



British Glass

End of year review
2023 — 2024

Welcome from CEO Dave Dalton



Dave Dalton, British Glass CEO

As we reflect on the events of the past year, it's evident the journey of our industry continues to be marked by challenges both anticipated and unforeseen. In the midst of these difficulties, we must also be proud of notable victories and moments that we can celebrate.

Uncertainty around a deposit return scheme (DRS) in the UK nations dominated much of the industry dialogue towards the beginning of last year, with Scotland's intention to exclude glass from the scheme being marred by their delaying of the scheme until October 2025 at the earliest. Work continues in educating both central and devolved governments, alongside the public, on the benefits of keeping glass outside of any DRS to ensure we capture as much glass for recycling as possible.

With access to a steady and sustainable supply of cullet a priority for UK glass manufacturers, it was disappointing to see a rise in the export of unprocessed glass to mainland Europe due to a flawed PRN/PERN system. The impact of these exports has a ripple effect across the industry, from increased carbon emissions to difficulties in reaching recycled content targets for both brands and manufacturers. Having begun our work on educating local authorities and government last year, we continue to build towards a far-reaching project to ensure that manufacturers have access to cullet and glass is kept in the UK.

Although the impacts of the energy crisis continue to be felt across the industry, we are beginning to make

strides towards easing the burden on the industry. The Government have announced the UK Carbon Border Adjustment Mechanism (CBAM) will be introduced in 2027 with glass sector included. Currently, this does not align with the EU CBAM; we will therefore work through 2024 to ensure the best outcome for the UK glass sector.

We continue to strengthen our relationship with government and key decision makers to keep pushing for policy to support the competitive position of the industry. The EII Supercharger, now enshrined in law, means a rebalancing of electricity costs and is worth around £24 -31 MWh reduction in electricity costs to our melters.

Further strides were made towards industry net zero targets, with glass manufacturers making efforts to introduce new furnace technologies to reduce our reliance on non-renewable resources and move towards a decarbonised supply chain. As we move through 2024, we strive towards helping our industry continue to innovate and provide solutions for a greener future.

We are excited for the coming membership year and seeing the strides that are being made towards net zero and a sustainable glass industry. I eagerly look forward to the opportunities that lie ahead and extend my best wishes to all for the upcoming membership year.

Meet the team



Dr Nick Kirk
Technical director



Paul Pearcy
Federation manager



Jenni Richards
Principal policy adviser



Mark Pudner
Senior technical adviser



Theresa Green
Information officer



Matthew Kay
Glass packaging
policy lead



Holly Shackford
EHS adviser



Gareth Jones
Operations and
commercial director



Victoria Adams
Marketing and
communications manager



Meg Grattidge
Events and training
coordinator



Tom Armes
Content marketing lead



Robbie Newton
PR and communication
officer



Callum Hawksworth
Data and administrative
officer

Value statements

Section one - Membership subscription

Consultations responded to on your behalf	15
One-to-one consultations with members	175
Representation of your company's interests at stakeholder/gov forums	431
Enquiries to our information line	118
Press coverage - number of cuttings	814
Press coverage - estimated reach	1,967,207,169
Press coverage - estimated value	£18,196,665

Section two - Environmental policy reliefs

Estimated value of current policy reliefs per annum for UK glass manufacturing members

CCL exemption (2022)	£47,451,715
ETS free allowance (2023)	£54,174,496
RO/FIT/CfD exemption (2022)	£31,092,878
Aggregates levy (2022)	£3,478,985
Total policy reliefs	£136,198,074

Also helped deliver energy cost relief schemes which have helped members with volatile energy prices.

EBRS – 1 October 2022 – 31 March 2023

EBDS – 1 April 2023 – 31 March 2024

Indirect cost compensation for the ETS/CPF for glass fibre members

Glass Focus Awards 2023

The winners of the Glass Focus Awards 2023 were announced at a glitzy black-tie event at the National Football Museum in Manchester.

Businesses from across the glass supply chain came together to celebrate the many achievements of the industry.

Ardagh Glass Packaging took home the British Glass company of the year award along with the sustainable practice award for their NextGen Furnace. The other big winner was Encirc, taking home three awards on the night, including the innovative solution award for their digital bottle.

VitriTech Limited celebrated winning the inaugural SME member of the year award, and other winners on the night included Verallia UK, Beatson Clark, Guardian Industries UK and Saint-Gobain Glass.



Glass Focus
Awards 2023

The full list of winners from the Glass Focus Awards 2023 are:

Design of the year – container (sponsored by Packaging Innovations and Empack)
Barra Gin by Verallia UK

Design of the year – flat (sponsored by The Glass and Glazing Federation)
One Black Friars by Guardian Industries UK

Innovative solution (sponsored by Glass Technology Services)
The digital bottle by Encirc

Health and safety action (sponsored by Glass International)
Hearing protection by Beatson Clark

Strengthening business through people (sponsored by Glass Worldwide)
Rostered training project by Encirc

Rising Star (sponsored by the Worshipful Company of Glass Sellers)
Beata Zalinska at Saint-Gobain Glass

Marketing Impact (sponsored by awesome)
Embedding our mission by Encirc

Sustainable Practice (sponsored by Brook Green Supply Ltd)
NextGen Furnace by Ardagh Glass Packaging

SME member of the year
VitriTech Limited

British Glass company of the year
Ardagh Glass Packaging



Health & safety overview / HR forum

Health & safety overview

Health and safety is at the core of everything we do, and the health and safety forward scheme facilitates a common goal of health and safety improvement across the glass sector. Those participating in the scheme submit annual data, which is presented to the committee as sector statistics and a report is produced for each participant. The statistics also allow the health and safety committee to design an annual action plan targeted at the help members need most.

British Glass represents the industry at the HSE's CHARGE Group, which is a tripartite body with representatives from industry, trade unions and HSE. With representation from the wider mineral industry, we can feed back activities, address wider industry issues, share industry statistics, and raise sector concerns for discussion.

This year British Glass have provided a forum for discussion on best practice, accident statistics and areas of concern. We have continued with work on a PPE review document for the sector to share their positive and negative feedback of various PPE products, with the current focus on gloves. We are also planning a training course for site and transport safety at the HSL in Buxton later in the year. We have continued to support the implementation of new requirements for chemical regulation to transition from EU REACH to UK REACH to ensure continued supply of chemicals.

The 2023 data collection is nearly complete, with 'injured

while handling, lifting or carrying' as the top RIDDOR accident for 2023 taking over from slips, trips and falls which has remained the top RIDDOR accident since 2020. Contact with moving machinery is the second highest accident, followed by exposure to hot surfaces.

HR forum

This year the HR forum has continued to focus on the talent attraction campaign, to attract young people to careers in the glass industry, and the industry diversity report, alongside the sharing of industry knowledge and recommendations.

The talent attraction campaign consists of videos featuring young people in a range of roles across our membership, from design and manufacturing to technical services and glass artistry. British Glass have promoted the videos across our social media platforms, and we plan to produce an overview video to include excerpts from each of the videos we have produced. The videos are available on the British Glass website alongside links to our members career pages. We attended the women in STEM graduate careers fair in Manchester to further promote industry and share the graduate opportunities open in the industry to women in STEM subjects.

The diversity report looked at gender balance, gender pay gap, age and ethnicity. Whilst our industry has a long way to go to be more representative, the report showed some positive progress over the last three years. We will continue to collect diversity data over the coming year.



Holly Shackford at the Women in STEM event in February.

Information services / Trade update

Information services 2023/2024

The British Glass library is the UK's only dedicated library on glass and glass technology. Our publications, reports and trade journals cover over a century of research in the field of glass science and technology.

British Glass members can access this information free of charge and many of our members' overseas divisions are taking advantage of this service too.

This year, our online library has seen great interest in terms of science and research coming from world-wide universities and research establishments alike with over 700 requests for documents received between 1 July 2023 and 29 February 2024. This number doesn't include member requests, which stands around 250/pa.

Separate to the above, each year our information services answer many enquiries from companies and individuals looking for glass-specific products, services, or materials. Noticeably this year, requests for more bespoke glass bottles of all kinds with customised decoration has increased, with customers all over the world learning more about the benefits of using glass. Over the last year the team has made numerous referrals and recommendations to members.

Our online library hub, which highlights over 36,000 dedicated glass abstracts, is available to British Glass members free of charge and can be found on the British Glass website. As well as the online collections, members can also make use of our vast array of British, EU, and international standards collections which can be viewed in our library.

Visit the British Glass online library here:

www.britglass.org.uk/knowledge-base/digital-library-and-information-services

Trade update

British Glass continues to work with members, the Department of Business and Trade (DBT) and the Trade Remedies Authority on matters that impact our members.

Trading conditions continue to be challenging in the light of inflationary pressures driven by higher UK energy prices. At the same time, demand for glass is reducing as the cost-of-living crisis bites and customers de-stock back to pre-pandemic levels.

To support our discussions with members, British Glass analyses trade data published by the UK Government. Imports of all products of glass to the UK fell in 2023 compared to the previous year although the value of the products per tonne has increased. Exports of glass products decreased in 2023 with the exception of Crystal and Tableware where exports increased slightly. UK cullet exports to Europe increased and also showed a significant increase in value (~900%).

Members can access the full sector and subsector 2023 reports and the year-on-year analysis on our website - www.britglass.org.uk/knowledge-base/resources-and-publications

British Glass represents the interests of members at a number of DBT stakeholder groups including on the details of UK Free Trade Agreements and the development of Trade Remedy policy. We continue to support members whose products are subject to trade remedy investigations and applications to the process.

Energy update

Energy policy

The work that British Glass and the Energy Intensive User Group (EIUG) has carried out over the past few years has ensured our members were supported through the energy crisis through government relief schemes (Energy Bill Relief Scheme) and the discount scheme (Energy Bills Discount Scheme).

We have continued to engage with government officials and MPs and have organised visits for Neil Hodgson, Deputy Director Energy Intensive Industries and his wider team.

Energy costs

Energy costs have settled over the last six months, although they are still not back to pre-pandemic levels.

Over the past year, we have been speaking to government departments and have managed to secure the Industry Supercharger scheme which will further reduce the policy and network costs for the glass sector from April 2024. The Department of Business and Trade has estimated these three policy changes will reduce EIs energy costs by around £24-31 MWh. This reduction in electricity costs for the industry could be worth around £24-31m which will help towards electrifying and decarbonising the industry.

Three policy changes under the Industry Supercharger that start in 2024:

1. 100% exemption from RO/FIT/CFD costs – April 2024 (£5 MWh)
2. Capacity market charges reform – Est Oct 2024 – (£5 MWh)
3. Network charges compensation – April 2024, compensation will not be paid till April 2025 (£14-19 MWh)



Neil Hodgson of Department for Business and Trade visited Ardagh Knottingley (pictured) and Saint Gobain Glass.

We are also hopeful that the UK Government may start looking at an electrification business model like the hydrogen business model. The business model would aim to ensure electricity is competitive with natural gas which would enable the glass sector to decarbonise.

Connection costs reduced

From April 2023 Ofgem has changed the connection methodology which means that more of the connection cost is socialised than historically which again should reduce CAPEX costs for increasing the electrical capacity of sites.

Environment

The key focus of our work this year has been on the UK ETS and the proposal for a UK Carbon Border Adjustment Mechanism (CBAM). Early in the year, the government confirmed that the UK ETS cap would be aligned with net zero. This could have led to a sharp decrease in allowances in 2024, however, following consultation additional unallocated allowances were used to smooth the transition and protect free allocation until 2026.

We responded to two further UK ETS consultations on free allocation and UK ETS market mechanisms. These will determine the level of free allocation sites will receive between 2026 and 2030 and how the market responds to sudden and sustained increases in allowance prices. The next stage in the process will be the publication of the carbon leakage list and subsequent consultation.

In December 2023 HMT announced that the UK would introduce a CBAM in 2027 which will include glass products within its scope.



Shadow Secretary of State for Energy Security and Net zero Ed Miliband and MP Dame Rosie Winterton visited Ardagh Group's glass manufacturing facility in Doncaster.

Since the announcement, we have been engaging with HMT and DBT to discuss the proposals. We will be working with the Carbon Leakage Working Group to prepare a consultation response and determine the potential impact for each sector.

Numerous policy papers and consultations on decarbonisation were published during the year. We responded to the call for evidence on electrification and consultation on hydrogen blending and the design of phase 3 of the IETF. The long-awaited Biomass Strategy was also published setting out priorities for future biofuel use. We are currently working with the Climate Change Committee on the industry section of the Seventh Carbon Budget.

We are in the process of updating our net zero strategy and have been visiting members to discuss decarbonisation and progress since it was published. The update will be published in Summer 2024.

Over the year we hosted several site visits including Ed Miliband (Labour), the Chair of Ofgem and DESNZ (Department for Energy Security and Net Zero).

We worked hard to negotiate new Climate Change Agreement targets for the next period, reducing the proposed energy reduction target from 10% to 6.67%. Allowing our members in the scheme to have a more achievable energy reduction target over the next 2 years. We will continue to push for realistic energy efficiency targets and minimum administrative burden in future target periods.

Other areas of work this year included engagement with the Mineral Products Association and the mineral planning authorities on silica sand. As part of this work we will be providing input to the revision of the Silica Sand Mineral Planning Factsheet produced by the British Geological Society. We also continued to monitor developments in environmental permitting regulations and UK REACH.

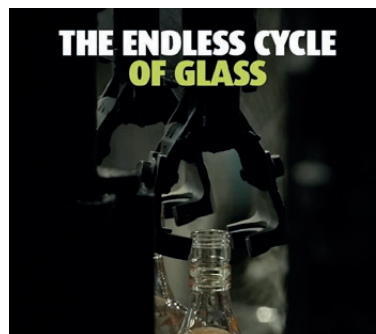
Packaging communications

Last membership year, the Packaging communications group saw several activities through British Glass and Friends of Glass with our target being to improve consumer awareness and perception of recycling.

With our ongoing social media partnership with Kate Jones (@amy_plastic_free_home), we've seen posts, reels, competitions, and polls with outstanding reach and engagement. The quality content developed led to a reach of over 100,000, with reel plays over 60,000. Kate's work focussed on several features of glass, including its recyclability, reusability, and its place in social wellness.

We released our "Endless Cycle of Glass" video, which documents how a glass container works its way around the loop of recycling in the UK to go from disposal to being back on the shop floor within 30 days. This resource serves as a valuable educational piece going forward and will be linked with further activations in 2024.

Glass Guardians, the Friends of Glass in-school resources for children aged 5-11, saw its fifth year come to a conclusion. With continued positive feedback from



teachers and targets met on engagement and plays of the in-classroom game, we're pleased with the sustained success of Glass Guardians.

Our "Maximising the Sustainability of Glass" brand guide was launched in conjunction with our Recycling Summit. The guide is freely available for brands of all sizes to ensure the packaging they produce or select is as sustainable as possible. Our Recycling Summit saw guests and speakers from across the glass value chain, and the attendance of the event was one of British Glass's highest recorded for an in-person conference.

In conjunction with Grayling, we had an excellent year of press coverage. 97 pieces of coverage including print, online, and broadcast led to an estimated 27,000,000+ total reach with an overall very positive sentiment rating.

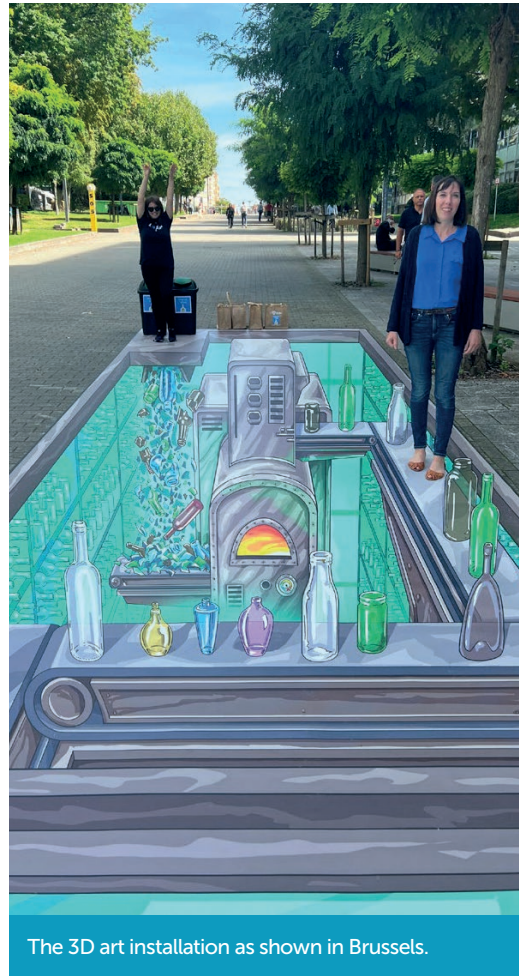
We're proud of the successes that were achieved through our activations in 2023, and we look forward to what we have planned for 2024.

Upcoming communications campaigns

We've got a lot of exciting plans for the coming membership year across British Glass and Friends of Glass, with themes ranging from highlighting decarbonisation efforts across the industry to promoting the health benefits that glass containers provide.

This spring we're kicking off year 6 of Glass Guardians, our in-classroom activation that provides resources for children aged 5-11. This year, we're completely refreshing the design of the physical portion of Glass Guardians in order to drive increased registrations and continue the significant interest we've experienced over the previous years from schools and teachers alike. Recruitment and reminder emails will also be sent with tighter links to calendar hooks such as Earth Day, to keep Glass Guardians relevant to school curriculums throughout the year to achieve our engagement targets.

An expansive project involving refill stores in the UK is also underway, with 3rd year students from Sheffield Hallam University currently undertaking research on the rise of the store format which encourages consumers to refill glass containers rather than use single-use plastics. Later in the year, this information will allow us to build a directory of refill stores, promote them on Friends of Glass social medias, and begin developing the "Glass Champion" sustainability commendation which will be available to individuals and businesses that support the use of glass containers.



Making use of resources provided by FEVE, we're producing a 3D art installation that will be hosted across several venues in summer. This will aim to provide consumers with a chance to follow a glass container through the recycling process, whilst busting myths that exist around glass recycling. This will also link back to our "Endless Cycle of Glass" videos, which consumers will be pointed to for further information, and the bright design of the art project will be perfect for British Glass, manufacturers, and consumers to post on social media.

We're continuing to work with eco-influencer Kate Jones (@my_plastic_free_home) from April onwards, to further promote glass as the environmentally friendly option on social media due to its infinite recyclability and reusable characteristics. Kate will also cover the health benefits of glass, and where it can be used to contribute to a socially positive lifestyle.

Finally, we're planning on showing the world what our vision is for the future of glass packaging. This creative storytelling campaign will focus on how glass fits into society in 2050, with a focus on decarbonisation, health, and recycling. Launching with a short video and supporting graphic social campaign to set the scene, we'll follow this with storytelling throughout the year with thought leadership pieces, case studies, and highlighting political work to showcase how we will reach our vision.

Recycling committee

Policy and EPR

The Recycling Committee continues to work closely with the PCG examining areas such as PRNs, EPR, simpler recycling, DRS, reuse, and EU regulations. PRN activity has become a focus for British Glass working with stakeholders on the policy reforms to maximise close loop recycling in the UK and reduce the quantity of unprocessed waste glass being exported to stabilise the PRN market.

British Glass has been providing briefings and making representations to key stakeholders in DEFRA and local authorities. This work will be expanded in the next year with an increased focus on local authorities and brands. Margaret Bates from OPRL has been announced as the interim head of the EPR scheme administrator, a move British Glass welcomes, and we maintain good relations with her both directly and through the Packaging Federation.

Though EPR data reporting legislation has been going through Parliament, full implementation of EPR working to an extremely tight timeline with potential for delay, adding further emphasis to PRN reform. British Glass will continue to push for a collection and recycling system that works for businesses, the public, and the environment. EPR modulated fees will be based on recyclability in 2026/2027 with British Glass submitting a response to the Recyclability Assessment Methodologies (RAM) consultation. A model is expected to be published in summer 2024.

Close the glass loop

The recently released WRAP Roadmap to Closed Loop Glass Recycling supports our aims of separate glass collection. This is an excellent report that supports the argument for improved glass collections for increased closed loop recycling. This report has already been cited and we are using

it to highlight this to stakeholders when discussing the Simpler Recycling pending policy which announced that local authorities can collect all dry recyclates commingled. Unfortunately a retrograde step, but we now have strong evidence to strengthen our discussions with local authorities and other stakeholders in the collection and recycling infrastructure. We continue to work with colleagues in the other material sectors to emphasise the poor outcomes from this.

DRS

Within the UK, DRS remains a key focus area and we have heavily lobbied politicians, especially in the Labour Party as they have not declared their position on DRS, at both UK level and devolved administrations. Wales remains dedicated to inclusion of glass with Scotland only reluctantly accepting exclusion of glass due to the Internal Markets Act. Interoperability is the key stumbling block between the nations and it is now rumored the scheme will be delayed until 2028, which is both an opportunity and a worry as it gives leeway for a new Government to start over with a potential of glass inclusion.

The recently passed EU Packaging and Packaging Waste Regulations will affect many of our members and we contributed to discussions on these through membership of FEVE. Pleasingly the regulations did not mandate glass to be included in DRS schemes, in fact DRS itself wasn't seen as necessary to increase glass collections as other collection methods such as EPR schemes would be able to deliver effective collection, a point we will emphasise when discussing a UK DRS.

Technical committee / Flat glass

Technical committee

British Glass was successful in securing an indefinite extension for the recognition of the reverse epsilon for placing measuring container bottles on the GB market. The UKCA marking had been due to replace the reverse epsilon at the end of 2024, with a labelling easement in place to allow the marking to be applied to the pallet label until the end of 2027. The legislation for the extension is expected to be laid in Spring 2024.

The Technical Committee completed the revisions of British Glass technical documents TEC4, TEC 7 and TEC 9. The technical documents are available free of charge to British Glass members and can be requested via information services.

BRCGS started work on Issue 7 of the Packaging Materials Global Standard. The standard is expected to be published in October 2024 and the Technical Committee will update the glass guideline to accompany the new issue this year.

British Glass was represented at numerous Cete working groups. The new group on reuse, which is developing a set of guidelines for reusable glass containers and associated documents on labels, inks, glues, cleaning and sterilisation has been very active. We also attended the launch of a new group on design for recycling.

We continue to follow developments in EU legislation that could impact glass containers we export to the EU. Agreement was reached on the EU Packaging and Packaging Waste Regulation and we expect further guidance to be published on the requirements for the technical document to justify packaging weight. The revision of the Ceramics Directive which will include new limits for migration of heavy metals from glass was postponed until 2025.

Flat glass

We have continued to engage with stakeholders about the benefits of recycling flat glass and have worked with Nottingham University who produced a report on: "Enabling business models innovation for sustainability in the UK glass sector" this report focus on the policy and behaviour changes needed to increase flat glass recycling.

Over the past 12 months, we have been working closely with the Glass and Glazing Federation to promote the benefits of high efficiency glazing as well as responding to the Future Home Standard consultation.

We need to continue to work with government departments to ensure glass is removed from the lower rate of landfill tax and that more glass is remelted back into glass products. Although we have not been able to get any changes, His Majesty's Treasury did state that some products in the lower rate may need to be re-classified to incentivise recycling.

We have also been working on the following priorities decided by the Flat glass committee late last year:

1. A report of the inputs and outputs of flat glass in the UK to identify the opportunity to increase flat glass recycling.
2. Lobby HM Treasury to remove glass from the lower rate and ban glass to landfill, including meetings, letters and a publication with an infographic aimed at decision makers.
3. Agree on an EPR model that is suitable for flat glass that can be shared with DEFRA by the end of June 2024 to provide evidence to decision-makers.
4. Review existing quality standards of collected and recycled flat glass.

Publications

Over the last 12 months we have released a number of publications which can be viewed on our website.

1. We released the Maximising the sustainability of glass guide in collaboration with members early in 2023 gaining great interest from several brands and retailers.
2. The British Glass policy position was produced to support our lobbying activities as we await the next general election. The paper outlines the key policy recommendations for the glass industry.
3. Our keeping glass recycling local briefing paper was produced to advise local authorities of the exportation of unprocessed glass waste and the importance of keeping this in the UK.
4. We worked alongside WRAP to produce a roadmap to closed loop glass recycling to support our aim to achieve a 90% collected for recycling rate.

For more information or to view these publications, click the links on the images or visit britglass.org.uk





Glass Focus Awards 2024

SAVE THE DATE

This year's awards event will be held on
21 November in Leeds.



Join the waiting list to be the first
to get an early bird discount

www.britglass.org.uk/glass-focus-24



British Glass





British Glass

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