would like to thank them for their time and allowing us insight into how businesses manage their recycling and waste processes. We look forward to working with more businesses as part of the project in the coming years.

If you'd like to learn more about how your business can develop its commercial recycling, visit lovereycling.com or contact us using the details at the end of this report.

¹ <https://www.bbc.co.uk/news/science-environment-46566795>

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COMMERCIAL RECYCLING BEFORE THE PANDEMIC



Since the turn of the millennium, businesses in all sectors have been experiencing changes in how they conduct their business. The vast expansion of the internet along with the digitisation of commerce across payment methods, currency and smart devices have all changed the way businesses operate.

This period has also seen an increasing desire from consumers and businesses for industrial practices to be less detrimental to the environment. Particularly amongst younger demographics, sustainability is a factor in the decision to purchase products or patronise brands. Businesses have begun to include recycling and sustainability policy within their messaging to customers.

The emergence of commercial recycling as a core component in these changes has been fundamental to supporting sustainability developments. Where natural resources can't be replenished, reusing materials extends the life of the natural resource.

We asked businesses about their recycling habits, what importance they placed on it, what their aims

were for their recycling activities and what impeded them from achieving more.

We discovered that recycling was important to businesses, but that their intentions were not always fulfilled by their actions. As impediments to doing more, anticipated cost increases and a deficit of good information were often cited.

Gaining an understanding of the state of commercial recycling in Europe is essential, both for seeing how far industries have come, but also how much further they want to go.

In March this year, the pandemic forced much of Europe into lockdown. Facilities were closed, staff were furloughed, transport networks were reduced to a minimum and the general advice was to stay indoors.

Waste collection agencies were faced with a reduced workforce and a tremendous spike in refuse from healthcare facilities. In April, the UK's NHS had orders placed for a billion items of PPE as consumption rates rose to 14 million items per day. Outside of a few specialised processing facilities, PPE waste cannot be recycled and is instead incinerated.

The disruption to commercial operations, including recycling and waste management, was felt across sectors and the businesses within those sectors, with little exception. How facilities have managed during that time and what they intend to do in the future is vitally important for the continued success and development of commercial recycling.

² <https://www.bbc.co.uk/news/business-52362707>

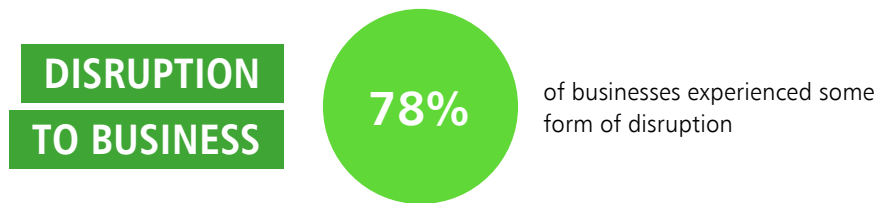


DISRUPTION DURING THE PANDEMIC



Disruption came in many forms. Facilities and venues closed while supply chains to essential grocery stores were disrupted and large-scale consumer purchasing left shelves empty.

The extent to which any business was disrupted by the pandemic varies across individual establishments and sectors, but the vast majority of businesses were disrupted in some way. There can be few businesses that were not touched by the need for staff and customers to confine themselves at home during nationally sanctioned conditions or as part of a self-isolation period.



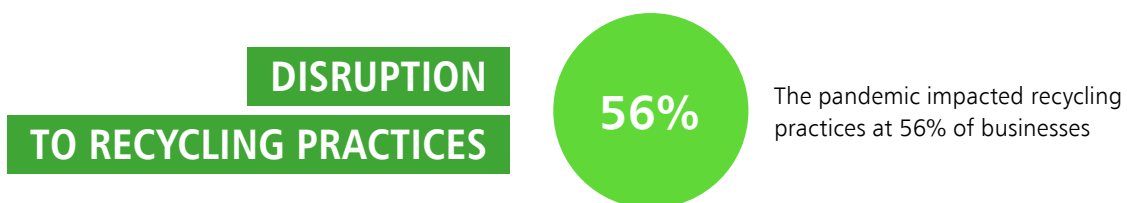
Within the segment of disrupted businesses, 8% suffered critical disruption. In the UK, 10% of businesses suffered critical disruption while in Germany and France the figures were 8% and 5% respectively. The two sectors with the highest experience of critical disruption were hospitality and healthcare. Two sectors that have been disrupted in very different ways.

“Disruption affected businesses whether they remained open or closed”

Hospitality venues such as hotels, were closed completely during lockdown and the majority of staff were unable to

work from home. With national and international travel severely restricted and prior bookings cancelled, many properties had no choice but to shut down completely for the duration of lockdown.

Healthcare establishments, such as pharmacies, care homes and hospitals, have experienced critical impact in a different way, through remaining open. With increased demand from those affected by COVID-19, alongside the need to triage the most serious cases that occur during normal operation, disruption has required both the restriction of some facilities and the vast expansion of others.



When we asked respondents what degree their recycling practices had been affected by the pandemic, more than half said there had been some degree of impact. Of those businesses that have experienced a greater degree of disruption, many respondents were from the retail sector.

Retail, as a sector, has been split between essential stores remaining open to serve the public, while the remainder have closed to comply with lockdown measures. Supermarkets and other grocery stores saw a surge in purchases during the initial phase of lockdown, leading to increased waste production at a time of reduced collections. Stores that have closed create no waste, a significant change from normal operations.



Chapter 3

THE IMPACT ON PRIORITIES



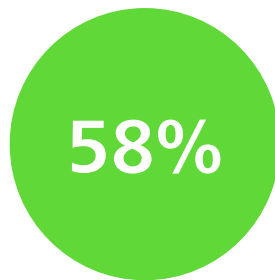
Disruptive change often has an impact on the priorities of those affected by it, to what degree have businesses had to change or adapt their priorities this year?

Business priorities, by their nature, have a chronological aspect. Those things of the greatest priority will be taken care of soonest. By engaging respondents and asking them to rank a series of priorities, both those related to standard business operation and pandemic conditions, we wanted to determine how existing priorities had shifted and where new priorities ranked.

“Commercial recycling remains important and businesses are committing more to it”

Within standard business priorities, those that existed prior to COVID-19, recycling still ranks as a top issue for businesses. Across all businesses

surveyed, recycling ranks as a higher priority than delivering consistent return to shareholders. In addition to this, 77% of businesses are planning to increase their spending on recycling solutions in the future indicating it is still a key priority.



**OF BUSINESSES SAID PROVIDING
HYGIENE PROVISIONS FOR STAFF
WAS A TOP THREE PRIORITY**

With staff safety a crucial part of resuming operations for many businesses, providing hand hygiene provisions for staff has taken immediate precedence over pre-existing considerations such as supply chain security.

While hand hygiene has been a prominent part of safety messaging since March, PPE items such as face masks were not given official prominence until later in the year as

more was learnt about COVID-19 and the ways in which it spreads.

This may explain why businesses rank hand hygiene provisions as such a high priority, while only 29% of business have dedicated containers for the isolation of PPE waste. This figure includes healthcare facilities which likely had PPE disposal in place prior to March 2020. If we remove those respondents, we find the figure drops to 20%.

Businesses have been flexible throughout lockdown, adapting to change that they have often had little time to plan for. The addition to their priorities of hand hygiene requirements has been one of these changes. Recycling, while it may not have been an active priority during the pandemic has continued to receive attention and, as we will see in the next section, remains prominent within commercial planning.



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Chapter 4

PLANNING BEYOND 2020



While health priorities have risen sharply during 2020, has this affected the importance of recycling for businesses and their future intentions?

Although our research indicates that pandemic priorities are most immediate for businesses, they remain engaged in the longer-term project of recycling with 90% of recipients stating that recycling either retains, or has increased, its importance in the wake of COVID-19

This perhaps reflects an understanding amongst businesses that recycling is a long-term project that occupies an integral part of ongoing operations.

86%

OF BUSINESSES SAY THEY WILL GIVE RECYCLING GREATER FOCUS IN THE COMING YEARS

When asked about a connection between the pandemic and their recycling intentions, 36% of businesses say they will recycle more as a direct result. There may be a number of factors causing this increase, a desire by businesses to catch-up on missed time, to exploit the disruption as an opportunity to install new processes or a renewed sense of the part that recycling plays in the health of the planet.

On this latter point, one of the communally uplifting facets of lockdown has been the visuals from around the world that show how different places are when they are not

being polluted by humans. City vistas in China free from the pollutant cloud that often characterises such views, the clear waters of Venice revealed for the first time in decades due to an absence of disruption.

To some degree, the intention of businesses to improve their processes is already manifesting in planning. A small but positive 10% of businesses confirmed their intention to install more bins after the pandemic.

While these findings indicate a prominent future for commercial recycling, the future is not without potential challenges.

“Businesses need help implementing and creating successful recycling”

Almost a quarter of businesses disagree that there is help available for businesses that want to recycle more. It is a fair assumption that these businesses want to implement or improve the recycling at their facilities but have found the provision of support and services to be lacking.

Additionally, those businesses that do undertake recycling processes face ongoing challenges.

72%

ADMITTED THAT THEIR CURRENT RECYCLING EFFORTS AREN'T ALWAYS SUCCESSFUL

When such a high proportion of businesses indicate that they fail to achieve the successful outcome they intend, it's clear that even once recycling is implemented, additional support is needed. Causes for this are likely mixed but could encompass a need for better provisioning within facilities, refined process development, staff education and better engagement. On this latter point, none of the businesses surveyed said they incentivise recycling activity.

The combination of businesses unable to find help getting started and those whose implemented methods aren't always successful, shows there are areas where businesses need more support with their recycling activities.



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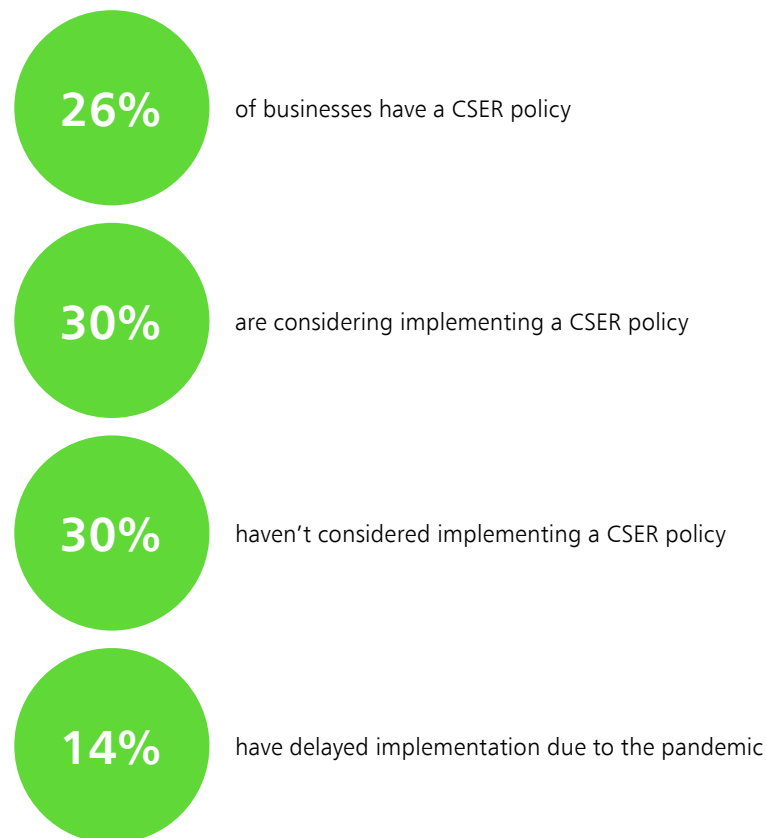


RECYCLING POLICIES



In addition to practical solutions that are implemented within a facility, the conceptual ideas and process that support commercial recycling and waste management also require ongoing development.

Corporate Social and Environmental Responsibility (CSER) is the process by which an organisation defines its sustainability ideals and how those ideals should be implemented. As part of their relationships with other entities, such as consumers, suppliers or distributors, it is a statement of intent that can often be the cornerstone of commercial transparency.



Slightly more than a quarter of respondents said their organisation had a CSER policy in place. In terms of predominant sectors, 21% of these organisations were healthcare, 15% retail and 14% hospitality.

While CSER policy statements are by no means mandatory, their creation often facilitates the asking (and answering) of questions around the sustainability of commercial activities and recycling effectiveness that might not normally occur.

As an example, 28% of respondents indicated they still collect mixed recycling streams within a single container. While this is better than sending all materials for burial or incineration, mixed stream recycling is fundamentally inefficient. Mixed recycling must be unmixed for processing and contamination of individual streams is a common occurrence that prevents recycling.

Where CSER policies are in place, other measures can be taken to

support its implementation and ongoing development. Staff training naturally takes in both the ideals that a CSER policy puts in place as well as how those ideals will be practically executed.

Viewing recycling training at a national level, 27% of UK businesses state they provide training to all relevant staff, followed by 26% of German businesses, 20% of French businesses and 17% of Dutch businesses.

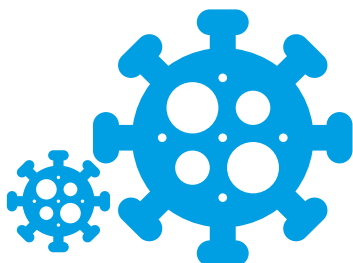
Chapter 6

CONCLUSIONS



8 KEY TAKEAWAYS

1 Ultimately, disruption does not last, businesses adapt



Throughout the findings in this report, it is clear businesses have experienced fundamental disruption throughout 2020, but commercial recycling and waste management have not fallen by the wayside. Businesses are intent on maintaining or increasing their recycling activities in the short-term future.

2 PPE is a new waste stream that many businesses seem unprepared for

The low number of businesses that have PPE specific waste disposal should be addressed by businesses in all sectors. While customers may arrive and leave a facility with the same face mask, this is less certain for staff. Isolated disposal of PPE waste is required for personal safety, but also to prevent ecological impact. PPE risks becoming the new plastic if it is discarded irresponsibly.



3 Pandemic priorities will become business norms

Businesses have had to incorporate new procedures alongside their existing priorities. While initial supplies were in high demand, the processes for safe hand hygiene and PPE disposal have been a developing facet of healthcare environments for decades, and other sectors now have the opportunity to implement more effective, permanent solutions that meet staff and customer expectations.

4 Turning pandemic crisis into recycling opportunity

A significant number of businesses have seen within the pandemic disruption, a chance to increase their recycling efforts. Prioritising recycling over more traditional businesses aims, returns to shareholders for example, reflects an understanding that commercial operations have a responsibility to more than just their internal structure.





5 Consumers are looking for sustainability, businesses can show them what they do

Four out of five consumers want brands to help them be more environmentally friendly and ethical. Businesses that invest in sustainable measures and undertake commercial recycling practices should include details in their marketing messaging. Additionally, businesses can incorporate issue-based communications across social platforms and sustainability policies can be placed prominently on company websites.

6 In order to fully engage, staff need knowledge, guidance and encouragement

Poor levels of staff training are an issue. Even when formal strategies are in place, implementation is not enough. Staff training and engagement are significant factors in the success of recycling and sustainability policies. Consumers have more information than ever about the products that they buy and the businesses they work with. While an outward facing CSER policy is part of communicating sustainability practice, internal practices need to ensure that corporate transparency does not reveal a disconnect with policy.



7 Focus needs to be placed on making recycling more successful

As businesses revert to a prior state of operation, their honesty about the success of their recycling needs to be acknowledged. Whether this is businesses who need help implementing recycling, those that want to improve existing processes or those businesses that want to add more provisioning to their facilities, the continued success of commercial recycling is dependent on its successful adoption by facilities.

8 30% of businesses say that recycling has gained importance as a result of the pandemic

The intention expressed by the businesses we spoke to who want to continue their recycling activities, improving them where they can, means we retain a sense of optimism for the ongoing development and deployment of commercial recycling practices across Europe.



RCP continues to commit resources to encouraging and supporting businesses that want to recycle more.

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METHODOLOGY

The Changing Face of Commercial Recycling in Europe Part Two – A European wide research report into the effect of the COVID-19 pandemic on commercial recycling methodology.

Between July and September 2020, RCP surveyed over 400 commercial waste and recycling buyers to service providers across multiple countries to understand their experience during the lockdown necessitated by the COVID-19 pandemic, how it affected their recycling practices and intentions, and what impact it has had on their future planning.

Respondents were profiled by industry sector, location, number of employees and the number of markets in which their business operates.

³ <https://www.forbes.com/sites/solitairetownsend/2018/11/21/consumers-want-you-to-help-them-make-a-difference/#7ca476556954>

CONTACT US

For more information on the content of this report please contact:

RCPEnquiries@newellco.com

About RCP, waste and recycling

RCP offers a wide range of products to meet the waste management, cleaning and hygiene needs of different sized enterprises and commercial sectors across Europe. The company is committed to creating the most durable and innovative solutions, whatever the sector and its products are designed to consistently out-perform and out-last those of the competition.

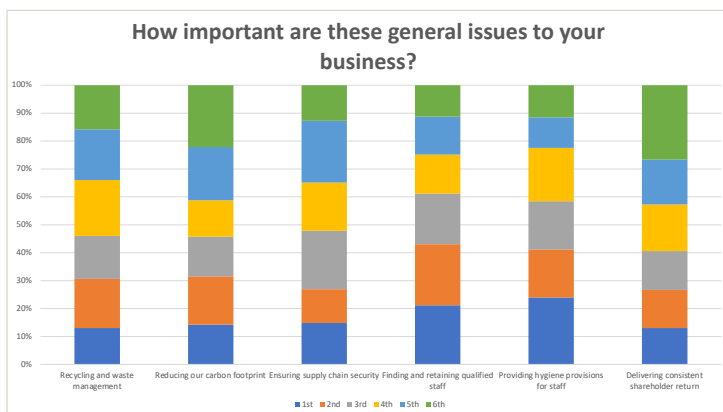
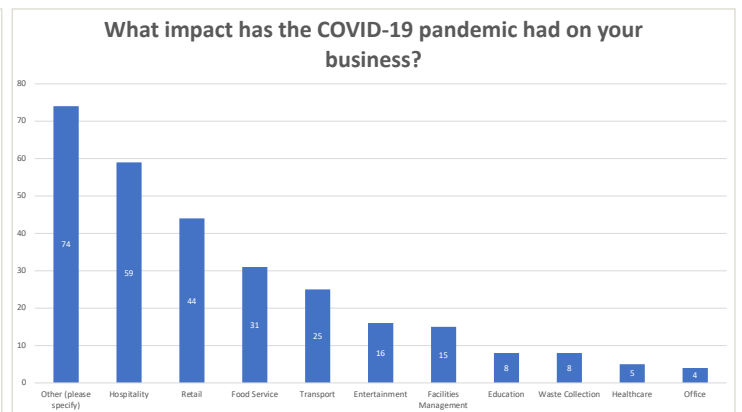
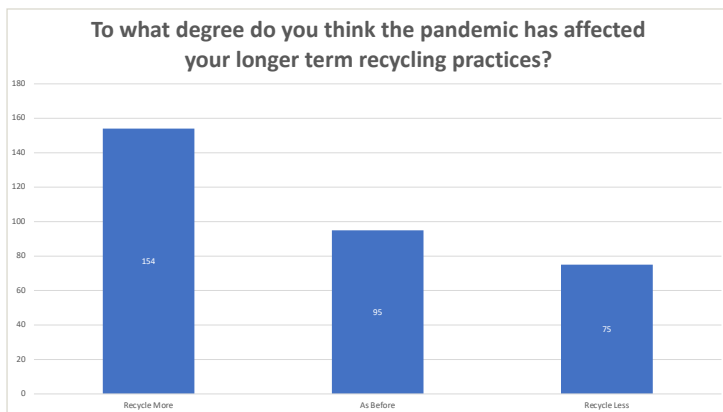
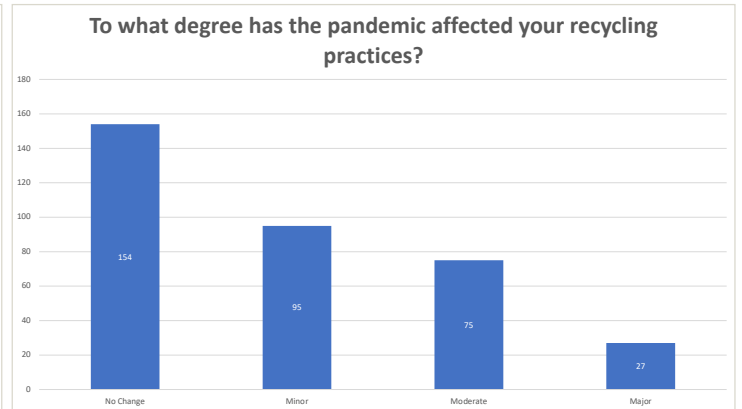
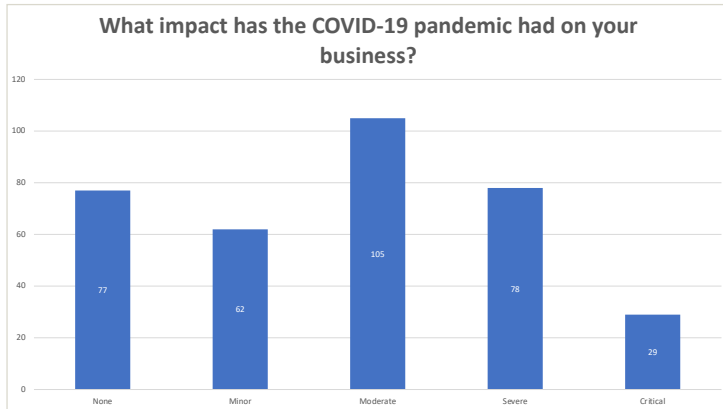
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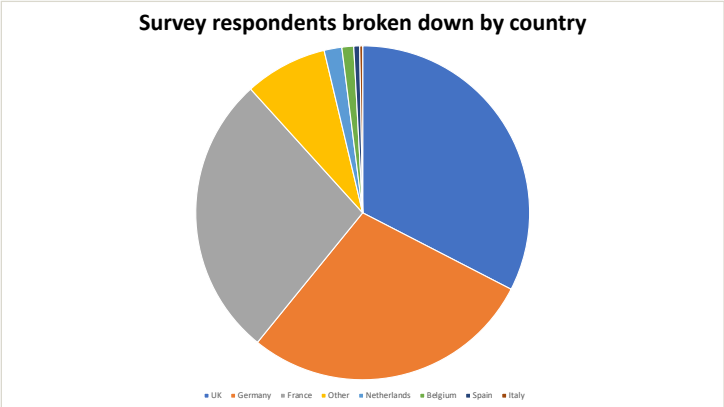
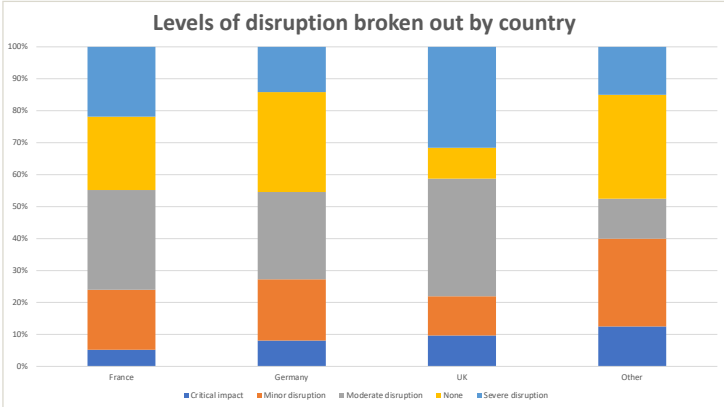
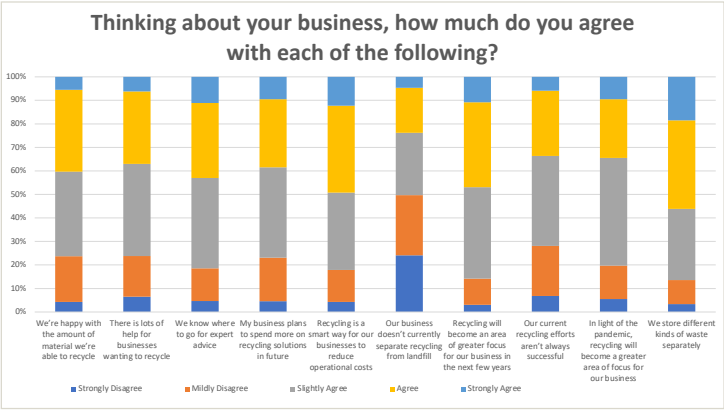
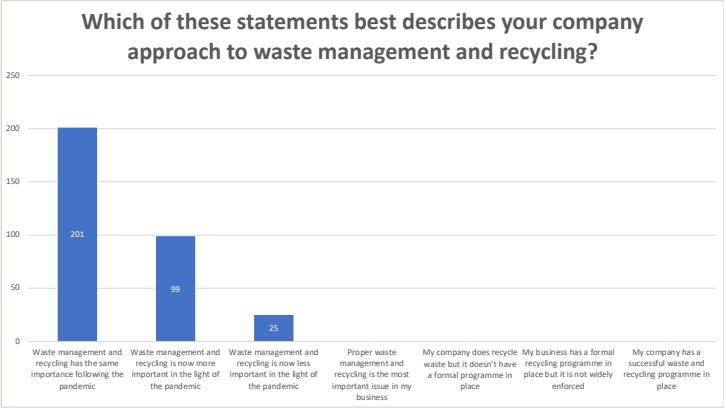
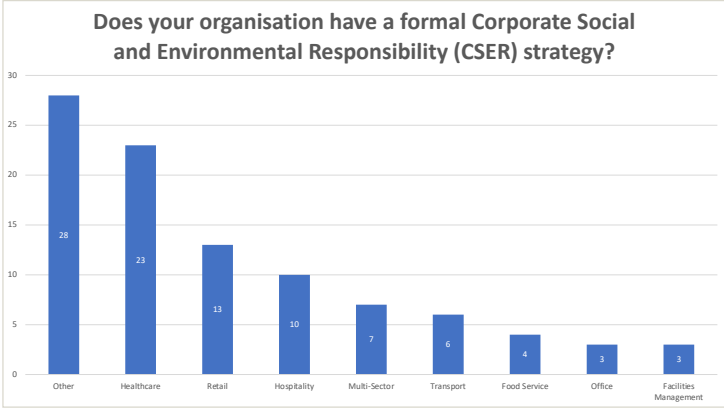
Please contact RCP directly for specialist recycling support.
All data correct at time of publication.



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APPENDIX









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