

The EU natural mineral & spring water industry strives for circularity: the role of well-designed Deposit Refund Systems

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Plastics conference 2022



Natural Mineral Waters Europe
Natural Mineral & Spring Waters

NMWE and the sector in a nutshell

About NMWE

- ❖ In Brussels since 2003 (successor to UNESEM, Paris, 1953)
- ❖ Representing natural mineral and spring waters
- ❖ Membership base of national trade associations and companies (>550 bottlers)

National Federations			
	Austria		Luxembourg
	Belgium		Netherlands
	Bulgaria		Poland
	Croatia		Portugal
	Czech Republic		Romania
	Denmark		Serbia
	France		Slovenia
	Georgia		South Africa
	Germany		Spain
	Greece		Turkey
	Hungary		UK (BSDA)
	Ireland		Ukraine
	Italy		

Companies
Danone Waters, Gerolsteiner, Mattoni 1873, Nestlé Waters, Romaqua Group, San Benedetto, Spadel

What do European consumers drink?

Natural
mineral water
83%



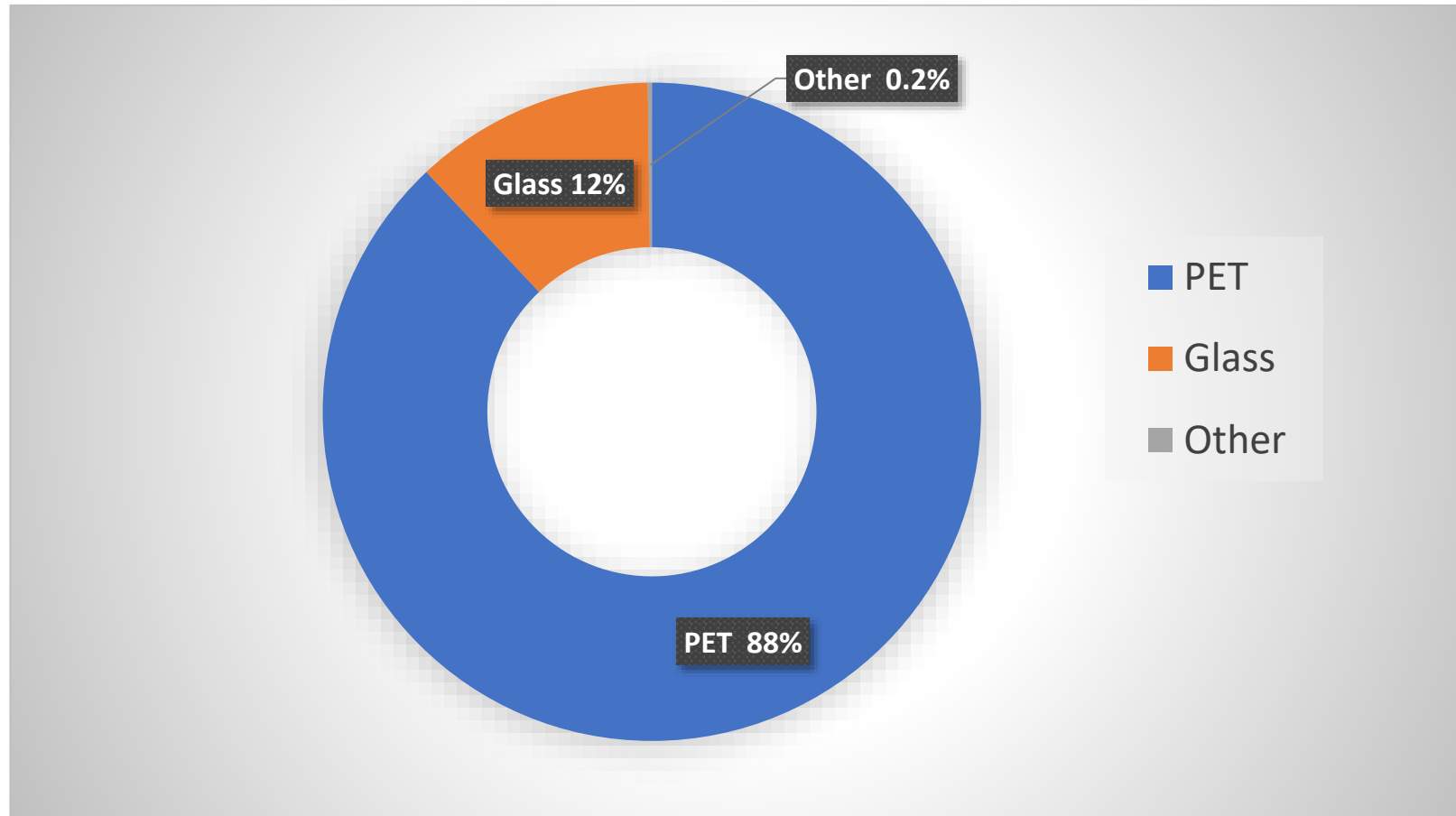
Spring water
14%



Bottled
drinking water
3%



Where do they drink it?



Source: GlobalData



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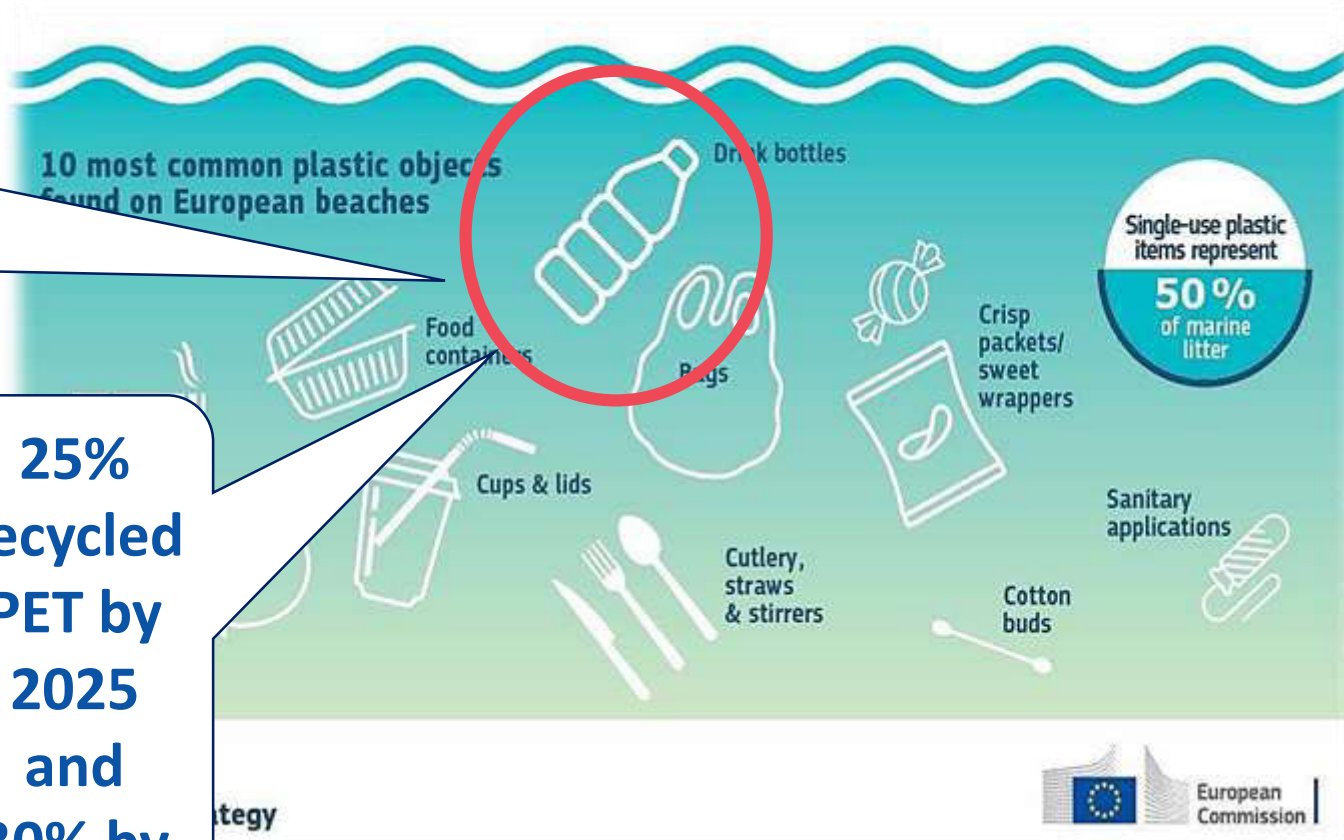
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EU legal framework


The only sector obliged to use rPET

**77%
collection
target by
2025 and
90% by
2029**

**25%
recycled
PET by
2025
and
30% by
2030**



But we receive conflicting messages



Recycling should only be used as a last resort



National measures going beyond EU SUP targets

- France: total ban on single use plastics by 2040
- Spain: draft going in the same direction

Upcoming revision of the EU Packaging legislation

- EU objective to privilege reduction and reuse



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NMWE actions

Brands very active on r-PET

Nestle W
100% rPl
Valvert (



Leg
recy

Activis
solutio



MEN WOMEN KIDS SALE HOLIDAY 3 STRIPE

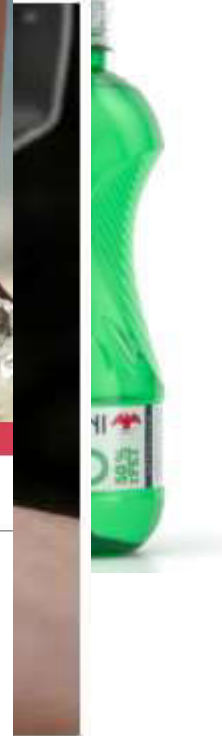


ADIDAS / MARCH 2021 / ADIDAS

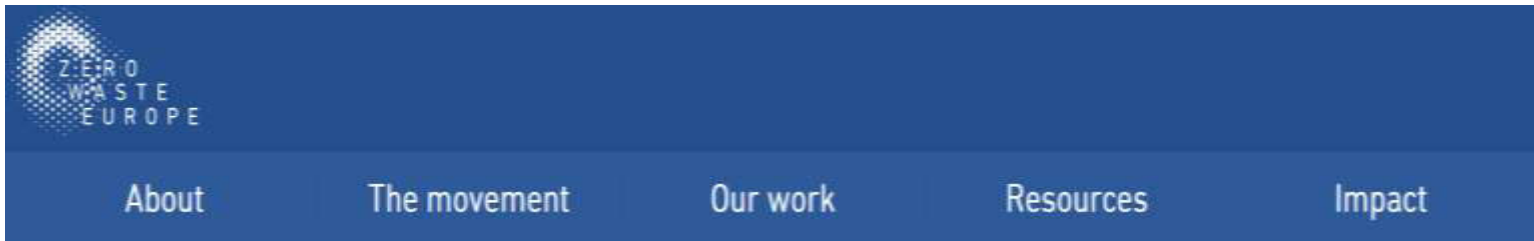


HOW WE TURN PLASTIC BOTTLES INTO SHOES: OUR PARTNERSHIP WITH PARLEY FOR THE OCEANS

ri:
PET



Joint effort with Zero Waste Europe



It's time to acknowledge the role of Deposit Refund Systems (DRS) in achieving a Circular Economy for beverage packaging in the EU

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06 OCT 2021

share:    



Well-designed DRS will help the beverage industry achieve the collection targets set out by the SUP directive:

77% by 2025
90% by 2029

The infographic features a green and blue wavy background. On the right, there is a green recycling symbol with a white globe in the center. At the bottom, there are logos for Natural Mineral Waters Europe, Unesda, and Zero Waste Europe.

Design elements of a successful DRS

Consumer

- ❖ The level of deposit fee to incentivize a “bring back” culture
- ❖ Convenient return points
- ❖ Communications
 - Deposit fee as a separate from the sales price for clarity
 - Materials covered

Governance

- ❖ Set up & run by obliged industry
- ❖ Centrally operated (Central Deposit Management Organization)
- ❖ Not-for-profit



Scope

- ❖ Operated at national level
- ❖ Include all relevant beverage categories & packaging types

Finances

- ❖ Unredeemed deposits & sales of collected materials to stay in CDMO

DRS development in Europe



Country	Implementation Year
Austria	2025
England/Wales/ Northern Ireland	2024
Greece	2023
Hungary	2023
Ireland	2023
Latvia	Feb 2022
Malta	2022
Netherlands	2022 Expansion
Poland	2023
Portugal	2024
Romania	2022/2023
Scotland	2022
Slovakia	2022
Turkey	2023

Concluding remarks

- The sector needs reliable long-term political framework conditions
- Circularity works and recycling is part of the solution
- DRS is crucial for collecting beverage containers and giving recyclers clean material
- The beverage industry, in Europe, is the only legally obliged sector with minimum recycled plastic content in 2025/2030
 - Beverage producers need a fair access so that they can fulfil the requirements

Thank you!



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