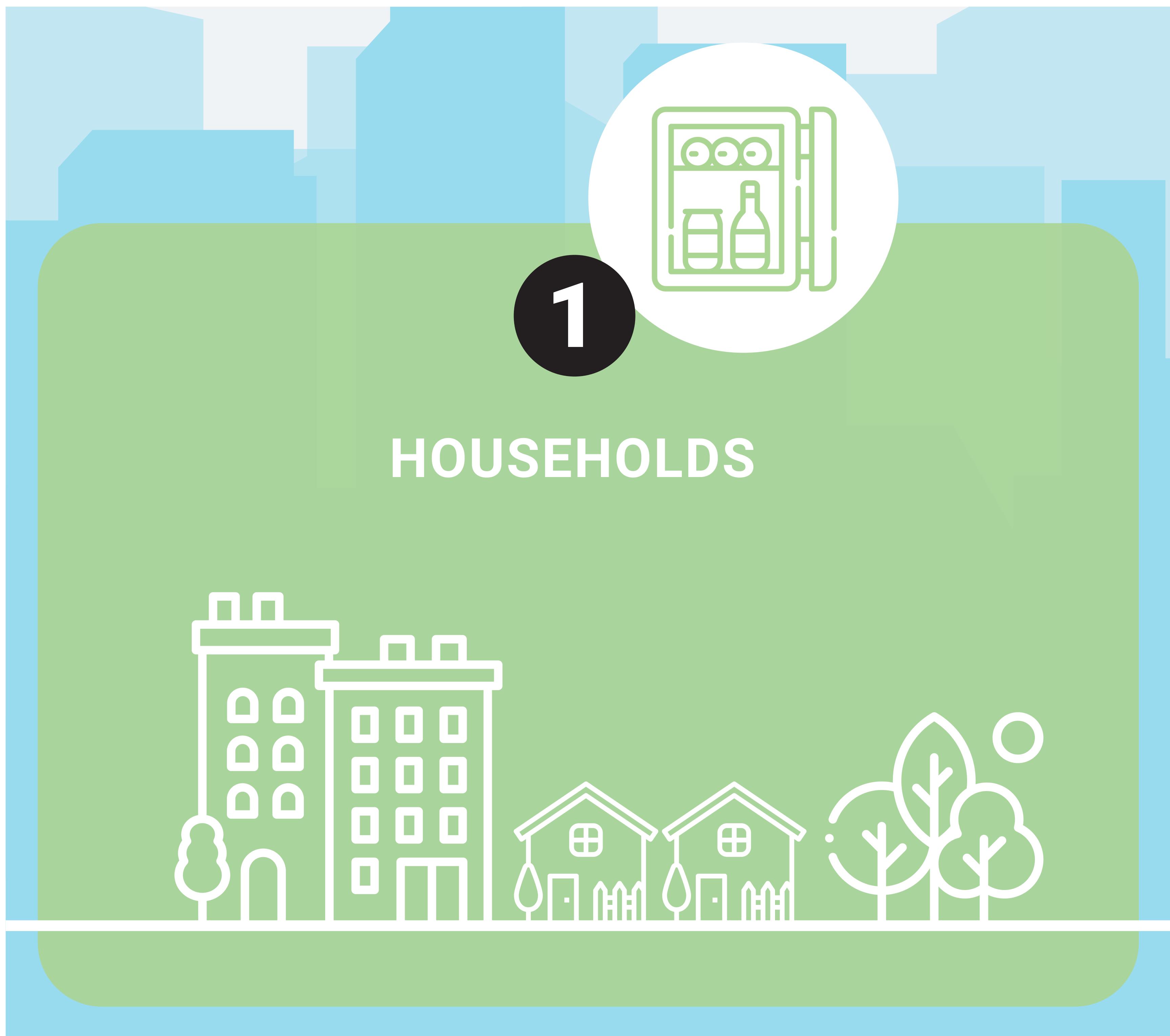


## close the glass loop

## Assessing one-way glass beverage packaging in HORECA





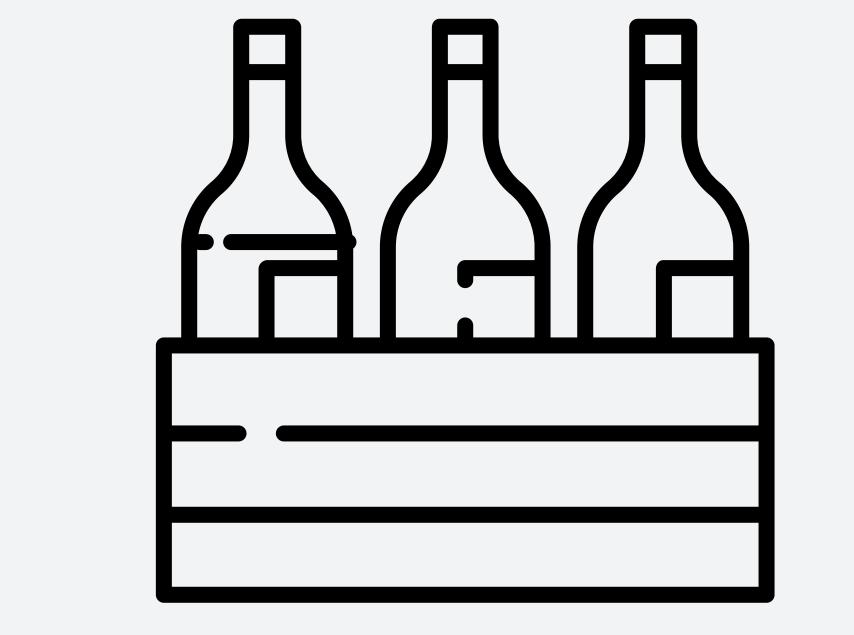
## Products packed in glass are usually consumed and discarded in two major points of consumption.

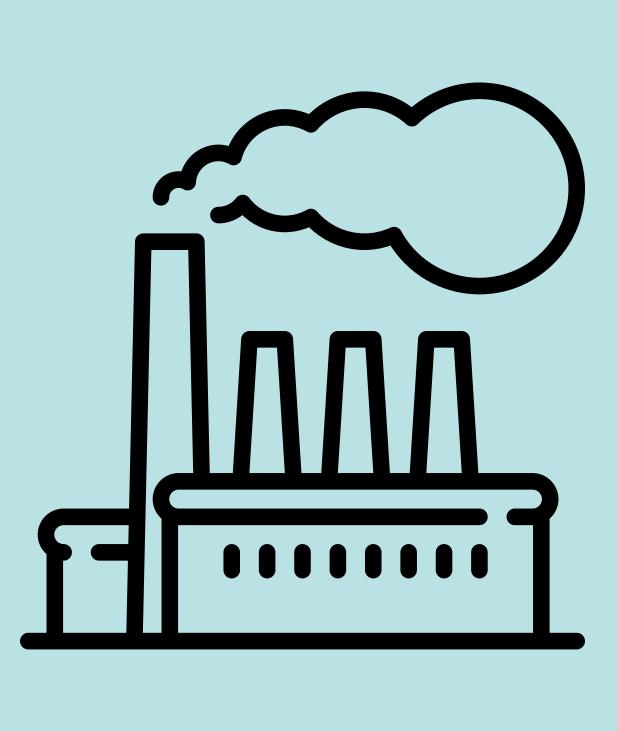
# HOTELS, RESTAURANTS AND CAFÉS (HORECA) HOTEL CAFE



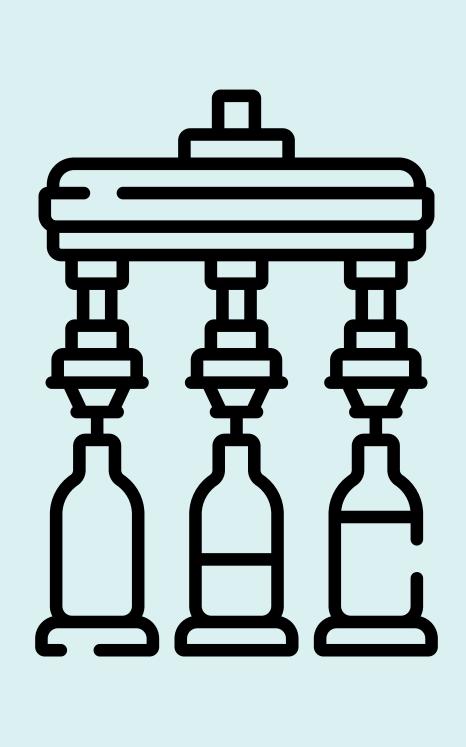


#### **GLASS COLLECTION** FOR REUSE





#### **Glass manufacturing**









## There are 2 types of glass collection in HORECA.



#### **GLASS COLLECTION** FOR RECYCLING

## HOTEL CAFE

There are over 2 million HORECA establishments in EU27 + UK

Accommodation

Pubs, Clubs & Bars

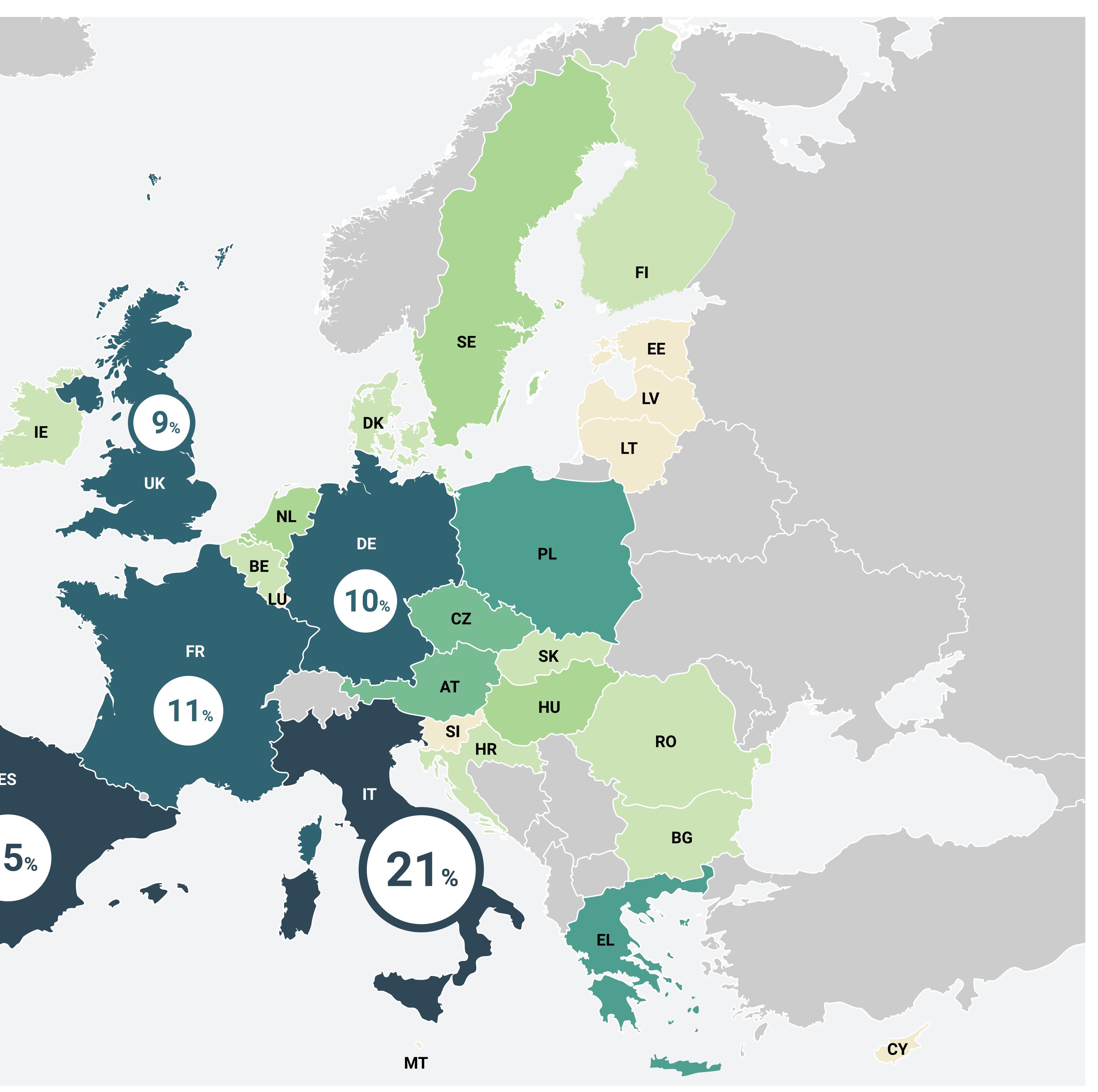
Restaurants

### Scope of the study: HORECA establishments and one-way glass beverage packaging.



	Total number of	Share of establishments	
	establishments	vs total EU + UK	
Italy	425 570	21%	EU + UK
Spain	320 122	15%	total
France	231 794	11%	HOTEL CAFE
Germany	211 289	10%	
<b>United Kingdom</b>	188 184	9%	
Greece	98 390	5%	2069100
Portugal	90 232	4%	
Poland	77 484	4%	HORECA
Czech Rep	55103	3%	establishments
Austria	52 649	3%	
Hungary	47 003	2%	
Netherlands	42 107	2%	
Sweden	31 793	2%	
Romania	28765	1%	
Bulgaria	28 711	1%	
Belgium	23 969	1%	
Slovak Rep	17 419	1%	
Ireland	17 228	1%	
Croatia	16 41 4	1%	
Denmark	16175	1%	
Finland	11 344	1%	E
Slovenia	9794	<1%	PT
Cyprus	7 6 9 2	<1%	
Lithuania	5468	<1%	
Latvia	4617	<1%	
Estonia	3737	<1%	
Malta	3 0 9 7	<1%	
Luxembourg	2950	<1%	
TOTAL	2069100		

## Where do you find the most HORECA establishments in EU + UK?



## Where do you find the most HORECA establishments relative to population in EU + UK?

	Ratio = 1 HORECA estab
	for every "" inhabit
Greece	109
Cyprus	114
Portugal	114
Italy	141
Spain	147
Malta	159
Austria	168
Czech Rep	193
Hungary	208
Luxembourg	208
Slovenia	212
Bulgaria	244
Croatia	248
Ireland	285
France	290
Slovak Rep	313
Sweden	322
United Kingdom	354
Estonia	355
Denmark	359
Germany	393
Netherlands	<b>410</b>
Latvia	<b>416</b>
Belgium	<b>478</b>
Finland	<b>486</b>
Poland	<b>490</b>
Lithuania	511
Romania	675
EU + UK Average	248

#### ablishment itants

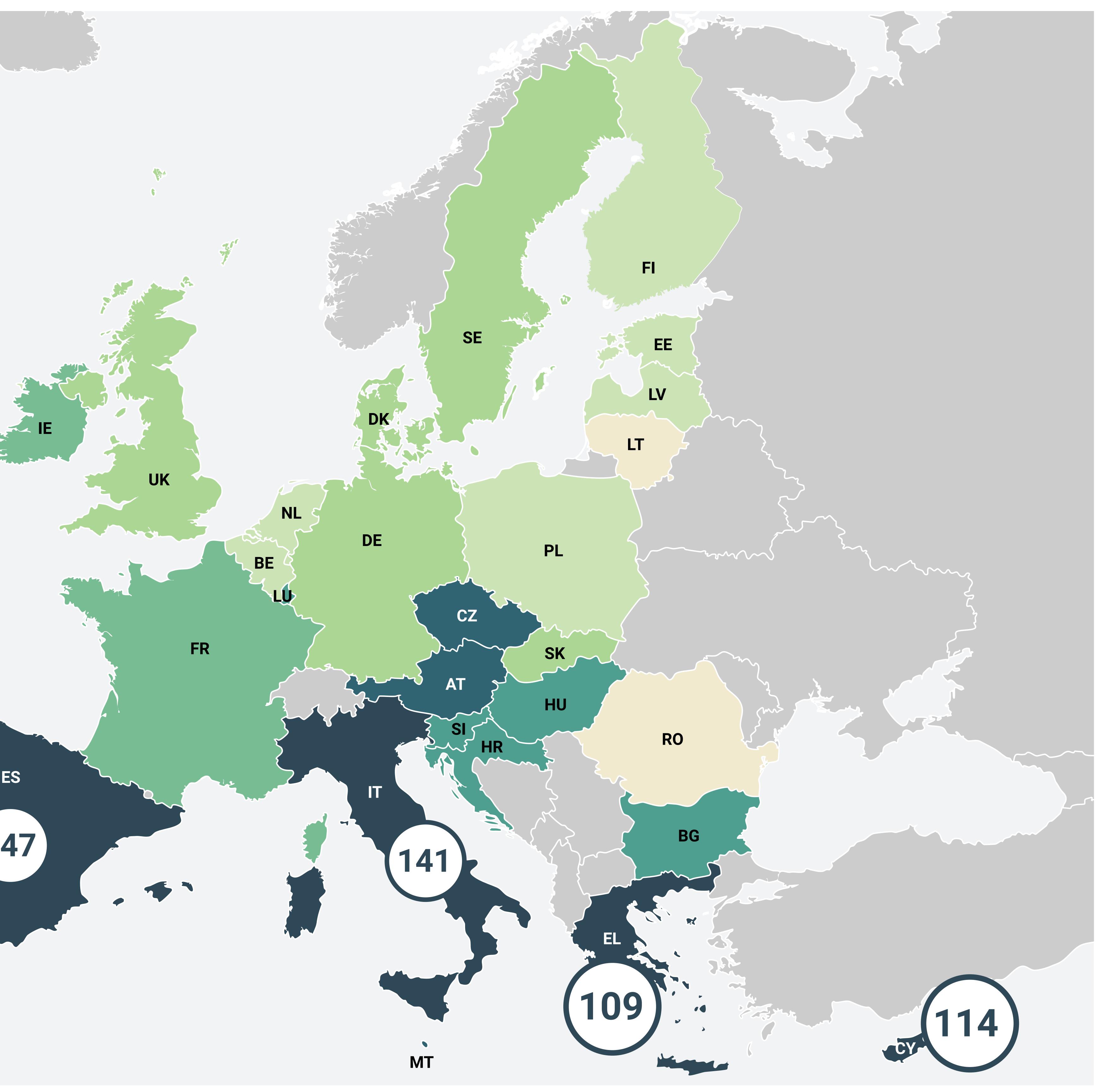
1 HORECA establishment for every



inhabitants

EU + UK

average

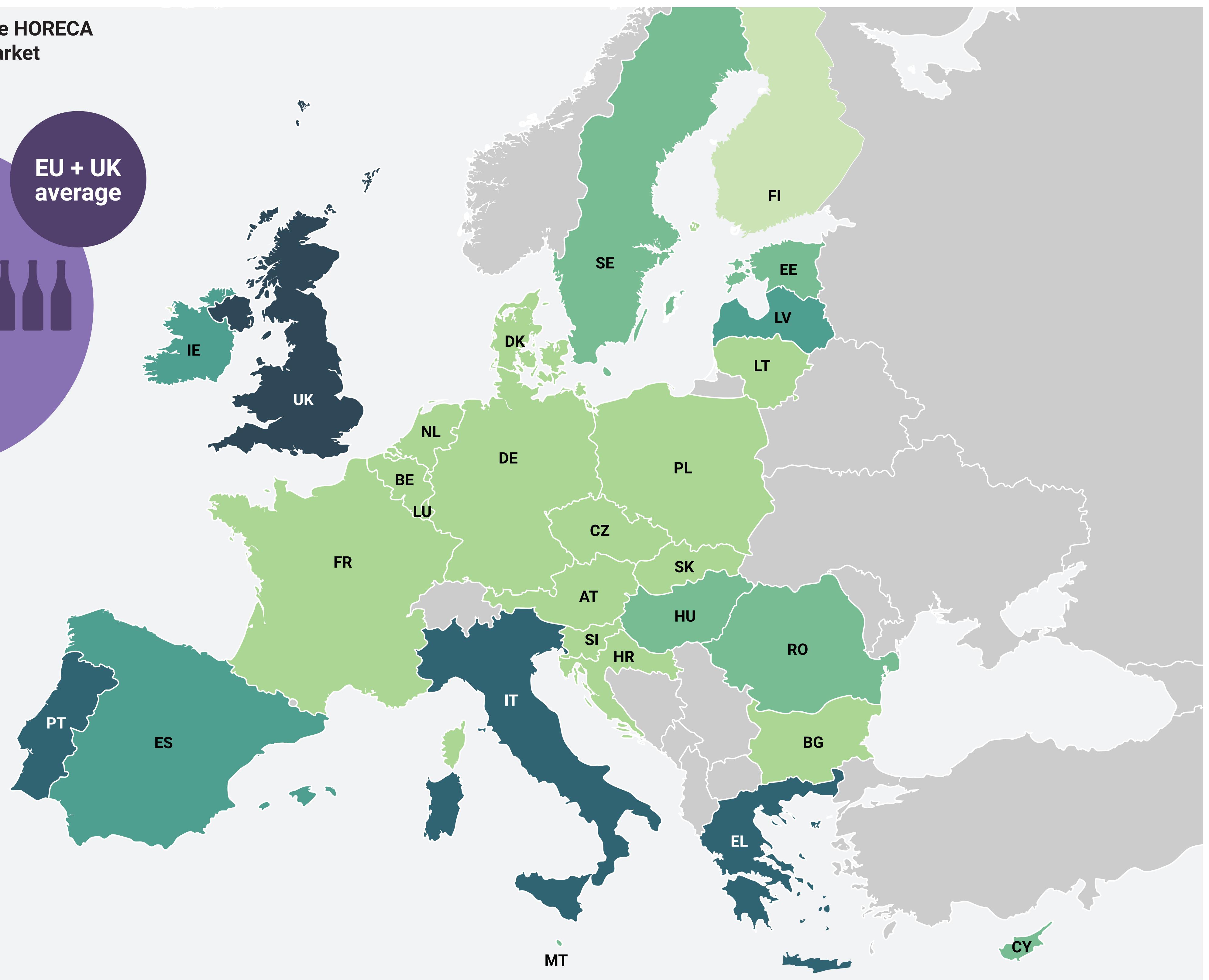


United Kingdom	3	
Portugal	2,3	
Greece	2,2	
Italy	2,1	
Spain	1,9	
Ireland	1,6	
Latvia	1,5	
Malta	1,4	
Sweden	1,3	
Hungary	1,2	
Cyprus	1,0	
Romania	1,0	
Estonia	1,0	
Slovenia	0,9	
Bulgaria	0,9	
Austria	0,8	
Czech Republic	0,8	
Slovakia	0,8	
France	0,7	
Finland	0,7	
Denmark	0,6	
Croatia	0,5	
Lithuania	0,4	
Belgium	0,3	
Netherlands	0,3	
Poland	0,3	
Luxembourg	0,2	
Germany	0,2	

## Which countries have the most one-way glass beverage bottles in the HORECA channel vs all glass beverage bottles placed on the market?

Number of one-way glass beverage bottles placed on the market in the HORECA channel out of every 10 glass beverage bottles placed on the market

#### EU + UK average /10



# 17,5 million tonnes

Total glass packaging placed on the market in EU27 + UK in 2019 (in tonnes, Close the Glass Loop data)

### Estimated share of one-way glass beverage packaging in HORECA.

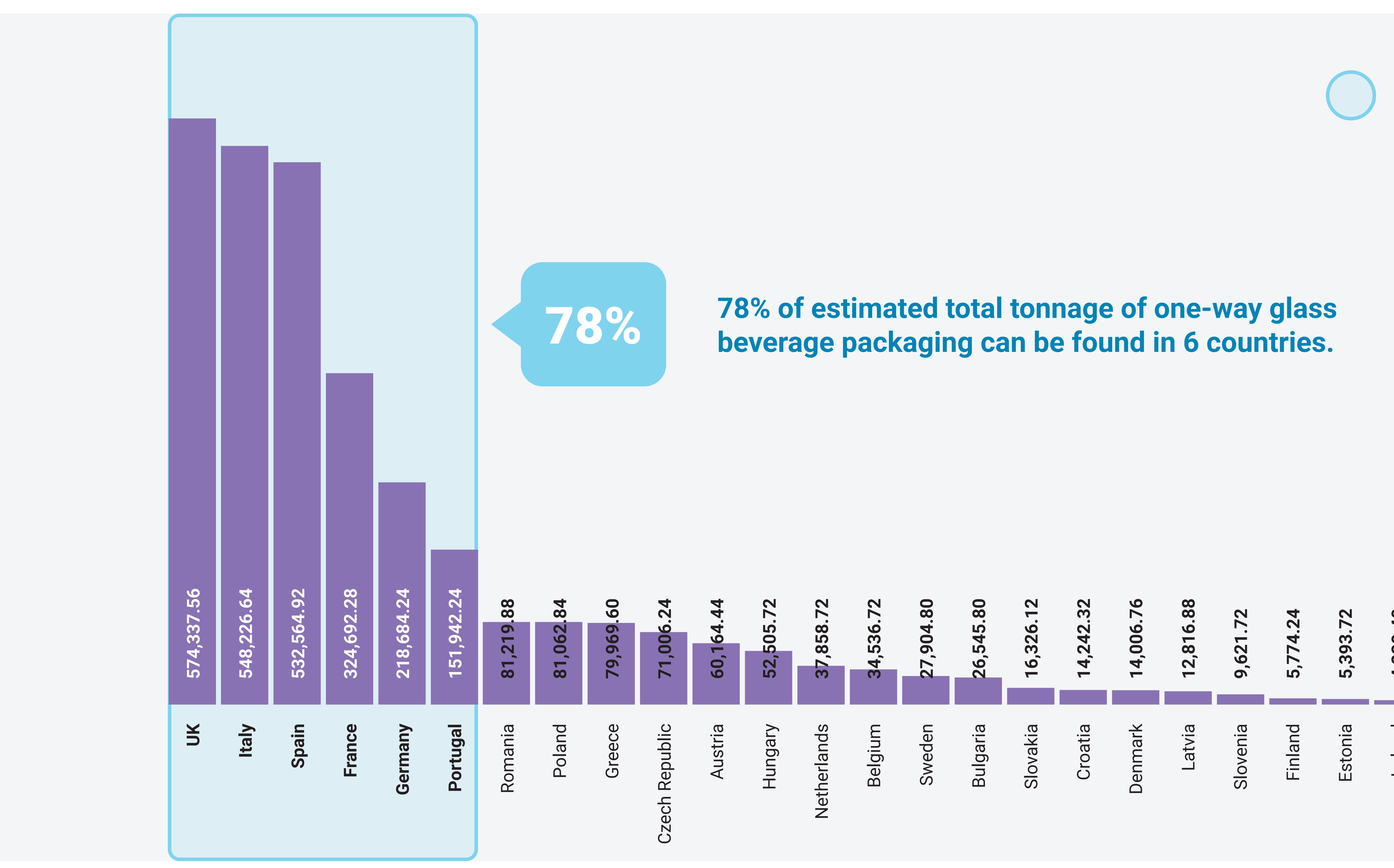


## 3 million tonnes

Estimated total one-way glass beverage packaging placed on the market in HORECA in EU27 + UK in 2019 (estimate made by Oakdene Hollins, based on Global Data)



## Estimated total one-way glass beverage packaging in HORECA by country (in tonnes, estimate made by Oakdene Hollins, based on Global Data for 2019).



#### **Countries above 100.000t**

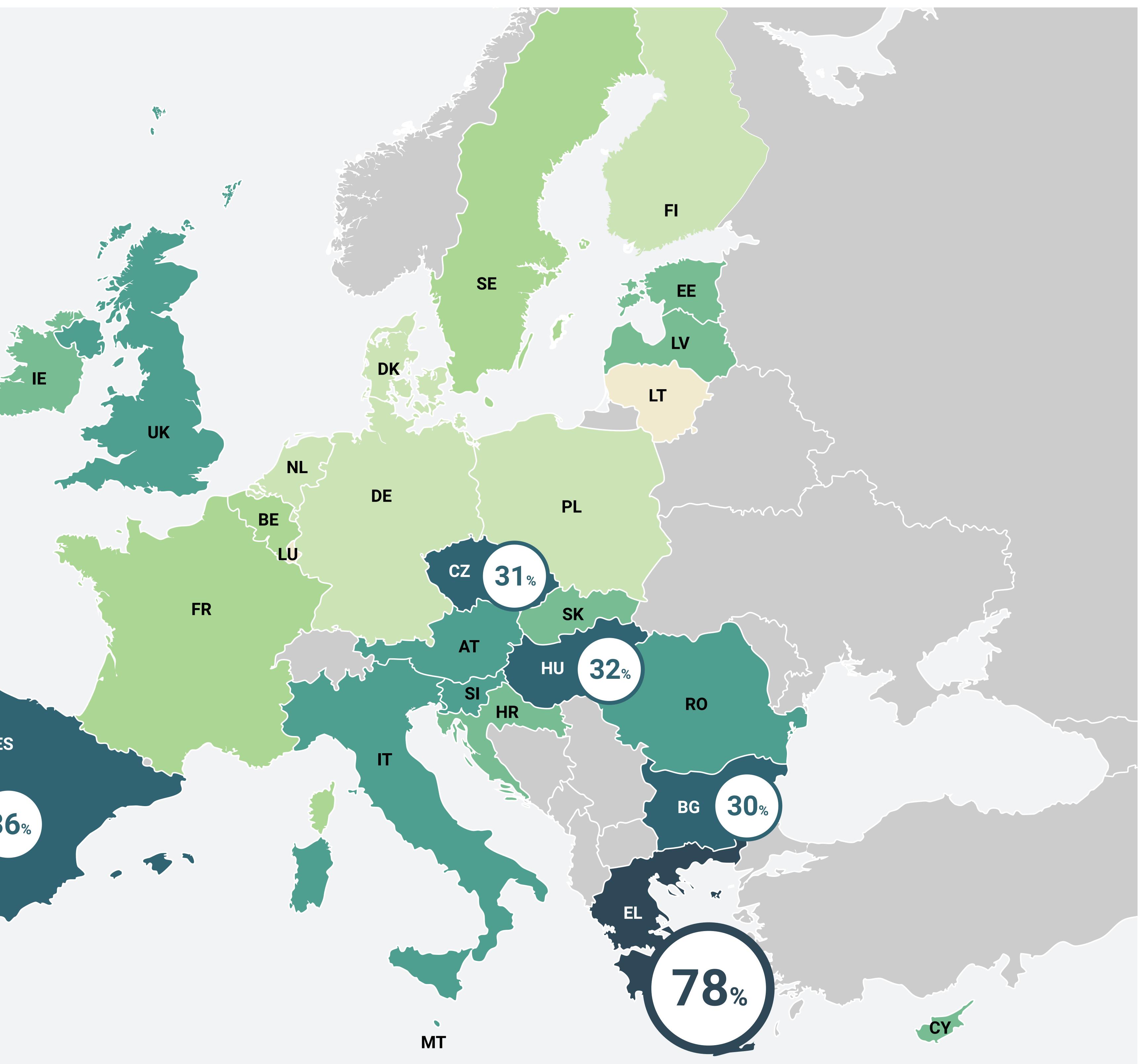
Represents countries with high volumes of one-way glass beverage packaging in HORECA

<b>5,393.72</b>	4,220.40	<b>3,762.92</b>	<b>3,503.20</b>	<b>3,346.16</b>	1,105.32
Estonia	lreland	Lithuania	Malta	Cyprus	Luxembourg

### Which countries have the highest share of tonnage for one-way glass beverage bottles in HORECA compared to the total glass packaging tonnage placed on the market?

#### Estimated share of one-way glass packaging in HORECA vs total glass packaging tonnage placed on the market

Greece	78%		
Portugal	39%		
Spain	36%		EU + UK
Hungary	32%		average
Czech Republic	31%	<u>i</u> A A <u>i</u>	I
Bulgaria	30%		
Slovenia	26%		
Malta	26%		
United Kingdom	24%		
Romania	23%		%
Italy	20%		
Austria	20%		
Latvia	19%		
Cyprus	18%		
Slovakia	18%		
Croatia	17%		
Ireland	15%		
Estonia	15%		
Sweden	12%		<b>59%</b>
France	11%		
Belgium	11%		PT
Netherlands	7%		30
Denmark	7%		
Germany	7%		
Finland	7%		
Poland	6%		
Lithuania	5%		
Luxembourg	3%		
EU + UK Average	17%		



## **Comparison** between annual average consumption of glass packaging vs. estimated annual average consumption of one-way glass beverage packaging in the HORECA channel (per capita, estimate made by Oakdene Hollins, based on Global Data for 2019).

# 

In EU27 + UK, in 2019, there was an average consumption of 34,12kg of glass packaging / capita (Eurostat, 2019).

# per capita

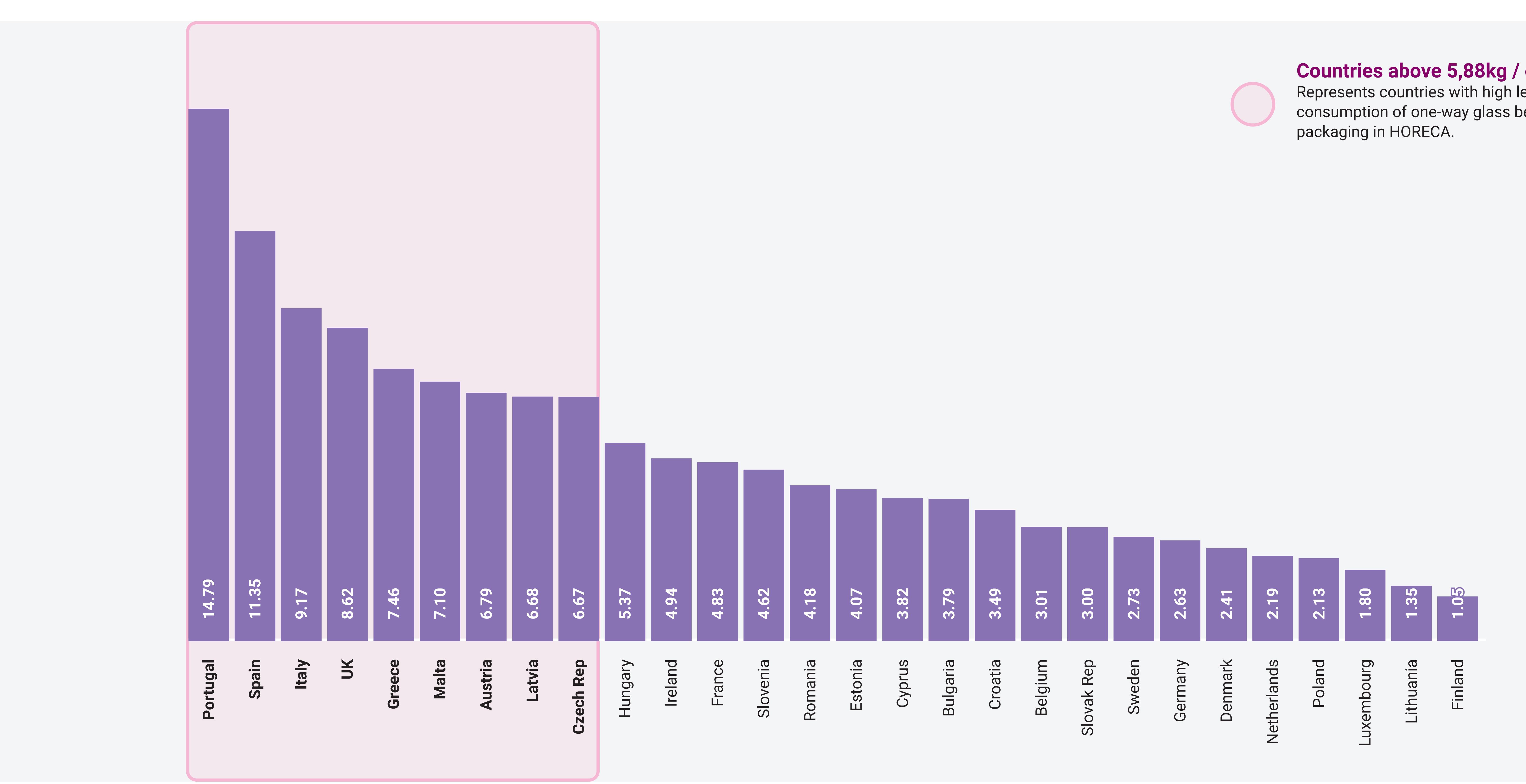
In EU27 + UK, in 2019, there was an average consumption of 5,88kg of one-way glass beverage packaging in HORECA / capita.





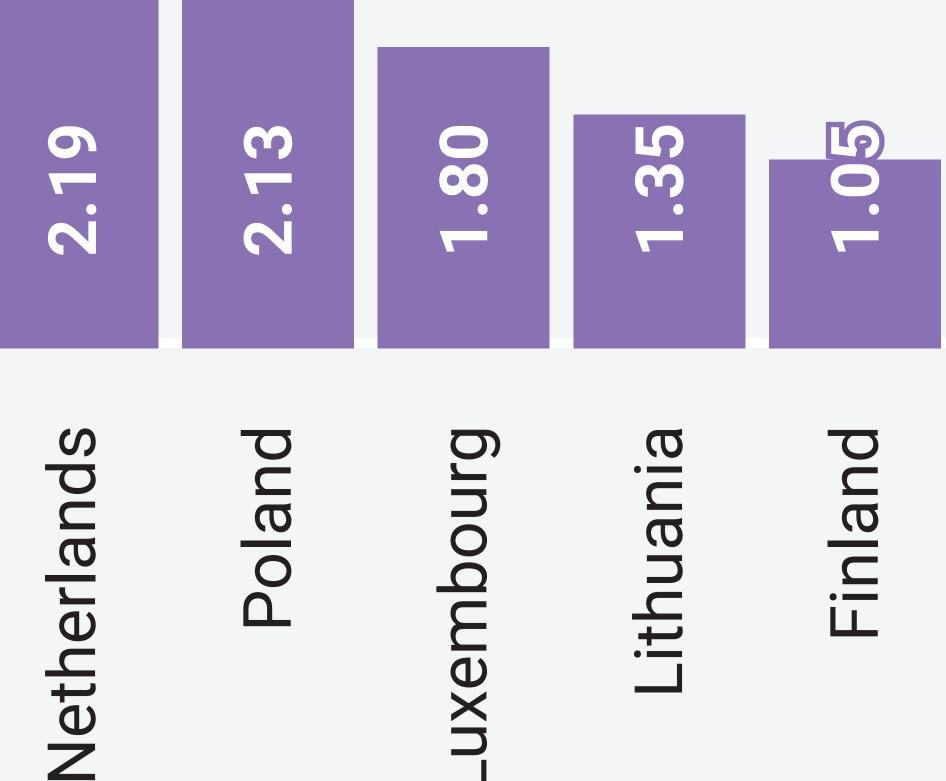


### Estimated annual average consumption of one-way glass beverage packaging in HORECA by country (in kg/capita, estimate made by Oakdene Hollins, based on Global Data for 2019).



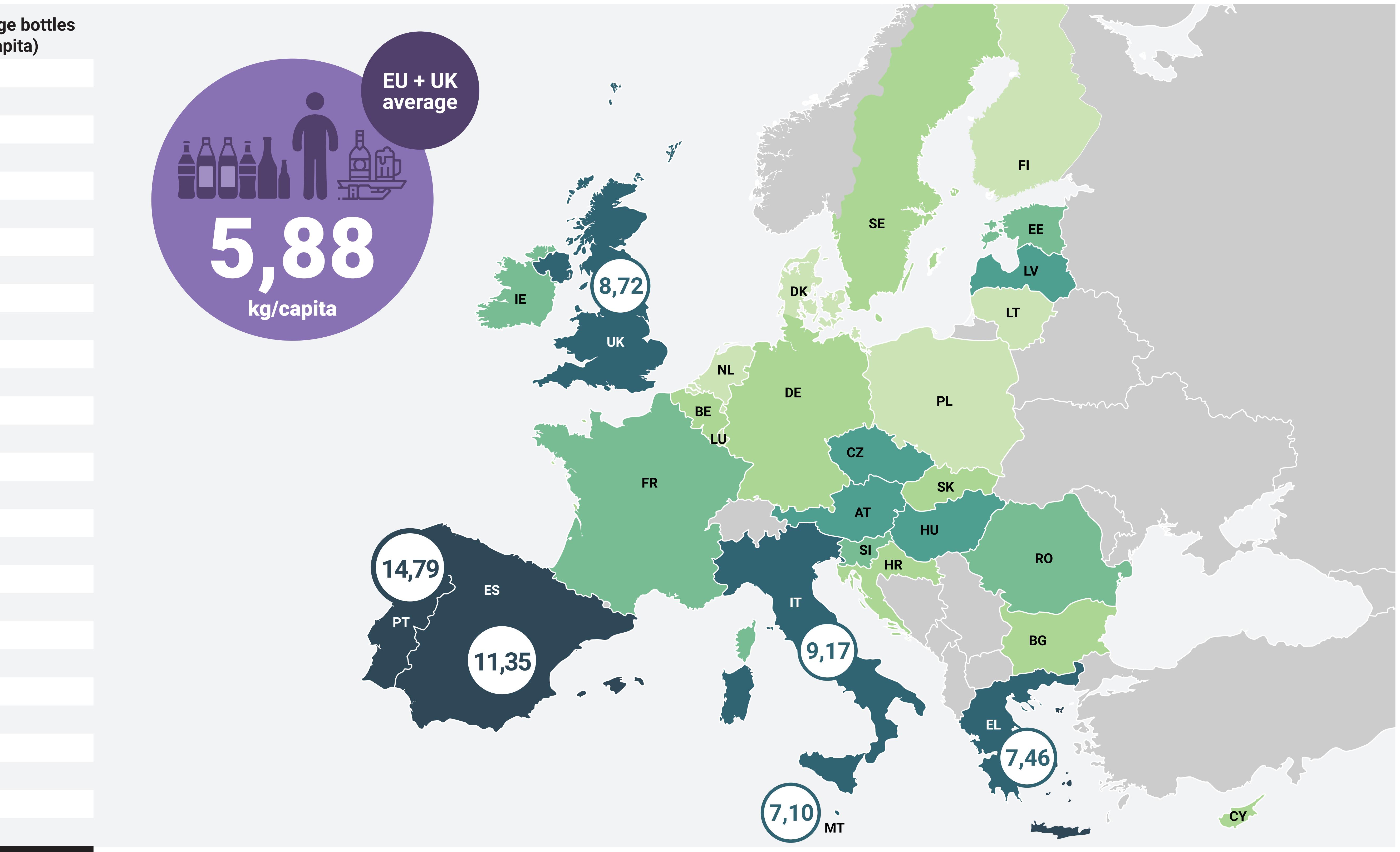
#### **Countries above 5,88kg / capita**

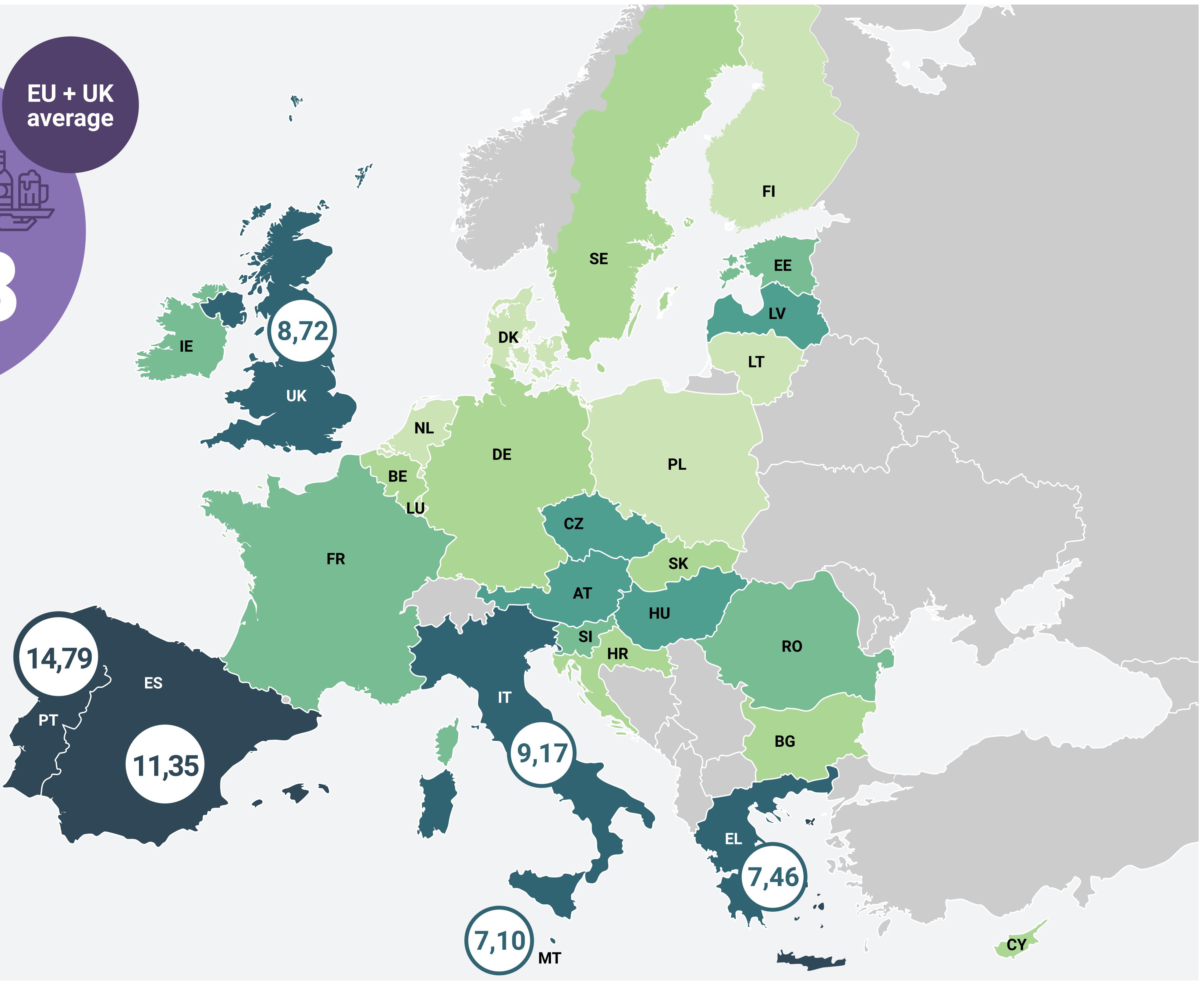
Represents countries with high levels of consumption of one-way glass beverage packaging in HORECA.



## Which countries have the highest consumption of beverages in one-way glass packaging in the HORECA channel (in kg/capita)?

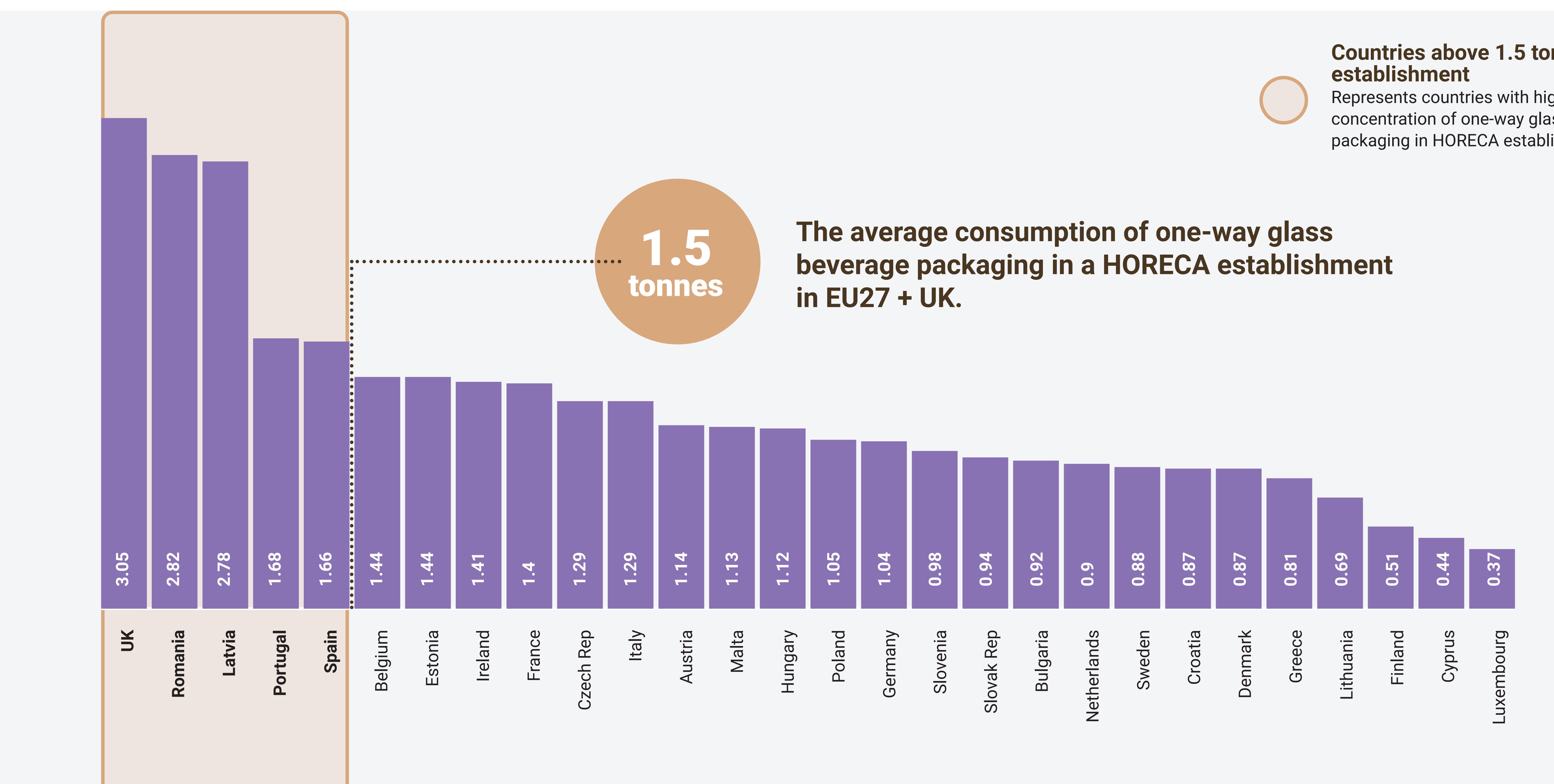
	One-way glass beverage in HORECA (kg/cap
Portugal	14,79
Spain	11,35
Italy	9,17
UK	8,62
Greece	7,46
Malta	7,10
Austria	6,79
Latvia	6,68
Czech Rep	6,67
Hungary	5,37
Ireland	4,94
France	4,83
Slovenia	4,62
Romania	4,18
Estonia	4,07
Cyprus	3,82
Bulgaria	3,79
Croatia	3,49
Belgium	3,01
Slovakia	3,00
Sweden	2,73
Germany	2,63
Denmark	2,41
Netherlands	2,19
Poland	2,13
Luxembourg	1,80
Lithuania	1,35
Finland	1,05
EU + UK Average	5,88





# per HORECA establishment, by country

## Estimated annual average consumption of one-way glass beverage packaging (in tonnes/establishment, estimate made by Oakdene Hollins, based on Global Data for 2019).



#### **Countries above 1.5 tonnes /**

Represents countries with high concentration of one-way glass beverage packaging in HORECA establishments.

## **Priority countries** towards building a roadmap for collecting glass for recycling in HORECA.



Countries with high volumes of one-way glass beverage packaging in HORECA (above 100.000 tonnes). Countries with high concentration of one-way glass beverage packaging in HORECA establishments (above 1.5 tonnes/establishment).

**Romania** 







**UK** 

**Spain** 

Portugal

Latvia

Malta

Austria

Italy

Czech Republic

Greece

Countries with high levels of consumption of one-way glass beverage packaging in HORECA (above 5.88 kg / capita).



## Main barriers to increase collection & recycling of glass in the HORECA channel.



Data quality





#### High levels of ceramics, stones and porcelain (CSP) in the collected glass

#### Inadequate collection methods and logistics









## close the glass loop

