



Euromonitor
International

Obligation to Opportunity: Closing a Circular Loop in DIY

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EXECUTIVE SUMMARY

Why read this report?

Executive summary

INTRODUCTION

This topic's origin, the challenge's crux, and why change is needed – all in one dialogue
Bonding products are in scope, but the knock-on circularity issue is felt far more broadly
Circularity promises for 2030 have yet to touch closing the product loop at end-of-life
In the bonding products lifecycle, 97% of waste currently escapes the loop by end-of-life
Messaging about end-of-life circularity is conspicuously absent from parts of the sector
There are regions of the world that are going to care about this topic more than others
Leroy Merlin's Home Index starts to look like one of the building blocks of inevitability
A world with less paint – new surface designs that take away a motive to refresh
A world with less adhesives – surface designs that take away the waste during a refresh

CONTAMINATION OF DIY WASTE IS THE FIRST BARRIER TO OVERCOME

Contamination currently blocks even testing end-of-life value; we are stuck at this step
Making products last longer is one way to move the needle; but there is another moment
Contamination comes from the bonding missions, or additives during the act of removal
Product design needs to start taking the economics of disassembly far more seriously
No stakeholders are incentivised to reduce contamination, at any stage of the lifecycle
Part of the problem: WD-40 offers fast and easy removal, and it then blocks EOL options
Part of the solution: Tesa's new adhesives have a "tensile versus sheer" breakthrough
We need Designing for Deconstruction to normalise, and we need to fix waste handling

RECOVERING WASTE HAS REVERSE LAST MILE WITH BATCH-OF-ONE ISSUES

Overcoming the scale issue is about "Consumer System Thinking" and not going it alone
Consumer systems: A conceptual tool promoting disruptive thinking and broad horizons
Brands do not need to solve reverse last mile; they need a "friend" that already fixed this
There are partners who can also make the leap to influencing renovation waste control
Kingfisher as a partner example is a contact point for a lot of the needed moving parts
Consumer System Thinking is how we solve both the immediate and ultimate challenge

WHERE IS THE MONEY? UNTIL CIRCULARITY MEANS PROFIT, IT WILL NOT SCALE

Elephant in the room: Cross-linked polymers are mission critical, and non-recyclable
The direction of travel for regulation that will force the sector's hand is not at all hidden
EU regulation creates a framework implying a ticking clock for the sector to self-solve
Self-image, ethics and reality do not always coincide, so can we pass through the costs?
Cutting-edge re cycling with existing formulations is only possible for fresh (wet) product
The best we can do with the paint pasty fraction (recovered dry paint) is down cycling
Patents and promises: Innovations in the pipeline for dynamic covalent networks
Action now makes sense, only because all three barriers start to have viable answers

CONCLUSION

Time is a variable, the circular destination is not; we solve the issue, or we will be solved
We foresee three ways this situation can play out, based on the current variables in play
Recommendations for how brands can make progress developing necessary solutions
Lowest hanging fruits and risks implied on this journey for retailing and value creation
Reuse and removing initial waste during application requires more consumer incentives
Evolution of the circular loop for bonding products in DIY
Questions we are asking
A parting thought

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