



British Glass

**End of Year Review
2021 — 2022**

Welcome from Dave



Dave Dalton, British Glass CEO

It's been another very different year for our industry as we've faced challenges that we expected, in the shape of the lasting effect of Covid-19 and Brexit, and ones that we could not have predicted.

While it has been a difficult year for the glass sector, we have had much to celebrate over the last 12 months across the industry, from the beginning of the UN International Year of Glass to positive news on the deposit return scheme and beyond.

The International Year of Glass marks the vital role glass has played and continues to play in our society, acknowledging its many applications and the vastly different sectors that make up the global glass industry. Celebrations officially began with February's opening ceremony taking place at the UN Palace of Nations in Geneva. It was a delight to see such vast representation of our magnificent industry at such a prestigious event and I look forward to continuing to shine a line on the very best we have to offer.

We have forged strong working relationships with the Glass & Glazing Federation and allied with them to press government to reflect the significant role glazing systems should play in the green economy. We have also worked closely with fellow industries in the Energy Intensive Users Group (EUIG) during the ongoing energy crisis to help BEIS and wider government departments understand the impacts and potential consequences of the rising energy costs. As a result, we have seen a strengthening of our relationships with key contacts in government.

Despite the challenges we have already faced and those that will continue as we enter our new membership year, there has been cause for celebration and much for us to be proud of. As part of our ongoing representation of the sector in Westminster we have welcomed a number of MPs to our members' facilities to discuss the pressing issues of our industry including Business and Industry Minister Lee Rowley MP, Shadow Secretary of State for Net Zero and Climate Ed Miliband MP, and Shadow Secretary of State for Business and Industrial Strategy Jonathan Reynolds MP.

We were also able to highlight the best of the UK industry and supply chain at our Glass Focus Awards in Manchester as the event returned to the in-person celebration that we have become accustomed to in previous years. It was great to be able to return to a sense of normality and celebrate the achievements of members and companies across the supply chain and I'm sure a good night was had by all.

Finally, a very late win for our recent years of toil is the decision from DEFRA to keep glass containers out of the new deposit return scheme (DRS). It's a fantastic result for the team and one that members, the wider glass industry and ultimately the environment will definitely benefit from. While there is still work to do to ensure that the government keep their word, it is certainly a step in the right direction as we look towards a more sustainable future for glass.

Meet the team



Dr Nick Kirk
Technical Director



Jenni Richards
Federation Manager



Paul Pearcy
Senior EHS Adviser



Mark Pudner
Senior Technical Adviser



Theresa Green
Information Officer



Phillip Fenton
Lead Packaging and
Recycling Adviser



Holly Feeny
EHS Adviser



Joe Cadman
Communications Officer



Meg Grattidge
Events and Training
Coordinator



Victoria Adams
Communications
Manager



Tom Armes
Content Marketing Lead



Gareth Jones
Operations and
Commercial Director



Callum Hawksworth
Administrative Assistant



Alistair Craig
Policy Officer

Energy crisis

Towards the end of 2021 we saw unprecedented wholesale energy prices due to increased global demand as economies recovered from the pandemic, there was lower wind generation and lower supply of Russian gas. While this is a global problem, we continue to see a cost premium in the UK versus many of our international competitors.

More recently we have seen further volatility in the energy market due to the appalling conflict in Ukraine which has compounded the issue even further.

Glass manufacturers have seen their gas and energy prices quadruple and triple respectively over the last year – costing the industry an estimated £42m extra per month than 12 months ago (based on wholesale price). UK ETS prices have also more than doubled in last 12 months.

We have been heavily involved in discussions with government departments and the secretary of state raising the impact of these costs on the UK glass industry and supply chains as well as highlighting the risks to media through articles and TV interviews.

British Glass and members have engaged ministers and MPs to discuss the impact of the energy crisis, to hold government to account and to suggest solutions. As part of the Energy Intensive User Group, we have worked with other foundation industries to ensure a coherent approach. We continue to push for the UK government to help to ensure UK glass manufacturing is internationally competitive through energy wholesale, policy and carbon costs.

Government has yet to provide any help towards the energy and carbon crisis, which is disappointing, particularly in light of the EU implementing temporary changes to state aid guidelines, helping energy intensive industries in the EU mitigate rises to energy costs. We continue to push for more action from the UK government to help EIs through this crisis to ensure our members remain competitive.



Ed Milliband at Ardagh Doncaster



Dave Dalton with Lee Rowley MP and Adrian Curry, Encirc Glass

Environment & energy

In addition to the unprecedented challenge posed by the energy crisis, publishing the net zero strategy and guiding member companies through the first year of the UK Emissions Trading Scheme (UK ETS), the team continues to steer the development of a wide range of policy and guidance.

The UK government has been busy looking at changes to energy and carbon policy in response to the net zero commitment made by the UK government and is still reviewing some legislative aspects now that the UK are no longer part of the EU.

British Glass have repeatedly called for the continuation and expansion of reliefs that reduce the costs of additional 'green levies' passed through to electricity bills in order to maintain international competitiveness of UK manufacturing. We are pleased to say that the UK Government has confirmed the continuation of the exemption for renewables and will consult on increasing the rate. British Glass inputted into the review of eligibility for the carbon costs compensation scheme and showed that all glass subsectors met the eligibility criteria put forward. The Government response confirmed that the scheme would be extended for three years, however, due to a significant change in the criteria only three sectors were added, one of which was the glass fibre subsector. Government has indicated further options to reduce electricity prices for UK industry and we will continue to rigorously make the case for the full glass sector to be included within existing and future measures.

The government's industrial decarbonisation strategy (March 2021) announced the development of an environmental product labelling scheme which is still in early days of its design – British Glass responded to a call for evidence in February 2022 and have discussed concerns with BEIS.

Since leaving the EU, the UK government has introduced a UK ETS and continues to reform the scheme, both in terms of overall cap and the free allowance system. It is vital the glass sector retains free allowances

and parity with overseas glass manufacturers to remain competitive. We have been successful in getting adjustments for covid-related production changes removed from the baseline. The EU continues to develop the EU ETS (eg introducing carbon border adjustments) and it is important that we follow these changes to ensure that UK producers are not at a disadvantage to EU competitors.

British glass has advised against the move to a volumetric charge for the green gas levy as this would add further UK costs to an already debilitating global gas price rise. We have alerted government to the impact on the glass sector and we await the government response. Another upcoming consultation we are aware of will consider moving policy costs from electricity onto gas.

Consultation is underway to develop the UK climate change agreements after targets end this year. We will push for realistic energy efficiency targets and minimum administrative burden.

We had an excellent response to the net zero strategy with heavy traffic to the webpage and discussions across departments at Whitehall. We now await the UK Government's biomass strategy to further understand the extent to which biofuels can be part of the future energy mix for the sector.

As always, we continue to support members with site compliance across the environmental spectrum from pollution, carbon reporting, and energy efficiency through to energy reporting requirements. The British Glass team continued to track and support members on decarbonisation funding opportunities and several members submitted successful applications for funding through the Industrial Energy Transformation Fund (IETF).

Data is an essential tool to help develop impact assessments for new policies and we continue to collect this sector data from our larger manufacturing members and would like to thank everyone involved.

Health & safety overview

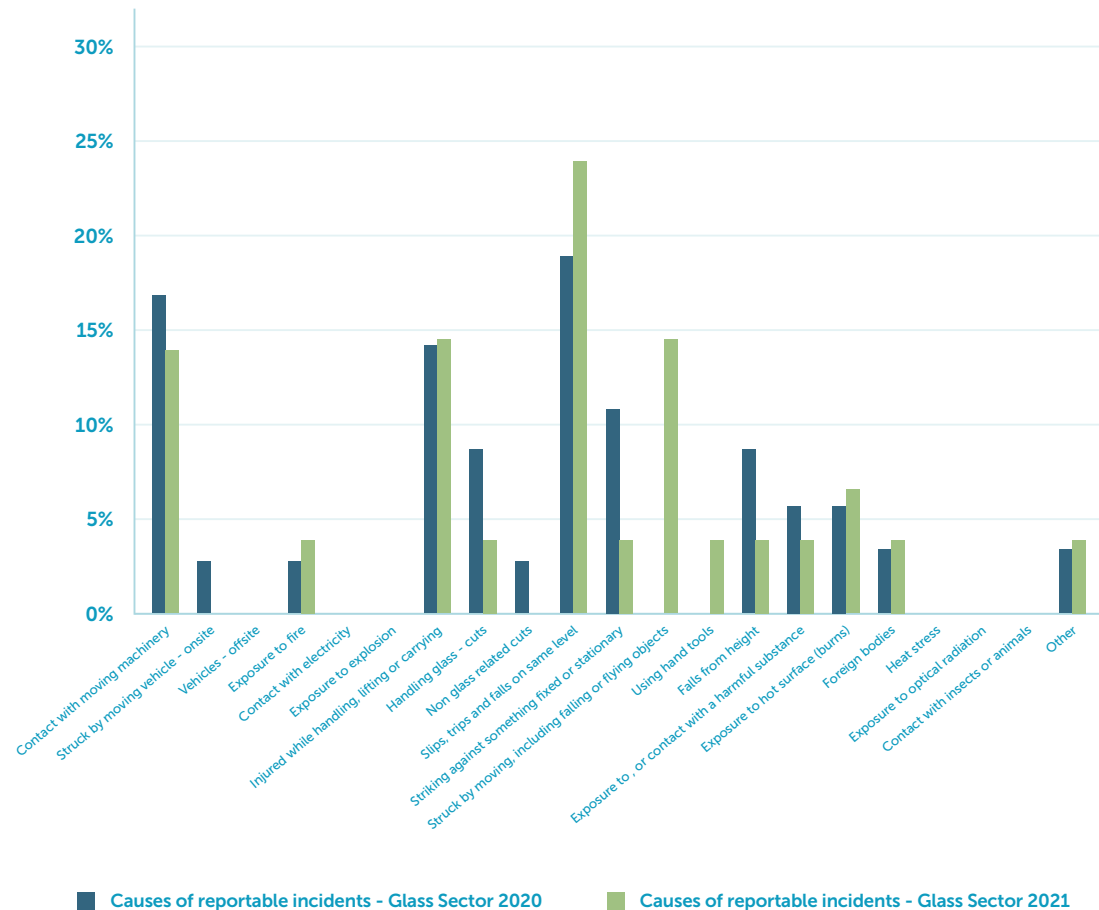
Health and safety is at the core of everything we do, and the *health and safety forward scheme* facilitates a common goal of health and safety improvement across the glass sector. Those participating in the scheme submit annual data, which is presented to the committee as sector statistics and a report 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, where we can feed back activities, address wider mineral industry issues, and raise sector concerns for discussion.

Over the past 12 months, Covid-19 has remained a priority for members although less support has been required than the previous year. British Glass have provided a forum for discussion on best practice and advising on queries as we transition into the new normal. We have also continued to support the implementation of new requirements for chemical regulation to transition from EU REACH to UK REACH. This will ensure continued supply of chemicals.

Slips, trips and falls continues as the top RIDDOR accident in both 2020 and 2021, followed by contact with moving machinery and injured while handling, lifting or carrying, both in the top RIDDOR accidents for 2020 and 2021. New to the 2021 accident statistics is struck by moving, including falling/flying objects.

Casues of reportable accidents 2020 and 2021



Glass Focus 2021

The winners of the 2021 Glass Focus awards were revealed at a glitzy black-tie event at Hotel Brooklyn in Manchester on 18 November.

After a challenging period, it was a pleasure to welcome back the glass industry and our supply chain to celebrate in-person once again.



For the second year in a row Encirc were crowned company of the year and also took home the *innovative solution* and *strengthening business through people* awards while Saint-Gobain Glass won three awards including *rising star*, *health and safety action* and *sustainable practice* alongside Morley Glass & Glazing.

Other winners on the night included Allied Glass, The Armstrong Partnership and The Glass Company.



Glass Focus
Awards 2021



British Glass

The full list of winners from the night are as follows:

Design of the year – container (sponsored by Rockfield)

Clean T by Allied Glass

Design of the year – flat (sponsored by Glass Worldwide)

Ubiquitous Energy by The Glass Company

Innovative solution (sponsored by Glass Technology Services)

The world's most sustainable glass bottle by Encirc

Health and safety action (sponsored by Arco)

Onsite defibrillators by Saint-Gobain Glass

Strengthening business through people (sponsored by Glass Futures)

Ignite programme by Encirc

Rising star (sponsored by the Worshipful Company of Glass Sellers)

Will Ruane at Saint-Gobain Glass

Marketing impact (sponsored by Friends of Glass)

Encirc: Big 5 by The Armstrong Partnership

Sustainable practice (sponsored by Glass International)

GreenVision Fund by Saint-Gobain Glass and Morley Glass & Glazing

British Glass company of the year

Encirc

Net zero and flat glass











Net zero


Following consultation with our large glass manufacturing members, we published the net zero strategy in July 2021. Since then, British Glass has been engaging with government departments to take forward policy recommendations that will support the UK glass sector's continued decarbonisation.

The strategy document was a snapshot of industry thinking in 2021 and since the energy and decarbonisation landscape is continuously evolving, so will the strategy and we will ensure this is reviewed after an appropriate period of time.

Trials at member companies have proved that low carbon glass production is possible, and British Glass will continue to push for government support to ensure that our members remain globally competitive during the transition.

British Glass has also supported the Glass Futures' fuel switching project and policy recommendations from the net zero strategy are supported within the fuel switching project report which came to a close in April 2022.

	Company	Type
	Ardagh	Container
	Allied	Container
	Beatson Clark	Container
	Encirc	Container
	O-I	Container
	Stoelzle	Container
	Guardian	Flat
	NSG	Flat
	Saint Gobain	Flat
	Nippon Electric Glass Fiber	Fiber



Flat glass

We have continued to deliver on our flat glass strategy over the last year. Our top priority – improving flat glass recycling – has seen us work with a range of stakeholders to explore potential new initiatives and technologies, including a trial in the Northwest to collect waste glass from glazing installers to send for remelt.

To reduce the amount of flat glass sent to landfill, we have called for glass to be charged the standard rate of landfill tax (£96/tonne) rather than the current lower rate (£3/tonne) in a recent consultation. This properly reflects the value of glass as an infinitely recyclable material and should incentivise glass recycling further.

Working with the Glass and Glazing Federation (GGF), we commissioned a report to assess the potential carbon savings from upgrading outdated and inefficient double glazing to new double and triple glazing that uses the best available technology. The report supports our argument to policy makers that glazing upgrades have a vital role to play in reducing carbon emissions from buildings and reaching net zero. We will continue advocating for a 'fabric-first' approach to building decarbonisation, as set out in the UK government's heat and buildings strategy.

Technical committee and Trade, brexit & Covid-19

Technical committee

This year saw the retirement of the committee's longest serving member and chairman, Alan Haigh. Alan originally represented Beatson Clark on the committee and following his retirement worked as a consultant for British Glass for 10 years, representing the UK glass sector at Cetie, CEN and BSI. Chris Todd, formerly of Allied Glass, has taken over as committee chair and consultant to British Glass.

One of the key issues covered by the committee this year was the change in the measuring container bottle regulations. The terms of the Brexit withdrawal agreement meant the reverse epsilon marking required by the regulations could no longer be used and was due to be replaced with the UKCA marking. This would have cost the sector millions in terms of changes to mould equipment and was not technically viable for most container designs.

British Glass initially worked with BEIS to ensure an extension to the transitional arrangements until the end of 2023. We have now reached agreement to apply the UKCA mark to the pallet label rather than the container and are working with BEIS to ensure that the legislation is changed. Dual marking is permitted so the reverse epsilon can continue to be applied to the container.



The revision of British Glass technical documents, TEC7 (strength and performance guidelines for the manufacture and use of carbonated beverage bottles) and TEC6 (accurate determination of glass container capacity) have now been signed off by the committee and will be published soon. The review of the technical document series will continue this year starting with TEC9 (general guidelines for the use of glass containers). The technical documents are available free of charge to British Glass members and can be requested via information services.

Members of the committee and British Glass also attended numerous working group meetings at Cetie, CEN, BSI and BRCGS and shared the outcomes within the group. Later this year British Glass will host the Cetie plenary meeting in Sheffield.

Trade, brexit and Covid-19

The fallout from Covid-19 and Brexit has continued to impact UK businesses over the last year. Disruption to supply chains, material shortages and rising inflation has made for an uncertain outlook.

We continued to monitor the wider economic picture, update members, and represent the sector to government – including on the HGV driver shortages and the so-called 'pingdemic'. Manufacturers kept sensible Covid-19 mitigations in place beyond legal requirements, to minimise cases and protect production.

The Trade Remedies Authority (TRA) continues its transition reviews into glass fibre anti-dumping and anti-subsidy measures against China. We continue to support the cases and hope the TRA will conclude that these vital protections should be upheld. We have also enhanced our trade data monitoring to ensure any import surges or other unusual trade flows in glass are detected rapidly and will follow up with the TRA if we feel that trade measures are required.

Friends of glass

The Friends of Glass platform has had another successful year with several campaigns encouraging the continued recycling of glass around the country and demonstrating the benefits of glass packaging to brands, consumers and everyone in-between.

Alongside Ardagh, Allied Glass and URM, Friends of Glass partnered with Zero Waste Leeds for a recycling campaign in Leeds that looked to capitalise on increased glass recycling at bottle banks across the city during lockdowns in 2020. The campaign targeted the whole city through social media communications and, with help from Leeds City Council, the next-door app.

We also identified three under performing glass bank sites in different areas across the city and replaced the old banks with new banks that were brightly designed with help from the surrounding local communities. As a result, the three glass sites saw a 16% increase in the amount of glass collected for recycling during the campaign and a 43% increase in the months after the campaign.

The start of 2022 saw us begin work on a 12-month sustained PR campaign with Grayling to regain a share of voice for glass in the environmental and sustainability debates in the media. The team at Grayling will be providing press office support throughout the year as well as working with us on two main campaigns with the first, a video titled This is glass, which launched

in March. The video shows that if glass was a new product today it would be the packaging choice for brands due to its benefits and sustainability credentials while accompanying research highlights consumer preferences towards glass. A second campaign will begin in summer 2022.

We have also continued our work alongside local authorities across the UK partnering with Newcastle City Council and Shropshire Council. We created bespoke local glass recycling campaigns promoting the benefits of recycling and addressing barriers each authority has faced when it comes to residents recycling their glass.

The Glass Guardians campaign entered its fourth year with updated resources including an online interactive experiment that takes users on the glass recycling journey, highlighting the importance of recycling and the effect of cullet in the manufacturing process. So far there has been 819 downloads of the resources and 1679 sessions of the interactive experiment with the campaign set to run for the remainder of the school year until July.

Finally in the next 12 months we will be working with brands on a number of projects including a maximising the sustainability of glass guide and a series of case studies showing best practice from brands covering topics such as design, refill and switching to glass packaging from an alternative packaging material.





Maximising member value

At British Glass, membership value is one of our top priorities as we aim to effectively represent the sector's interests through communication with government and other relevant stakeholders. The recent knowledge exchange event held by British Glass on the 2 February 2022, *Maximising the Value of your membership*, aimed to highlight the benefits of membership and help us to continually develop.

Continuous improvement of our information services is a top priority, and we are working towards digitising available publications to benefit the service's efficiency. The online library already acts as a digital tool allowing members to access the digital catalogue of article publications which can be requested up to 10 times per month.

We also aim to maintain constant communication with members throughout the year to provide the highest level of value possible. We communicate in various ways with members from formal subject specific committees to social media. Our regular news bulletins include health & safety news, headlines, latest updates and library updates. For any queries regarding communications or to be added to the mailing list contact the communications team - prcomms@britglass.co.uk

Over the last year British Glass has provided numerous events and training opportunities to help members develop. This includes member only events, the annual Glass Focus awards in November 2021, networking events, and glass specific training. For further information of British Glass events and training [visit the British Glass website](#).

Value at British Glass is also presented through the availability of technical expertise and guidance. Areas of expertise and guidance include energy efficiency and decarbonisation, recycling and waste, energy and energy taxation costs, health and safety forward scheme, emissions regulations, products standards and trade.

British Glass have taken a lead role in work on decarbonisation, working closely with regulators and other industry bodies to ensure that what is required of the glass industry is practical, proportionate, and based on sound evidence. We work hard with you to increase glass recycling rates and to deliver a truly circular economy.

Recycling committee

Container recycling – Upcoming regulatory changes

A significant overhaul of the UK's packaging recycling system is coming in 2024 onwards with a reformed scheme of extended producer responsibility, a deposit return scheme (DRS) for beverage bottles and consistency of collection in England. British Glass recognise the importance of ensuring these once-in-a-generation reforms work for glass. Meeting our recycling ambitions means increasing recycled content, reducing carbon emissions, and producing ever more sustainable packaging.

The entire glass sector alongside many brands and retailers have been united in their opposition to the inclusion of glass in the upcoming DRS, recognising that including glass in the scheme would be detrimental to glass recycling rates, increase carbon emissions, and incentivise material switching from glass to plastic packaging. In late March, we were absolutely delighted when government announced glass would be excluded from the England and Northern Ireland DRS.

Campaign review

During our campaign to keep glass at our kerbside, we held over 200 meetings with stakeholders on DRS and talked to over 30 elected politicians despite Covid restrictions and we organised and secured support from across the glass supply chain for an open letter to the government in March 2021.

Working closely with our recycling committee, we commissioned two reports to set out the evidence that an improved consistent kerbside recycling system is more effective for closed loop glass recycling compared to a DRS – one with Oakdene Hollins and another with Valpak. We also commissioned YouGov polling to show what consumers really think about a DRS.

We hosted a parliamentary dinner to engage a handful of MPs face-to-face on the issue in November 2021 and wrote numerous articles appearing in The



House magazine, Politics Home, Conservative Home and more. British Glass also attended both the Conservative and Labour party conferences in 2021 to engage with MPs and Ministers face-to-face including sponsoring a panel event at Conservative party conference where we were joined by the new recycling minister Jo Churchill in her first public appearance on recycling.

Following the positive news in March, British Glass remains committed to achieving the best possible outcome from the upcoming reforms. We support the UK government's ambitious glass recycling target of 83% by 2030 and remelt target of 80% and will work hard to ensure extended producer responsibility delivers for glass. We will also continue to call for consistent kerbside collection of glass across the entire UK.



Recycling Committee (cont.)

Closing the glass loop

It is almost two years since the European wide ambition to achieve a 90% collected for recycling rate was launched and there has been much activity across Europe since the launch with stakeholders from across the glass value chain coming together to work towards this target.

In the UK British Glass are the platform lead for the project, and we recently held our second annual UK glass recycling summit. With 2022 marking the international year of glass, we used the opportunity to consider our ambitions as an industry as we head towards 2050. Key themes discussed were decarbonisation and the circular economy.

During the virtual conference, we heard from the Minister responsible for recycling, Jo Churchill, Professor Alicia Durán from the International Commission on Glass, Yashica Kasiram who is Sustainability Lead at Heineken and others including representatives from Ardagh and O-I Glass.

Following last year's summit, we saw the formation of the UK glass alliance, a group of interested stakeholders looking at how we can advance the environmental benefits of glass with projects in the pipeline exploring consumer perceptions of higher recycled content and reusable glass, and a study to map out glass flows across the economy. This example of collaboration is crucial to achieve our 2030 and longer-term ambitions.



HR forum and Information services

HR forum

This year the HR forum and Future Forum have focused on two projects: a campaign to attract young people to careers in the glass industry, and an industry diversity report.

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. A new page on the British Glass website highlights opportunities available such as apprenticeships and signposts to members recruitment sites.

The diversity report, a first for the glass industry, 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.

Information services

At the core of British Glass lies the only dedicated library on glass and glass technology in the UK. Each year our information services answer hundreds of enquiries from companies and individuals wanting specific glass products, services or materials. We find out exactly what is required and refer them to the most appropriate member to suit their needs. Noticeably this year, requests for more bespoke glass bottles with

customised decoration has increased with customers all over the world learning more about the benefits of using glass.

All stages of development of this amazing material over the last 100 years can be found in the British Glass archive and library, and members are warmly invited to use its resources at any time. If you cannot visit, just drop an email to information services and we will be delighted to help or point you in the right direction.

Over the last year the team has answered around 250 direct requests from members and around 700+ from individuals or companies looking for suppliers. Our new online library hub, which highlights over 35,000 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 – we are happy to assist should you have any enquiry regarding sourcing a standard or interpretation.

To use the online library, please visit:

<https://www.britglass.org.uk/knowledge-base/digital-library-and-information-services>

* subject to fair usage rules



Glass Focus
Awards 2022

Join us this November as we celebrate
the international year of glass



British Glass



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