

# Assessing one-way glass beverage packaging in HORECA

2023



**close the  
glass loop**

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



1

HOUSEHOLDS

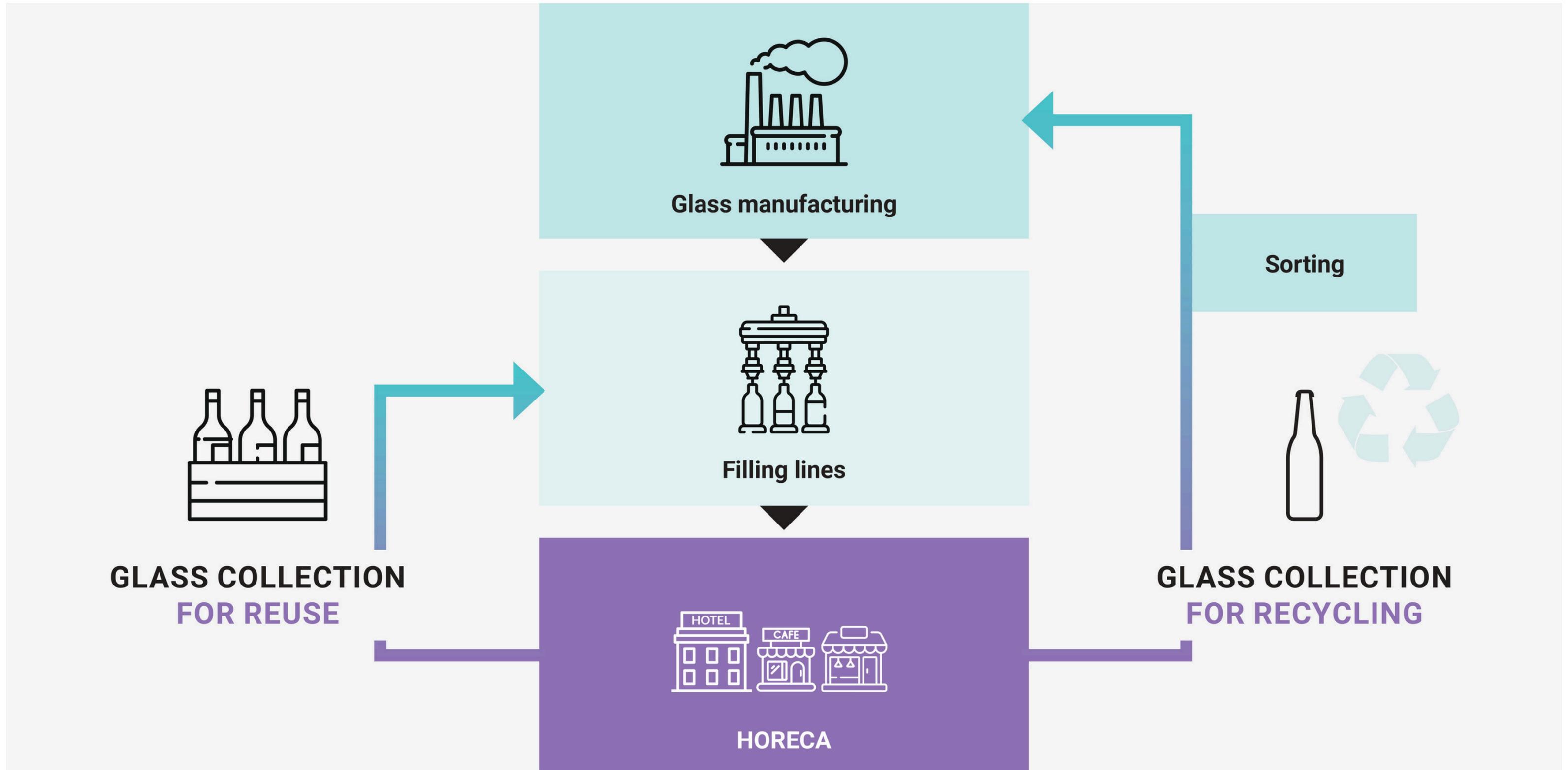


2

HOTELS, RESTAURANTS  
AND CAFÉS (HORECA)



# There are 2 types of glass collection in HORECA.



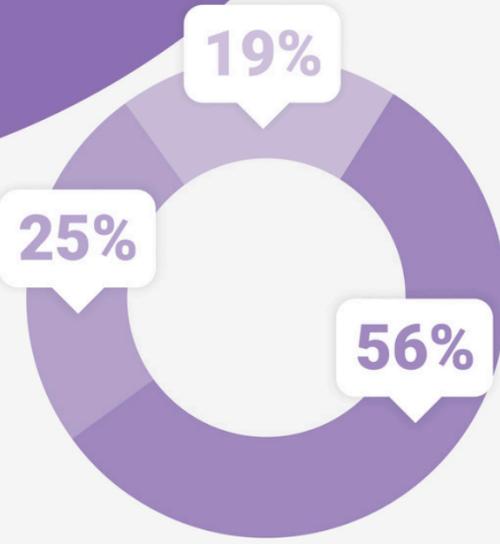
Scope of the study:  
**HORECA establishments and one-way glass beverage packaging.**



**2 million**

There are over 2 million HORECA establishments in EU27 + UK

- Accommodation
- Pubs, Clubs & Bars
- Restaurants

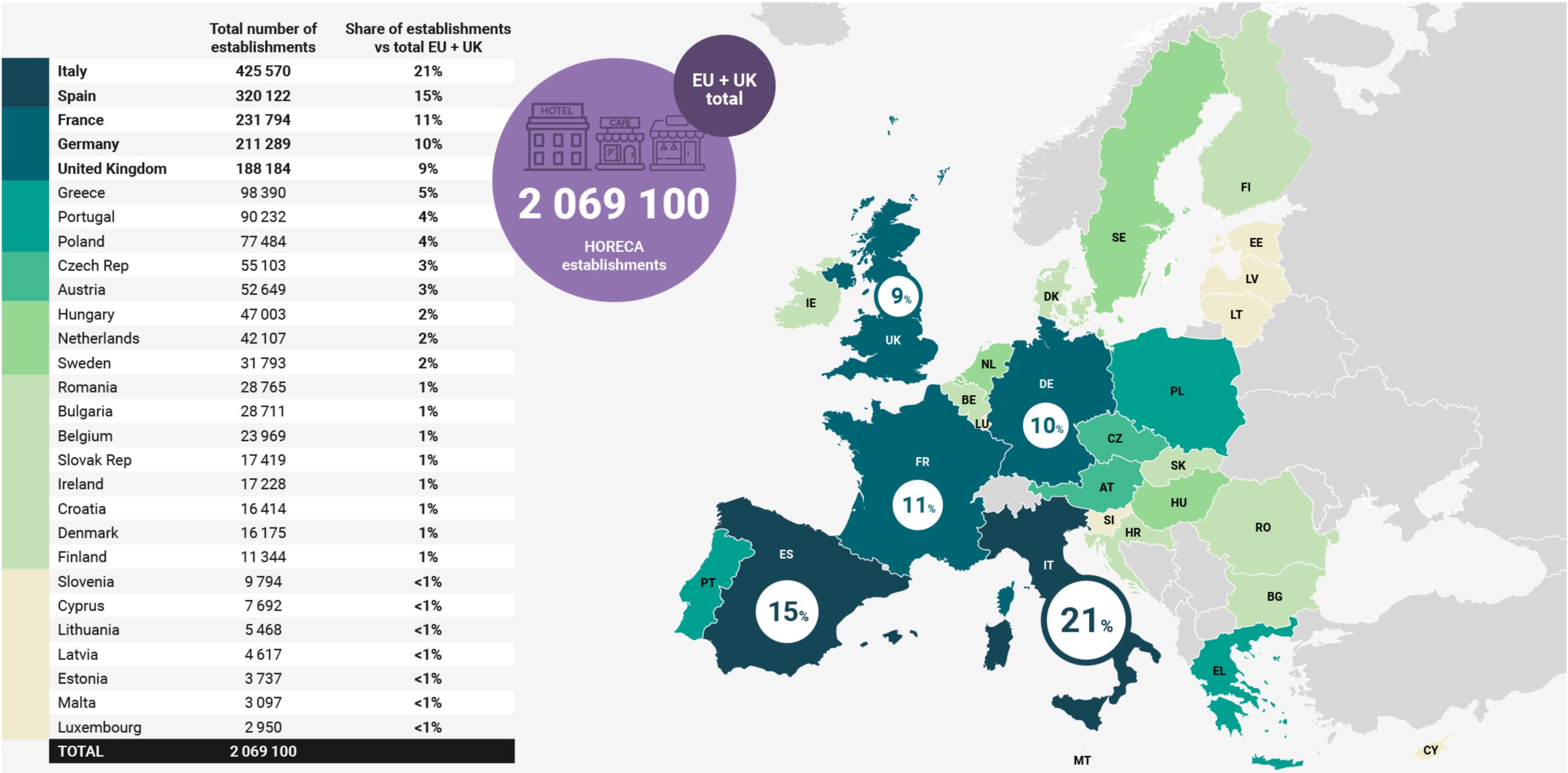


The study by Oakdene Hollins made an analysis of Global Data, which included data on one-way glass placed on the market in the HORECA channel for 4 beverage categories: beer and cider, wines and spirits, non-alcoholic beverages, and packed water.



**1 in every 10 beverage bottles placed on the EU27 + UK market in 2019 was a one-way beverage glass bottle in HORECA.**

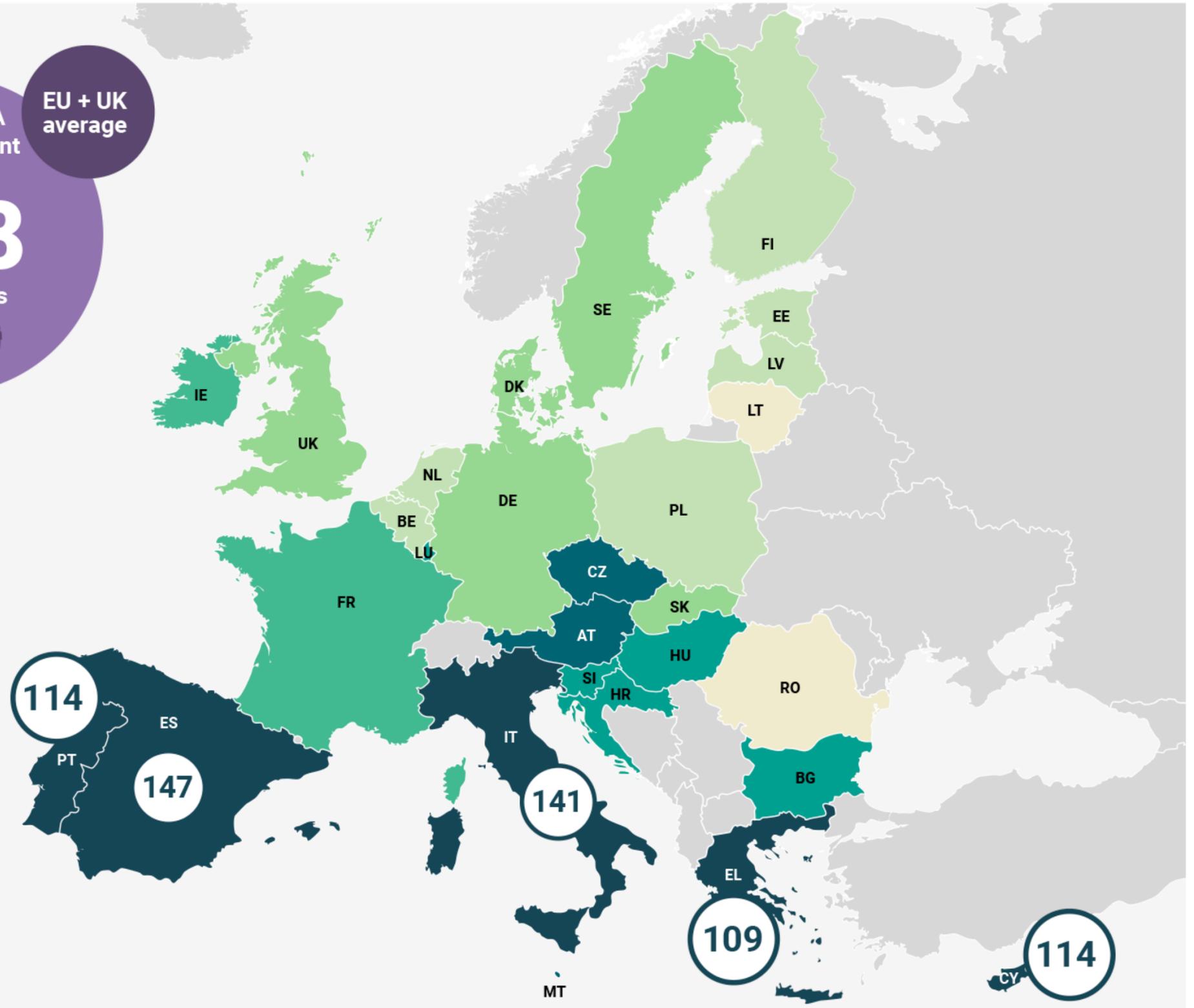
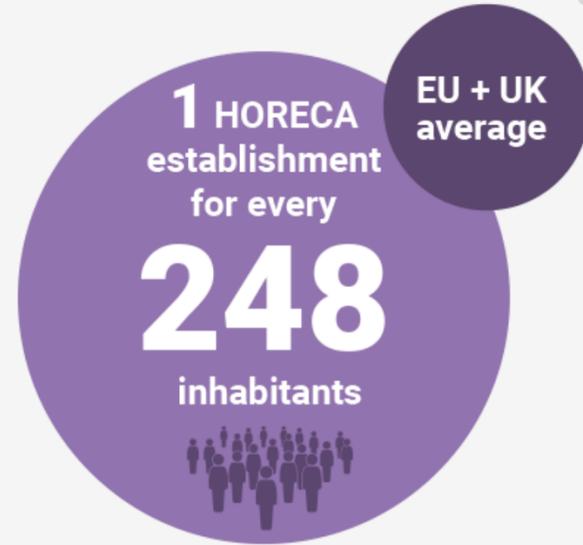
# WHERE DO YOU FIND THE MOST HORECA ESTABLISHMENTS IN EU + UK?



# WHERE DO YOU FIND THE MOST HORECA ESTABLISHMENTS RELATIVE TO POPULATION IN EU + UK?

Ratio = 1 HORECA establishment for every "" inhabitants

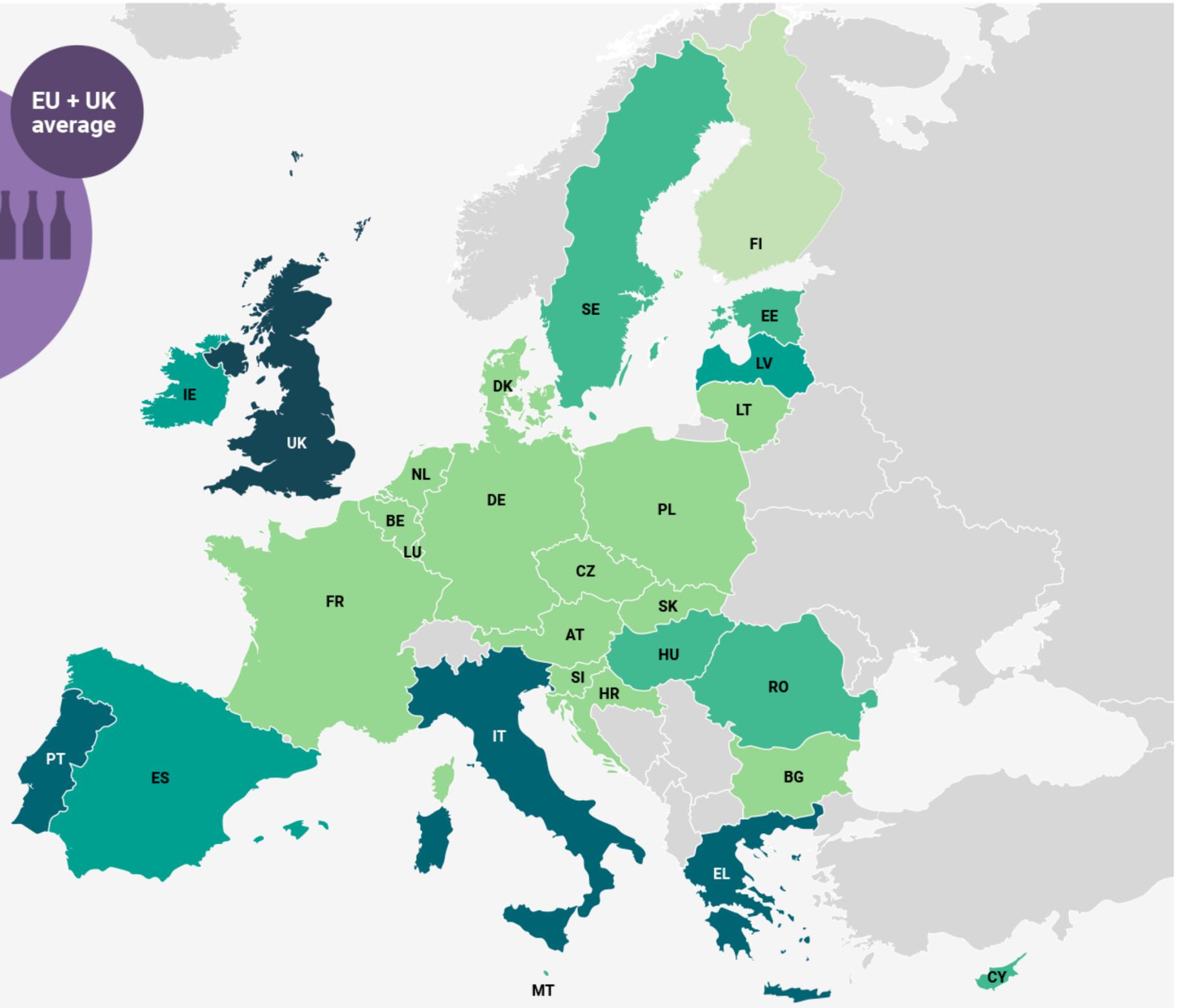
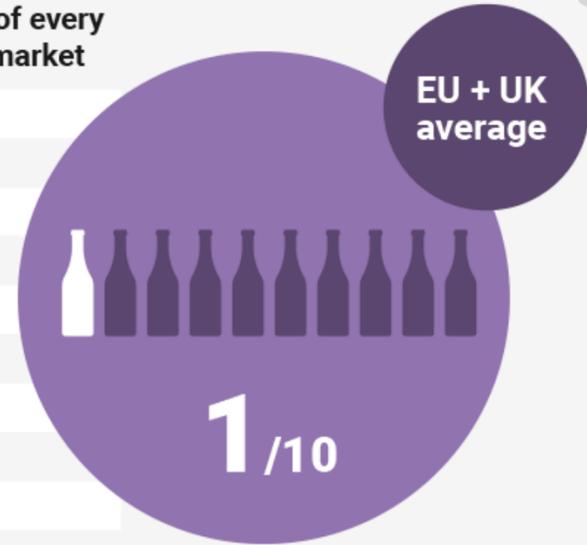
Greece	109
Cyprus	114
Portugal	114
Italy	141
Spain	147
Malta	159
Austria	168
Czech Rep	193
Hungary	208
Luxembourg	208
Slovenia	212
Bulgaria	244
Croatia	248
Ireland	285
France	290
Slovak Rep	313
Sweden	322
United Kingdom	354
Estonia	355
Denmark	359
Germany	393
Netherlands	410
Latvia	416
Belgium	478
Finland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



# 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

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	



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



**17%**

**17,5 million tonnes**

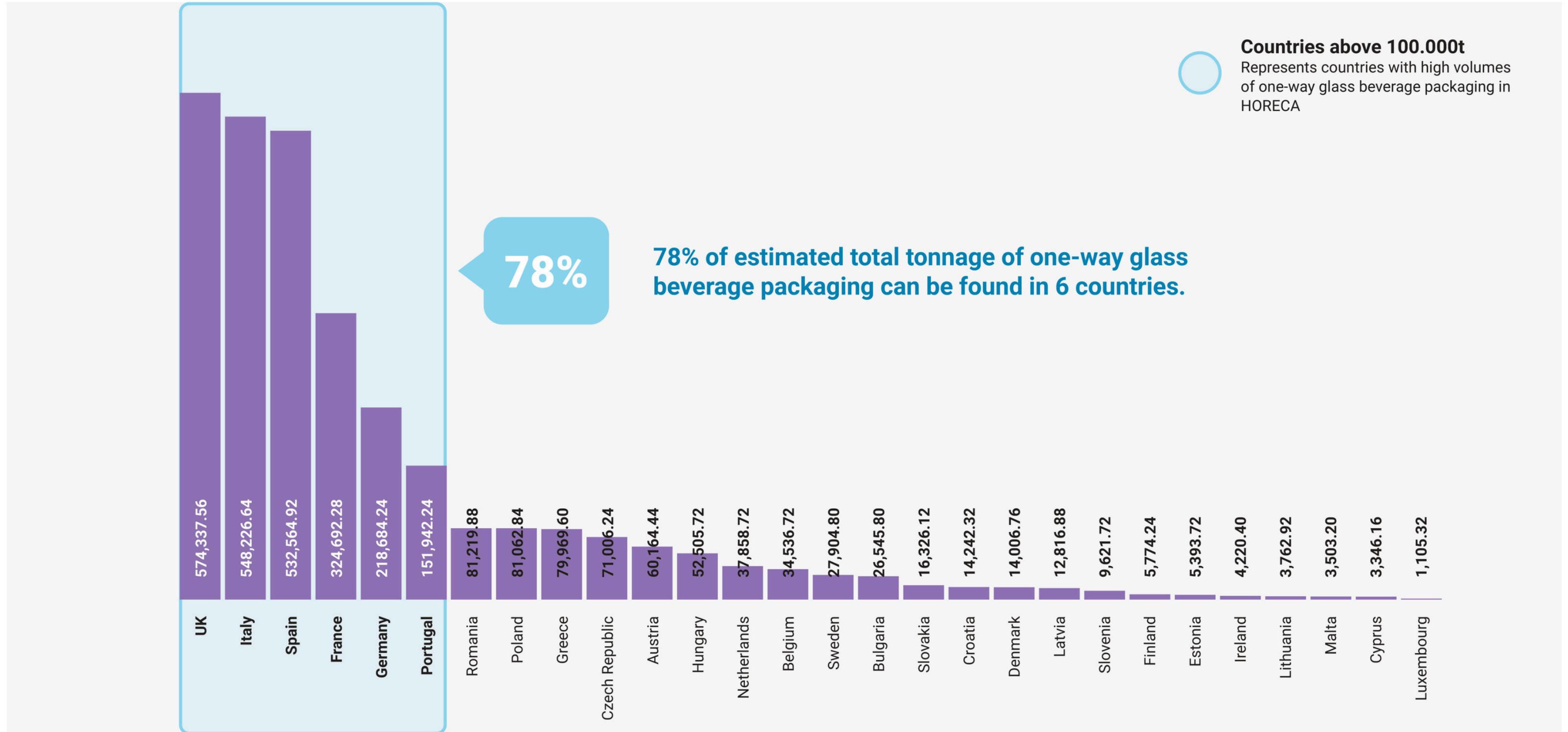
**Total glass packaging placed on the market  
in EU27 + UK in 2019**  
(in tonnes, Close the Glass Loop data)



**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)

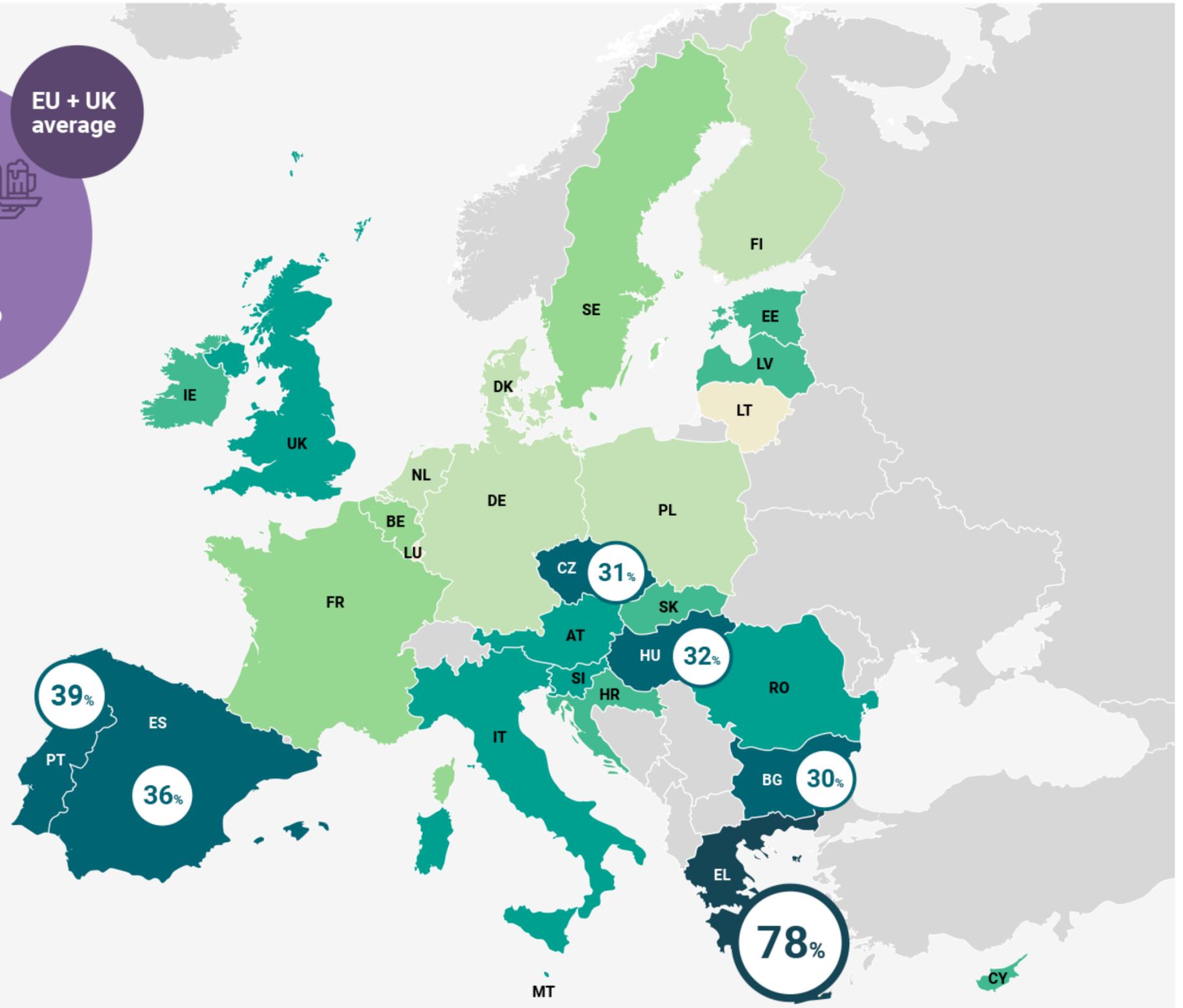
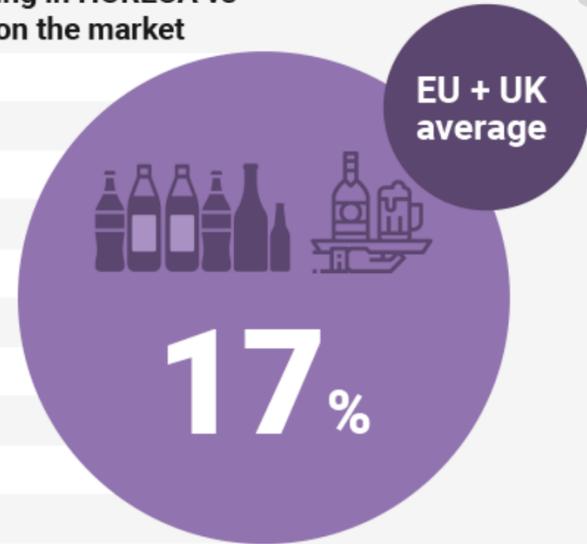
# Estimated total one-way glass beverage packaging in HORECA **by country** (in tonnes, estimate made by Oakdene Hollins, based on Global Data for 2019).



# 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%
Hungary	32%
Czech Republic	31%
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%
France	11%
Belgium	11%
Netherlands	7%
Denmark	7%
Germany	7%
Finland	7%
Poland	6%
Lithuania	5%
Luxembourg	3%
<b>EU + UK Average</b>	<b>17%</b>



**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).



**34,12kg**  
per capita

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

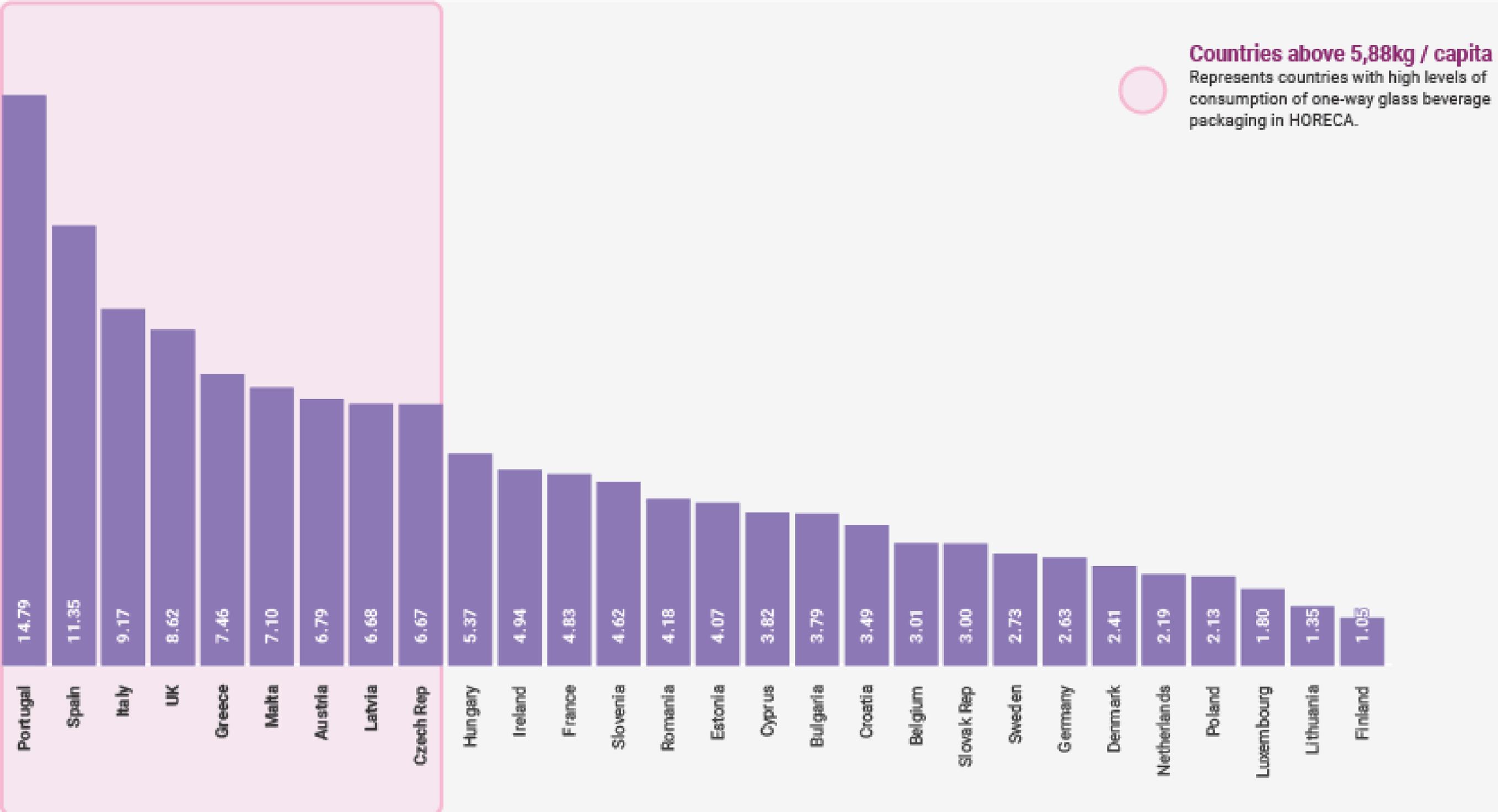


**5,88kg**  
per capita

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



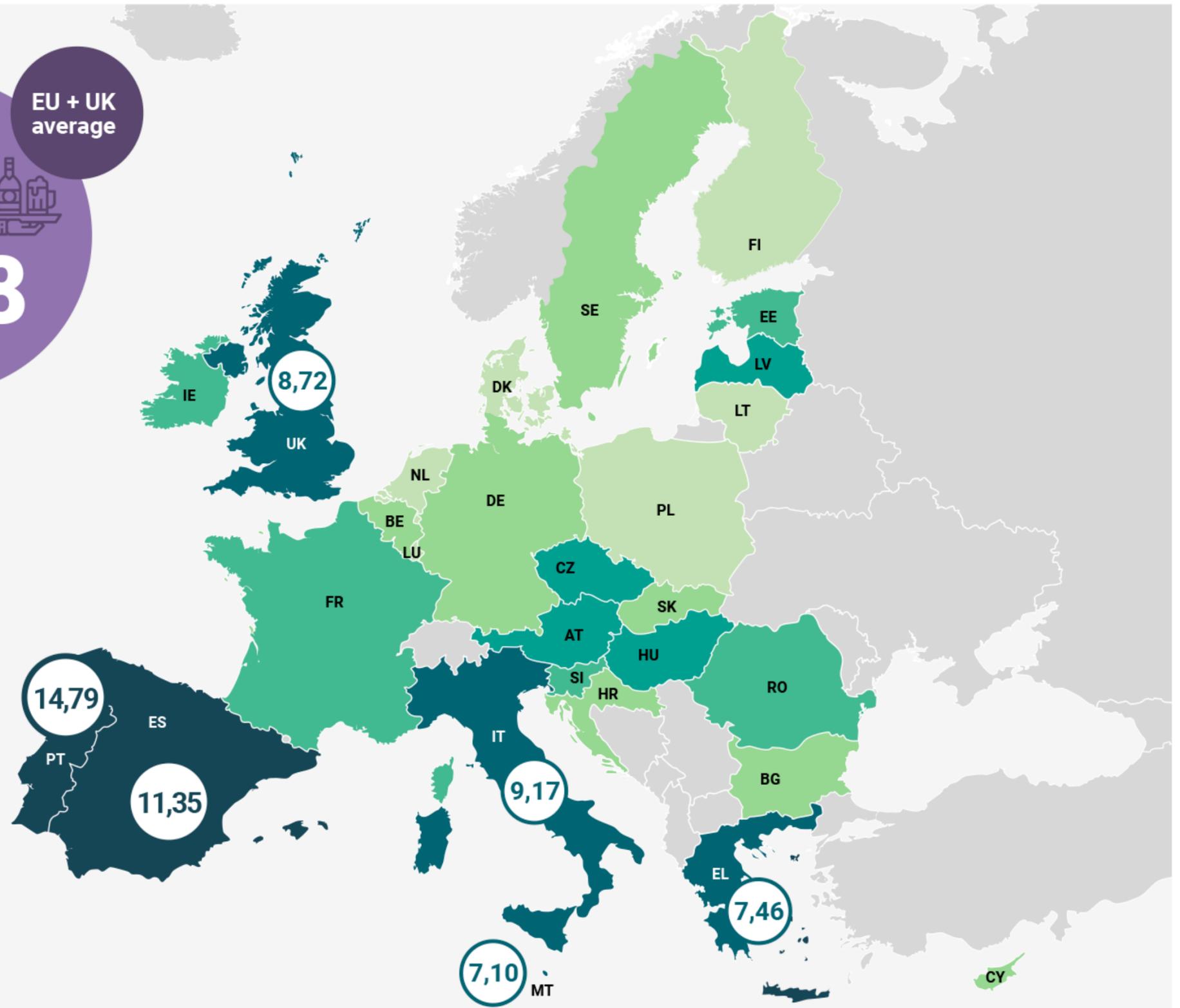
# Estimated annual average consumption of one-way glass beverage packaging in HORECA by country (in kg/capita, estimate made by Oakdene Hollins, based on Global Data for 2019).



# WHICH COUNTRIES HAVE THE HIGHEST CONSUMPTION OF BEVERAGES IN ONE-WAY GLASS PACKAGING IN THE HORECA CHANNEL (IN KG/CAPITA)?

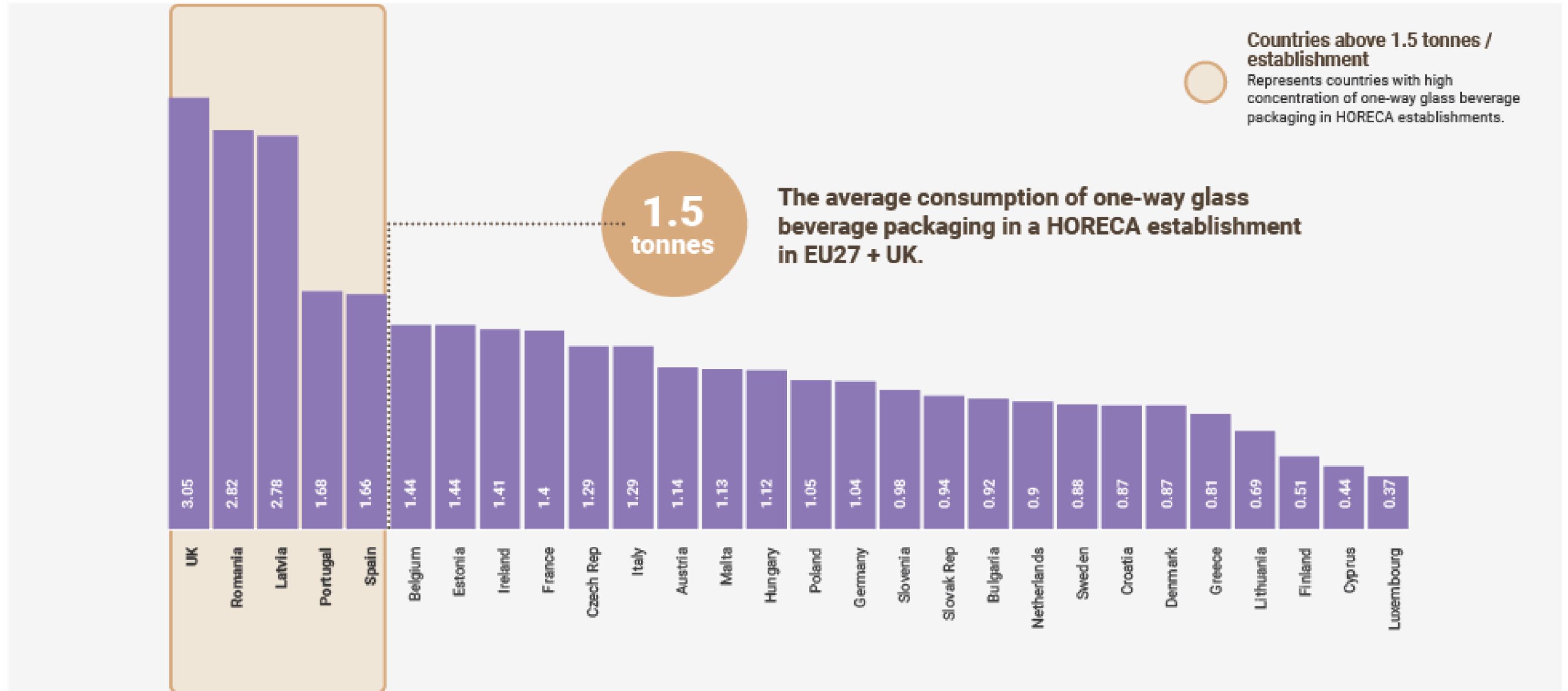
One-way glass beverage bottles in HORECA (kg/capita)

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
<b>EU + UK Average</b>	<b>5,88</b>



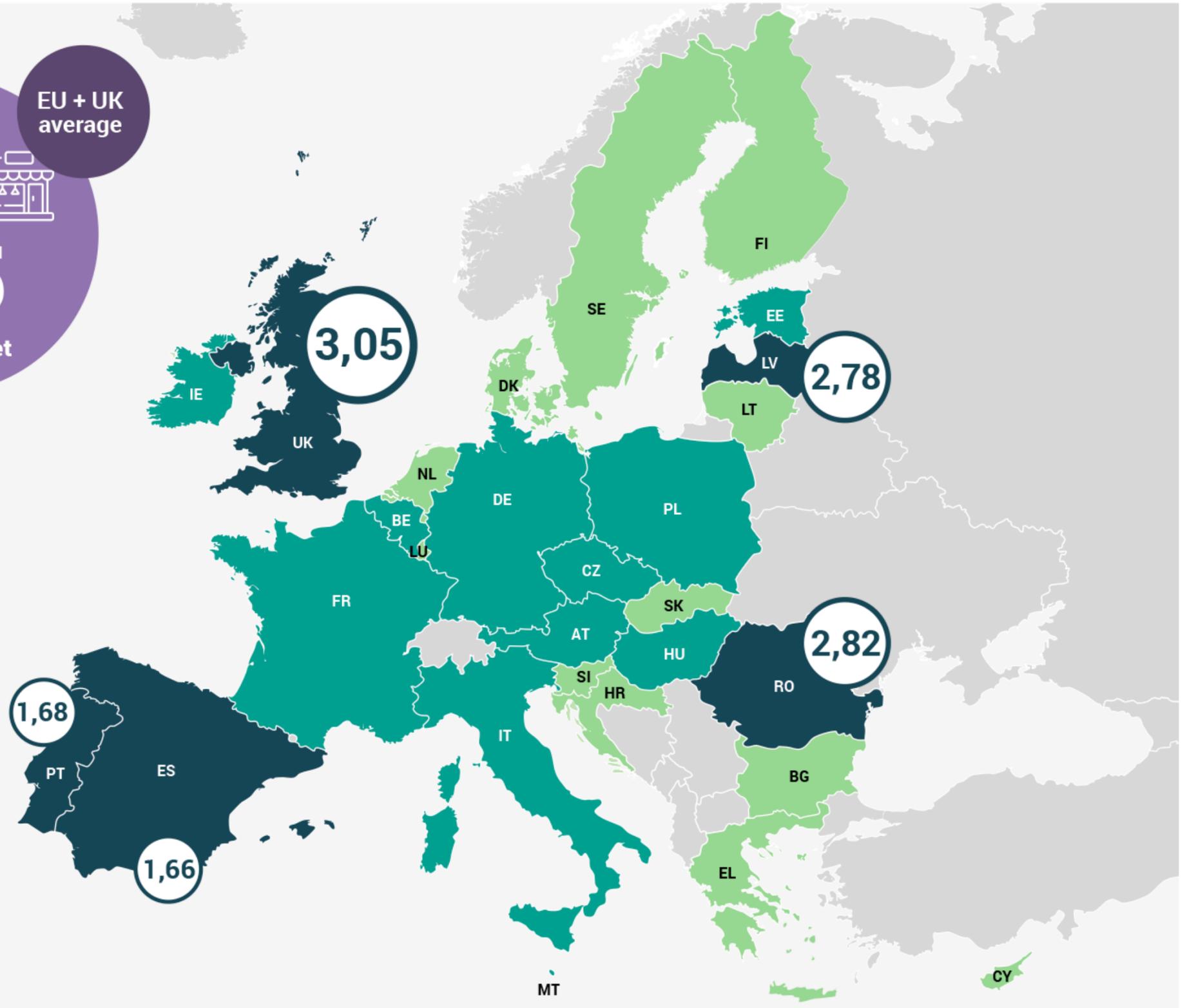
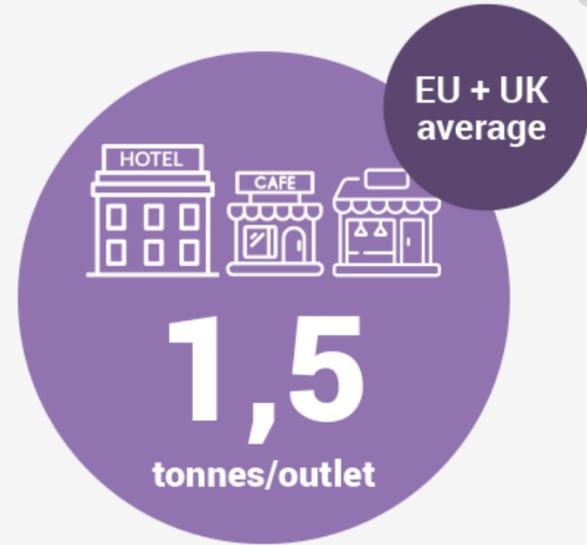
# Estimated annual average consumption of one-way glass beverage packaging per HORECA establishment, by country

(in tonnes/establishment, estimate made by Oakdene Hollins, based on Global Data for 2019).

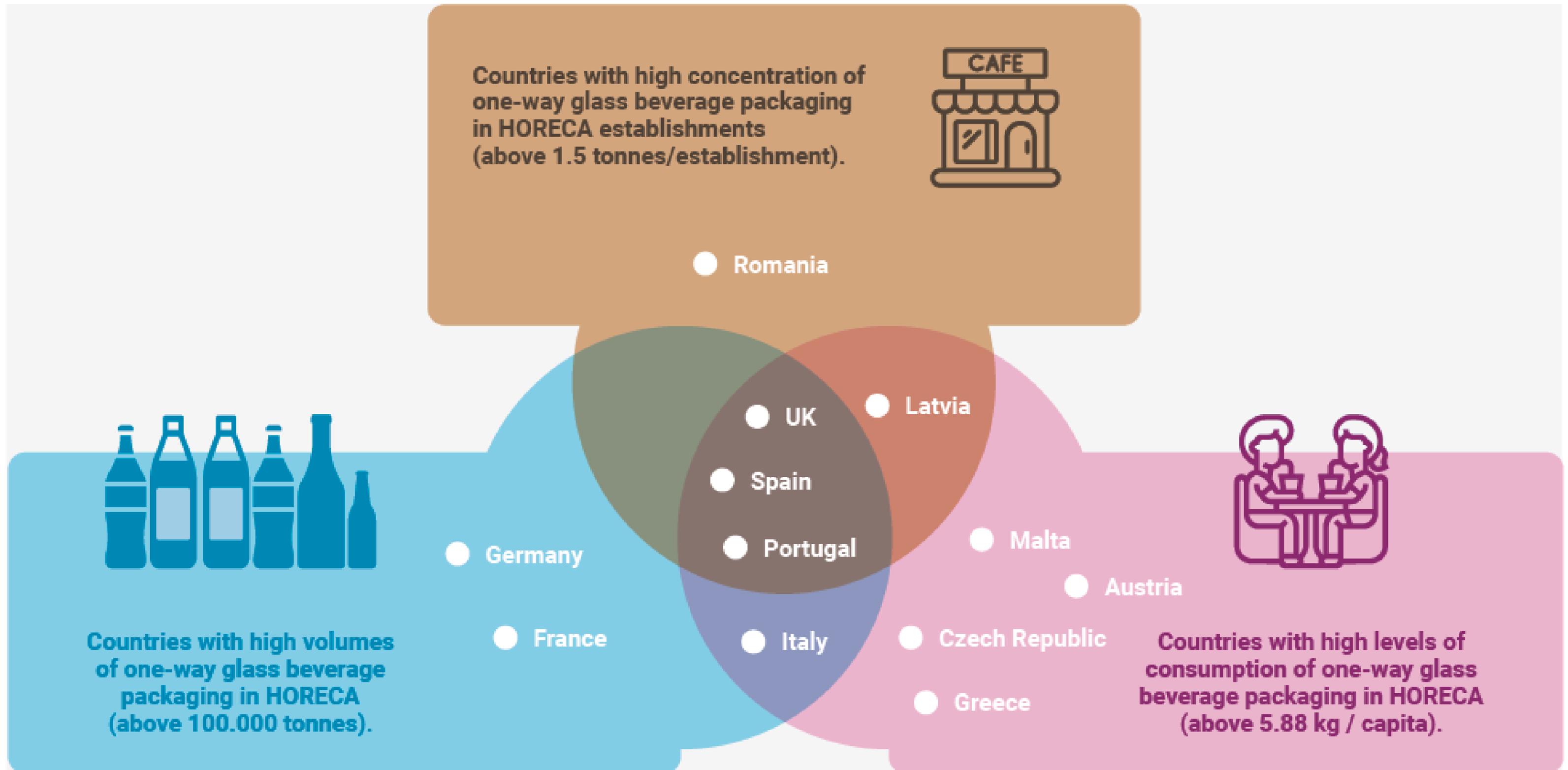


# WHICH COUNTRIES HAVE THE HIGHEST ESTIMATED ANNUAL AVERAGE CONSUMPTION OF ONE-WAY GLASS BEVERAGE PACKAGING PER HORECA ESTABLISHMENT?

	HORECA one-way glass per establishment (tonnes/outlet)
United Kingdom	3,05
Romania	2,82
Latvia	2,78
Portugal	1,68
Spain	1,66
Estonia	1,44
Belgium	1,44
Ireland	1,41
France	1,40
Czech Rep	1,29
Italy	1,29
Austria	1,14
Malta	1,13
Hungary	1,12
Poland	1,05
Germany	1,04
Slovenia	0,98
Slovakia	0,94
Bulgaria	0,92
Netherlands	0,90
Sweden	0,88
Croatia	0,87
Denmark	0,87
Greece	0,81
Lithuania	0,69
Finland	0,51
Cyprus	0,44
Luxembourg	0,37
<b>EU + UK Average</b>	<b>1,50</b>



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





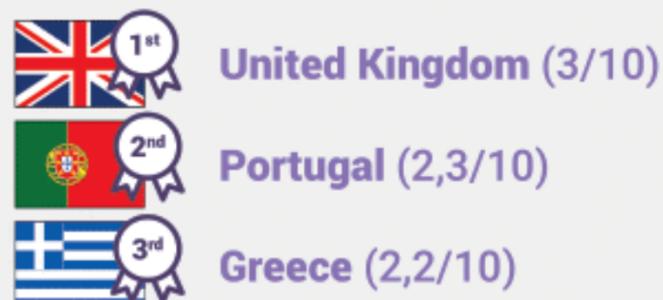
The most HORECA establishments in EU + UK



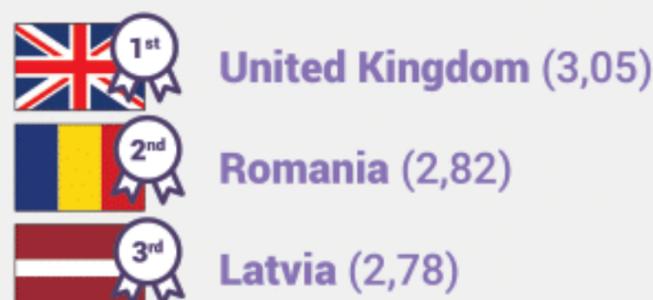
The most HORECA establishments per inhabitant in EU + UK



Number of one-way glass beverage bottles in HORECA vs. all glass beverage bottles (units placed on the market)



Annual consumption of one-way glass beverage packaging in HORECA (kg/capita)



Average annual consumption of one-way glass beverage packaging in a HORECA establishment (tonnes / establishment)



Total one-way glass packaging placed on the market in the HORECA channel in tonnes (2019)

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



**1**

**Data  
quality**



**2**

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



**3**

**Inadequate collection  
methods and logistics**





**close the  
glass loop**