



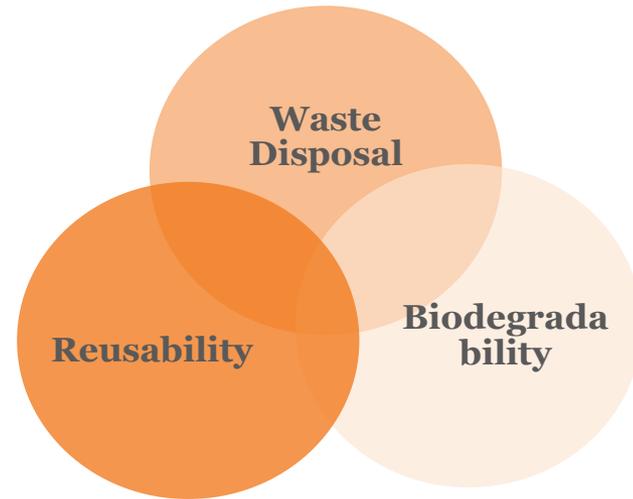
## **GREEN GROWTH IN HYGIENE PRODUCTS**

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# Nappies/Diapers/Pants: Key Green Considerations

- One of the key issues driving green considerations in the hygiene industry remains waste disposal. Although recycling has been commonplace in most developed nations for decades this still only accounts for a small proportion of waste disposal.
- It has been estimated that in the UK, 90% of the three billion disposable nappies disposed of annually go to landfill. These represent some 4% of household waste, and 50% of the waste from a household with just one baby.
- That said nappies only made up 0.1% of total landfill volume in the UK (2010) so clearly there is divergence between consumer experience of waste disposal and issues faced by local municipal governments.
- The UK government has set ambitious targets to get landfill volumes down by 45% by 2020 with its landfill tax escalator set to more than double the cost per landfill tonne from £32 in 2010 to £72 by 2014.
- In practical terms, tax rises will see the disposal costs for nappies/diapers rise from £0.02 per unit to £0.05 with some calls to levy manufacturers directly for these charges. Consumers are also facing higher local tax bills to pay for waste disposal or the threat of having their rubbish weighed in some areas.

## Key Environmental Considerations in Nappies/Diapers



- In the US, this number rises to 18 billion disposable nappies per year, with a corresponding five million tonnes of untreated human waste. Similar to the UK, there is an ongoing debate as to whether the manufacturers of those products that end up in landfill should be charged for disposal.
- In developed economies, the strong pressure from government as well as through consumer choice is fuelling the search for a solution. Taxation, in the case of the UK, has encouraged hygiene waste recycling specialists such as Knowaste (knowaste.com) to set up its first facility in the UK in 2008.

## Compostable/Biodegradable

- With recycling the exception rather than the rule in nappies/diapers, consumers continue to look for alternatives or at least more “sympathetic” alternatives to straight landfill. This has been especially the case among new parents who at least anecdotally experience guilt on seeing the large number of nappies heading straight to landfill.
  - Alternatives to landfill come with the development of biodegradable and compostable brands which made their way onto some markets in through 2009 and 2010, Moltex being a key manufacturer.
  - Although composting at home is impractical for most due to the large area needed to compost such volumes of nappies/diapers, the vast majority of these products still find their way straight to landfill but at least consumers rest assured in the knowledge that these products will break down easily unlike the 500 years composition time commonly associated with standard (non-biodegradable) products.
  - The problem for “compostable” nappies/diapers, which are reportedly popular with consumers (due to their biodegradable and return to nature properties), is that in order to degrade effectively sunlight and oxygen are required, and these are not the conditions found in landfill. Even if suitable conditions did exist in landfill, the definition for “compostable” is still very loose and many materials (especially plastics) require heating to a high temperature in order to start the decomposition process.
  - Once again features such as compostable/biodegradable which score highly with consumers tend to be some of the least effective in terms of improving nappy/diaper sustainability and run the risk of there being an element of “green washing” involved in products emphasising their sustainable credentials based on biodegradable features.
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- The logo is circular with a blue border. Inside the border, the text 'HUGGIES® NAPPIES AND' is written in white at the top, and 'ENVIROCOMP SOLUTION' is written in white at the bottom. In the center of the circle is a green tree with a white trunk and branches, set against a green background. Two white arrows form a circular path around the tree, pointing clockwise.
- In 2007, the New Zealand city of Canterbury trialled a nappy composter run by EnviroComp and sponsored by Kimberly-Clark's Huggies brand. Over the five months of its initial trial approximately 450,000 nappies were composted, which equated to 56 tonnes. Due to what it described as unprecedented demand, 2009 saw its first custom-built composter go into full operation providing composting for the full range of hygiene products. For a fee of NZ\$5.20 per week the company will collect nappies from the door for composting as well as providing services for institutions and day care.

## Reusable alternatives

- As with the degree to which environmental impact can be reduced, using these products is reliant on the commitment of the end consumer. Ultimately however, few parents have the skills or the inclination to approach using nappies in the most cost-effective and sustainable way, although the amount of coverage this subject receives especially over the internet is far in excess of the around 2% of babies in the UK who are regularly using reusable nappies suggests.
- Although the argument based on nappy/diaper spend per child for using reusable nappies is compelling it does fail to take into account the amount of time a parent would have to spend laundering or alternatively the cost of hiring an outside business to take on this task. Especially in the developing world, most notably India, where most middle-class consumers can still afford help for around the home, reusable nappies are still the norm rather than the exception, although with higher rates of employment the long-term future would appear to favour disposable products as a cost-effective alternative to hired help.

