



British Glass

A review of activity for the membership year ending 2017

From uncertainty to opportunity



Dave Dalton
Chief Executive,
British Glass

In the past year we've seen monumental changes in the global political landscape: Brexit becoming a reality, a new UK Prime Minister and Donald Trump elected in the US. But these shifts are now providing opportunity from what was uncertainty.

Significantly for our sector, Theresa May's restructuring of government integrated DECC and BIS to create the single Department for Business Energy and Industrial Strategy (BEIS). This was swiftly followed by the launch of an industrial strategy consultation.

We are optimistic this is positive: a single place to conduct our business as manufacturers, and hopefully a sensible platform for economic regeneration. For the first time in generations the climate appears ripe to encourage those sectors with ambitions to prosper. I believe glass can push towards the front of the queue to gain support in achieving those ambitions.

I am determined to see the current opportunities drive sustainable investment and growth, not simply fuel environmental arguments that stifle growth. Improving resource and energy efficiency are longstanding competitive priorities for glass. We have already proved we are able to decouple productivity from environmental emissions. And with our existing sector-wide collaboration and ongoing positive dialogue with BEIS, we're ideally placed to put our sector ahead of the game, and its rivals, in the race to inform the government's industrial, trade and environmental strategies.

Our sector is better positioned than ever to emerge from the shadows, partner with a more progressively tuned government, and lead glass manufacturing and its supply chain to a prosperous future. These are defining times – and I hope you will work closely with me, and the British Glass team, to help secure our sector's future.

Inside...

**Apprenticeships
forum**
Page 2

**Decarbonisation
action plan**
Page 4

**REACH-ing a better
understanding**
Page 7



New president of British Glass

At the November members' meeting Adrian Curry, Managing Director of Encirc, was unanimously voted in as president of British Glass.

Adrian succeeds Davia Walmsley, Creative Director of Daedalian Glass Studios, who will serve as vice president to provide continuity. Accepting the role Adrian said:

"I look forward to working closely with the board to promote the endless possibilities of glass as a material. A key focus of my term will be driving the industry to become more sustainable."

Apprenticeships Levy

British Glass hosted a forum for glass industry HR leads in December 2016, focussing on the Apprenticeship Levy.

Facilitated by education and training provider RNN Group, the session revealed a far more user-friendly and financially valuable scheme than industry had expected from media coverage.

"To remain competitive and progressive we need a workforce that's properly trained with technical, commercial, management and leadership skills. I urge all parts of the glass supply chain – and we will support our members – to get the best value for their business from this new scheme."

Dave Dalton, British Glass Chief Executive



Energy costs and security

Ensuring the glass industry gets a fair deal on energy costs continues to be a priority for British Glass.

Our unique access to actual industry data, combined with our in-house expertise in energy regulation and markets has been a vital asset in providing evidence for constructive debate with policy and decision makers.

Throughout the last year we have lobbied to achieve the maximum relief from the renewables obligations and feed in tariffs (ROFITs) scheme for electricity supply, with the anticipated move from compensation to exemption.

Our sector continues to benefit from the £18m relief from the Climate Change Levy, which British Glass successfully worked with government to achieve, and we continue to support members in maximising available relief. Protecting this exemption will be a priority focus for British Glass during the UK's EU exit negotiations.



Glass products

Our understanding of glass chemistry, technology, manufacturing and markets is continuously in use to strengthen the position of glass products.

For example, we're working with the Glazing Supply Chain Group to give the public better information and assurance when they buy. This will stimulate the market for speciality and high-performance glass, in turn ensuring that households get the best return on their glazing investment and that the contribution of glass to a sustainable built environment is recognised.

On container glass, our work with the European Commission on regulation of food contact materials continues. This has included providing evidence that has seen glass rated as of minimal food-contact risk and so deprioritised in the Commission's review of packaging materials.

Carbon emissions trading

This year we've worked closely with our manufacturing members to negotiate a strong sector-wide position for phase IV of the EU Emissions Trading Scheme (ETS) and so minimise the impact on UK manufacturers' competitiveness.

The mechanism for the UK's participation in future emissions trading is far from clear as we leave the EU. British Glass will continue to use its unique access to sector data, and close relationships with a range of industry groups, to analyse options and implications. This includes setting out to the UK government the key principles by which any new scheme must operate if UK business is to be able to grow and compete internationally.

3

O-I Harlow visit gets government up close to glass

O-I opened the doors of its Harlow plant to government officials from DECC and BIS in July 2016.

The visit, coordinated by British Glass, was a chance for those working on the EU Emissions Trading Scheme and the Decarbonisation and Energy Efficiency Roadmap action plans to better understand how current policy decisions play-out in practice – by experiencing glass production in action.

"The government staff made full use of the opportunity to ask questions and reach a better understanding of the process and all its complexity – in terms of technology, quality and safety. The O-I team explained the impact that the various proposals for EU ETS to 2020 and beyond would have on a container plant like this. We were able to stress the importance of recognising competition issues between materials."

Jenni Richards, British Glass' policy lead on EU-ETS



Decarbonisation action plan

Reducing carbon emissions is, and will remain, a key strand of business resilience for all manufacturing. Coordinating development of the UK glass decarbonisation action plan, with manufacturers and government, has been a key strand of British Glass activity in the past year.

This work has identified increased use of cullet, waste heat recovery and wider energy efficiency as having great potential to reduce CO2 emissions from glass manufacturing. While developing the action plan, British Glass has pressed the industry's case with government and secured a promise of funding to help glass manufacturers implement waste heat recovery (WHR) systems. Phase one will part-fund impartial feasibility studies at individual site level – enabling members to determine the best fit for their plant and business. A second phase is expected to support capital costs for pilot installations.

We now have a powerful blueprint for achieving change, with shared areas of focus that are specific, practical and solution-focussed. British Glass is wholly committed to helping government and the industry continue progressive decarbonisation.

4

Waste heat recovery knowledge exchange and funding



In November 2016 more than 40 specialists from the glass industry, academia and policy took part in a British Glass knowledge transfer seminar about waste heat recovery technologies.



Presentations from global waste heat recovery (WHR) technology providers Zippe, Air Liquide, Area Impianti, PraxAir and Heliex were given alongside information about uses of waste heat, policy and funding.



"This arena, with interested parties from different perspectives coming together, has created a strong technical focus – very different to when you meet these companies individually at trade shows."

Graham Lax, Head of Project Management, Beatson Clark

Cullet supply

British Glass is working on a several fronts to increase the availability and quality of cullet for glass manufacturers, and so realise the associated benefits around energy efficiency, reduced emissions and sustainability.

In relation to building glass, we are the lead on glass for the 25-partner European funded FISSAC project, which aims to create sources of raw materials from industrial/construction waste. European data shows that most refurbishment and demolition glass waste – if it avoids landfill – ends up as aggregate. We are researching how recycling glass from refurbishment and demolition projects can be made practically and financially viable.

From a packaging perspective, we're engaging with brands, retailers, local authorities and consumers to improve understanding of the benefits of, and barriers to, glass recycling. This year that has included:

- presenting at the Collection Conference – a waste management event looking in depth at the key issues around running efficient and effective waste and collection services
- running pilot projects with two local authorities to engage consumers and increase domestic glass recycling rates
- working with Recycle Now and WRAP to create a Glass Recycling Resource Guide for local authorities
- engaging wider consumer audiences through the *Endless lives of glass* campaign and specific initiatives with bloggers and ambassadors
- partnering in an EU-wide glass recycling attitudes survey and qualitative research.



Supporting innovation – Enviroglass

A research project supported by the British Glass' Energy and Environment Committee is investigating transforming waste into an economically and environmentally sustainable material for glass production.

Melting raw materials accounts for 70% of the energy use and carbon emissions of glass manufacturing. Glass Technology Services Ltd and Sheffield Hallam University are combining their knowledge and expertise to identify and trial raw material mixes that allow glass to melt at a lower temperature, requiring less energy. This one-year research project is part-funded by the Innovate UK Energy Catalyst fund, as well as a contribution from the British Glass Energy and Environment (E&E) Committee.

"If glass manufacturers could operate furnaces at a lower temperature – and make glass of the same quality – the UK glass industry could reduce its energy consumption by 5-10%. That could equate to a direct energy cost savings as well as reducing CO² emissions by around 200,000 tonnes a year."

Rob Ireson, Innovation Programme Leader, Glass Technology Services Ltd



DEFRA visit with British Glass and Guardian gives greater understanding of sector air quality work

In February, British Glass and its member Guardian Industries UK Ltd were pleased to host a visit for DEFRA's air quality team – showing them the Goole flat glass production line and explaining the glass industry's emissions-related achievements and challenges.

British Glass is forging strong links with this new team at the Department of Environment, Food and Rural Affairs (DEFRA), and ensuring the staff have a good grounding in the realities of glass manufacturing and emissions management ahead of the consultation later this year on ways to continue improving air quality.

"It's been very helpful to see the glass manufacturing process, understand where the emissions come from and discuss the technical issues the industry faces. Getting a greater understanding of the interaction between the flue gas abatement systems and waste heat recovery technologies was particularly useful."

Nicola Leeds, Head of Industrial Pollution Control for DEFRA

6

Filter dust disposal study

Disposing of the dust that is filtered from waste gases can be a significant cost in glass manufacturing, and reductions in permitted emissions exacerbate the situation. So this year British Glass commissioned a study into alternative markets for the filter dust that glass manufacturers cannot themselves recycle.

Evidence from this study is now being used in our work with local authorities to achieve practicable regulation that balances the need to control oxides of sulphur emissions and reduce hazardous waste.

In addition to the study British Glass is also producing guidance on assessing the hazardous properties of filter dust in line with waste classification requirements.



Health and Safety *Forward*

This year has seen the launch of our new Health and Safety *Forward* scheme – which actively shapes, measures and demonstrates industry improvement. It also ensures the glass sector work is aligned with Health and Safety Executive (HSE) strategy.

This includes our continued collection and reporting of health and safety data on behalf of the industry to make the official sector-level statistical return to the HSE.

As well as our committee meetings – which provide an invaluable forum for members to learn from one another – we've held two training events (see below).

In February we had the first meeting of a new occupational health working group, which will assess current health provision and challenges in the glass sector, and promote good practice.



REACH-ing a better understanding of chemical regulation

In July 2016 we welcomed delegates from around twenty member companies for a workshop examining the impact of the REACH regulations on glass.

The programme gave attendees the tools to better understand their sector and company obligations, the potential future impacts and the steps that they need to take to comply.

"I really enjoyed the day – it was great to work on exercises together with others from the industry – we could really bounce ideas off each other and learn from each other's experience and knowledge."

Jacqui Williams, Health and Safety Officer, PPG Industries (Now Electric Glass Fibre UK Ltd)



Expert training puts glass health and safety on a firm footing

Say health, safety and glass industry in the same sentence and most people's first thoughts are of high temperatures, machinery or broken glass. But the training session members attended at the Health and Safety Laboratory in Buxton was actually on slips, trips and falls.

That's because British Glass' own data from the industry has shown slips, trips and falls to be the second most common cause of both reportable and non-reportable injuries over the past five years.

"The training session was excellent – and very valuable given this is the biggest cause of workplace injuries in the UK. It's also a big help to know how the HSL can support us further on this – with things like context-specific testing of safety boots, flooring choice advice and on-site assessments."

Alistair Lowe, O-I Environment, Health and Safety Leader UK; British Glass Health and Safety Committee Chair

Relationships with government and industry

Now more than ever, British Glass is engaged at every level of government to support policy making with evidence-based insight and achieve coherent policy positions.

We've worked tirelessly to build relationships and maintain momentum throughout the recent change of Prime Minister and government restructure. As the UK's exit from the EU approaches, and the US sets its new agenda, British Glass continues its work to put our sector ahead of the game and its rivals. In the past year we've kept up regular dialogue with senior government officials and industry leaders including:

- Minister of State for Climate Change and Industry, Nick Hurd MP
- Secretary of State for Business, Energy and Industrial Strategy, Rt Hon Greg Clark MP
- Parliamentary Under Secretary of State at the Department for Business, Energy and Industrial Strategy Lord, Prior
- CBI Director General, Carolyn Fairburn.
- All-Party Parliamentary Packaging Group
- All-Party Parliamentary Manufacturing Group
- British Standards Institute, CEN (European Committee for Standardization) and CETIE (International Technical Centre for Bottling and related Packaging)
- DEFRA's Advisory Committee on Packaging
- DEFRA's Part A Forum and Industrial Pollution Control Local Authority Group
- Energy Intensive Users Group
- Emissions Trading Group
- FEVE (European Container Glass Federation), Glass for Europe and Glass Alliance Europe (including groups on Respirable Crystalline Silica, Refractory Ceramic Fibre, REACH and Chemicals at Work)
- Glass and Glazing Supply Chain Group.

Strong alliances with comparable sectors are helping us to identify significant changes and to channel information to the people who need it, as we continue to participate in a wide range of groups including:

Data and information services

With the UK's only dedicated library on glass technology, and access to direct data from industry, British Glass continues to build a valuable evidence base. This underpins our policy work – and is a direct resource to members.

We carry out hundreds of bespoke information searches every year – covering glass technology, market data, global production locations, product standards, patents and more. Members can email information@britglass.co.uk to request free information searches and loan copies of library materials.

Our quarterly Digest continues to provide a snapshot of the latest library material added to our catalogue while our Industry Pulse e-bulletin has helped share members' news stories, as well as highlighting some of the most interesting developments in glass.

To hear our news first, sign up to receive our Industry Pulse bulletin – just visit www.britglass.co.uk/sign-up