

Zero Waste Live!

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CREATING EFFECTIVE SYSTEMS FOR REUSE



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Companies (GDB)

Germany's Refillable Bottle Systems

Zero Waste Live ! Webinar

April 13th 2021



Genossenschaft
Deutscher Brunnen eG

GDB: facts and figures



- ▶ Trading and service company of German mineral water bottlers,
- ▶ Cooperative (non-profit business)
- ▶ Headquarters: Bonn, Germany
- ▶ Founded: 1937
- ▶ Members/Customers: 162
(nearly all German mineral water bottlers)
- ▶ turn over 2019/20: about 160 m. €
- ▶ Staff (group): 50

Refillable Working Group: facts and figures



- ▶ Managing the Refillable Logo and working as a think tank & information point about refillables serving companies, start-ups, authorities and science
- ▶ Joint Organization of 8 Associations of Beverage Industry, Retail and environmental NGOs
- ▶ > 200 Companies with more than 600 brands
- ▶ Founded 2005

Characteristics of the German Beverage Market

- ▶ Many Regional/Local producers: 1,350 breweries, 180 mineral water bottlers, 400+ softdrink & fruit juice producers
- ▶ Beverages are sold in crates
- ▶ A rich, diverse and specialized retail structure for beverages: 3,500 gross retailers, 12,000+ specialized beverage retailers
- ▶ This sums up to 150.000 green jobs

Taxonomy of (German) Beverage Containers

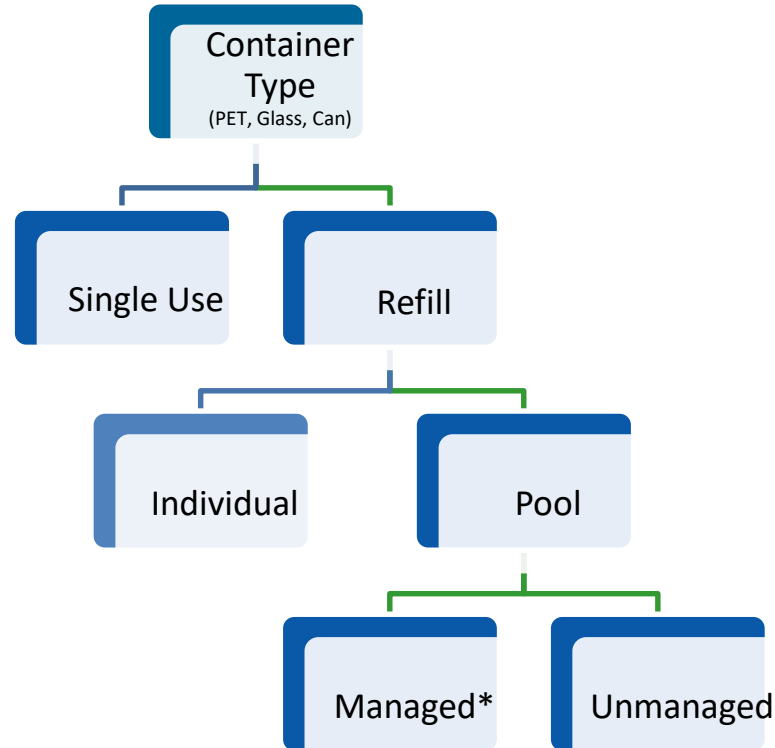
Typical Questions Associated

- Type of beverage?
 - Branding?

- Customers and Consumer preferences
- Strategy (Corporate, Brand)

- Economic and environmental efficiency
 - Costs
 - Independence

- Quality
- Fair Share of burdens



Typical Issues Associated

- Beer in PET is a „no-no“ in Germany

- Most discounters won't list reuse
- Glass associated with high-quality (Branding!)

- Pool bottles = co-operation with competitors
- Individual bottles higher costs

- Unfair practices in unmanaged pools
 - Quality issues

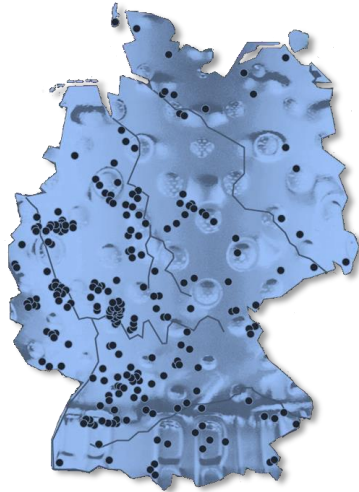
GDB Pool Reuse Systems



GDBs reuse bottle system is a
Managed Pool System

It is referred as **the** pool system for beverage containers in Germany

GDB Glass- and PET-Reuse-Pools & PET Circular System



Market Share:

Beverage Container Mineral Water Market

> 40 %

GDB Share Reuse:

GDB Glass- & PET-Reuse in Mineral Water Market

> 70 %

Bottles Filled in 2020:

All GDB Systems

~ 6,8 billion

**Number of Reuse
Bottles:**

Glass- und PET-Reuse of GDB

> 1 billion

Deposit Value:

Glas- und PET-Mehrwegpools der GDB

> 300 million €

>140
bottlers

> 400
brands



Purpose of Pool Management

- ▶ legal framework for all bottlers
 - ▶ balanced input and ejects
 - ▶ responsibility of all bottlers
 - ▶ fair sharing of benefits and duties
 - ▶ clearing activities
 - ▶ market analyses
- Resulting in a well working system since more than 50 years

A wide range of GDB Refillable Pool Containers

Glass & PET

Refillables

from 0,5 – 1,5 L



Beer & CSD Unmanaged Reuse Bottles



In the German beer market and parts of the CSD market
dominance of

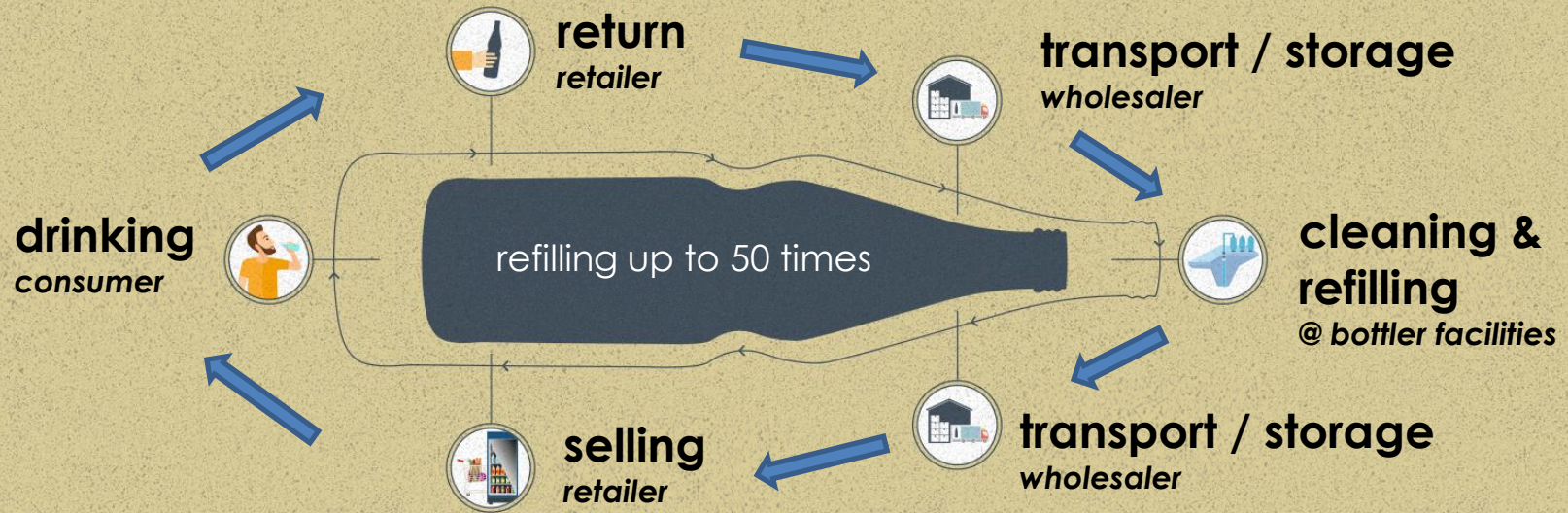
unmanaged reuse bottles & crates

Beer & CSD Reuse Bottles



- ▶ Bottles used by brewers, CSD-producers, fruit-juice-makers etc.
- ▶ Estimates range between 1.5 - 2 billion bottles, 150-200 million crates in the market
- ▶ Growing issues with lost bottles, poor quality and unfair share of burden
- ▶ 2020: New initiative to set up a management system for this part of the market

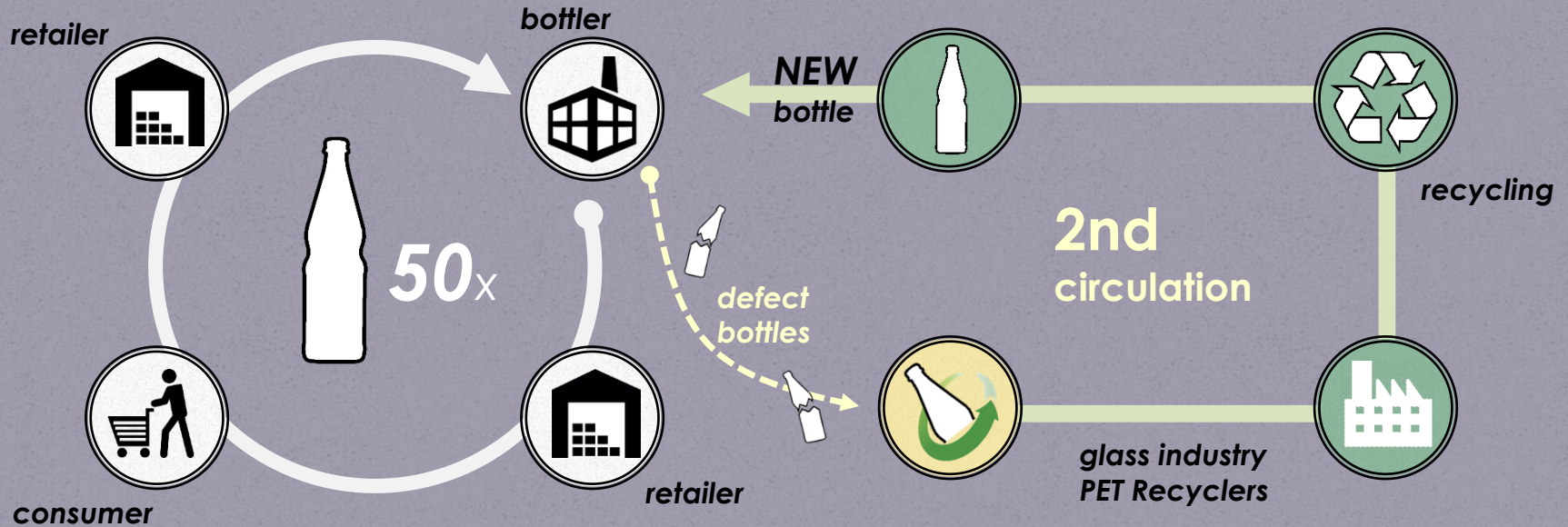
The German Refillable System: A decentralized structure – the “Invisible Hand” at work



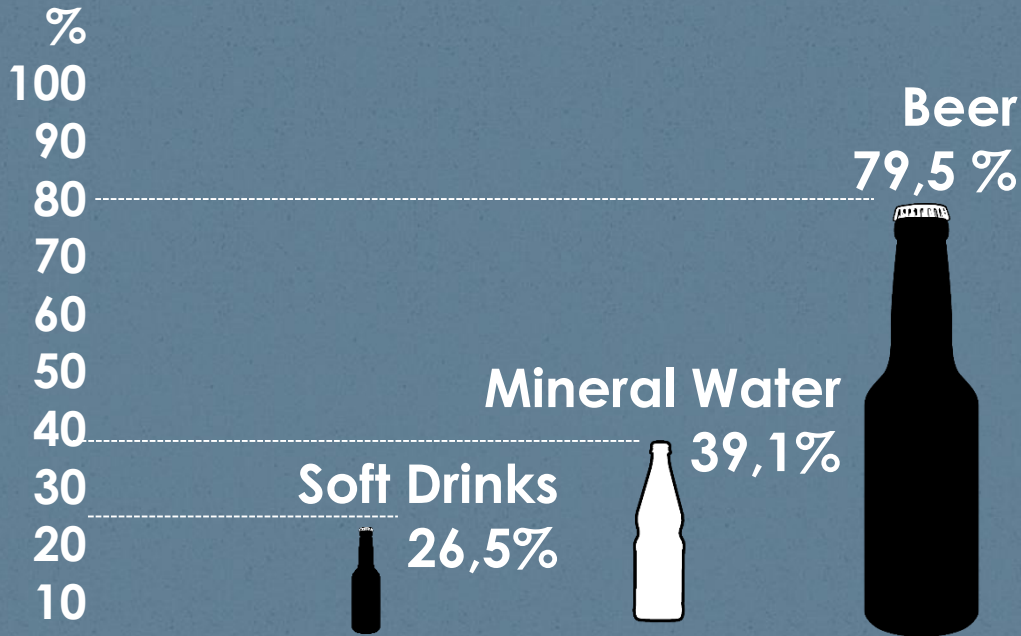
Graphic based on: <https://www.volle-pulle-umweltschutz.de>

A combination of self interest, experience, and established traditional structures

The Double Circuit of Refillables



Market Share Refillables (Official Federal data of 2018)



The Trend:
Growing
market share
for glass refill



Deposits

	Deposit	Remarks
Single Use (Mandatory)	€ 0,25	Based on German Packaging Law
Reuse	€ 0,08 – 0,15 Sometimes € 0,25 and more...	No legal requirements „Commercial Custom“
Crates	Usually € 1,50 Other deposits in the market	No legal requirements „Commercial Custom“

— The most important ingredient...

Simplicity*

* For consumers

Current Tasks & Challenges

- ▶ Stop loss of market share in PET-Reuse
- ▶ Raise rPET share (especially with clear PET-resue bottles)
- ▶ Become Carbon Neutral by 2030: a 10 Year project
- ▶ Erase flaws in the current German packaging law

A New Trend: Reuse beyond beverages





Thank you!