

# Germany's Refillable Bottle Systems

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Genossenschaft  
Deutscher Brunnen eG

# GDB: facts and figures



- ▶ Trading and service company of German mineral water bottlers,
- ▶ Cooperative (non-profit business)
- ▶ Headquarters: Bonn, Germany
- ▶ Founded: 1937
- ▶ Members/Customers: 162  
(nearly all German mineral water bottlers)
- ▶ turn over 2019/20: about 160 m. €
- ▶ Staff (group): 50

# Refillable Working Group: facts and figures



- ▶ Managing the Refillable Logo and working as a think tank & information point about refillables serving companies, start-ups, authorities and science
- ▶ Joint Organization of 8 Associations of Beverage Industry, Retail and environmental NGOs
- ▶ > 200 Companies with more than 600 brands
- ▶ Founded 2005

# Characteristics of the German Beverage Market

- ▶ Many Regional/Local producers: 1,350 breweries, 180 mineral water bottlers, 400+ soft drink & fruit juice producers
- ▶ Beverages are sold in crates
- ▶ A rich, diverse and specialized retail structure for beverages: 3,500 gross retailers, 12,000+ specialized beverage retailers

# Taxonomy of (German) Beverage Containers

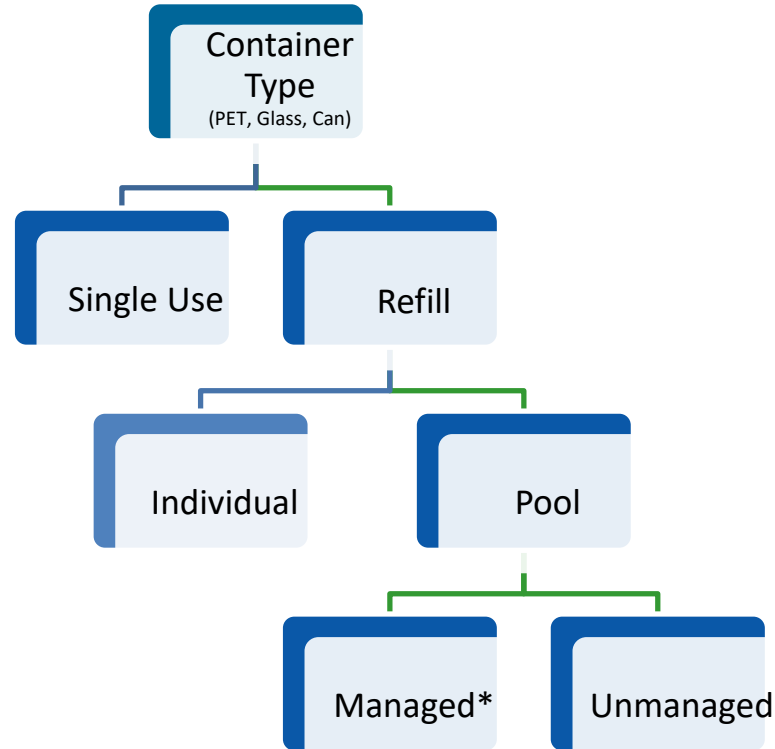
## Typical Questions Associated

- Type of beverage?
  - Branding?

- Customers and Consumer preferences
- Strategy (Corporate, Brand)

- Economic and environmental efficiency
  - Costs
  - Independence

- Quality
- Fair Share of burdens



## Typical Issues Associated

- Beer in PET is a „no-no“ in Germany

- Most discounters won't list reuse
- Glass associated with high-quality (Branding!)

- Pool bottles = co-operation with competitors
- Individual bottles higher costs

- Unfair practices in unmanaged pools
  - Quality issues

# GDB Reuse Systems



GDBs reuse bottle system is a  
Managed Pool System

It is referred as **the** pool system for beverage containers in Germany

# GDB Glass- and PET-Reuse-Pools & PET Circular System



## Market Share:

Beverage Reuse Container Mineral Water Market

> 35 %

## GDB Share Reuse:

GDB Glass- & PET-Reuse in Mineral Water Market

> 70 %

## Filled Bottles:

All GDB Systems

~ 6,8 billion

## Number of Reuse Bottles:

Glass- und PET-Reuse of GDB

> 1 billion

## Deposit Value:

Glas- und PET-Mehrwegpools der GDB

> 300 million €

>140  
bottlers

> 400  
brands





## Purpose of Pool Management

- ▶ legal framework for all bottlers
- ▶ balanced input and ejects
- ▶ responsibility of all bottlers
- ▶ fair sharing of benefits and duties
- ▶ clearing activities
- ▶ market analyses
- ▶ resulting in:
  - system immanent advantages of the pool packages

# Traditional GDB Refillable Pool Container

## Glass



12 x 0,7 l



12 x 0,75 l



12 x 0,5 l



12 x 0,7 l



8 x 0,7 l



12 x 0,7 l / 0,75 l

## PET



12 x 1,0 l  
Mineral water



12 x 1,0 l  
Soft drinks



12 x 0,75 l  
Soft drinks



12 x 0,5 l  
Mineral water /  
Soft drinks



6 x 1,5 l  
Mineral water  
without gas

# New GDB Refillable Glass & PET Container



**German Award 2018**  
for innovative  
reusable packaging



# Beer & CSD Reuse Bottles



In the German beer market and parts of the CSD market  
dominance of

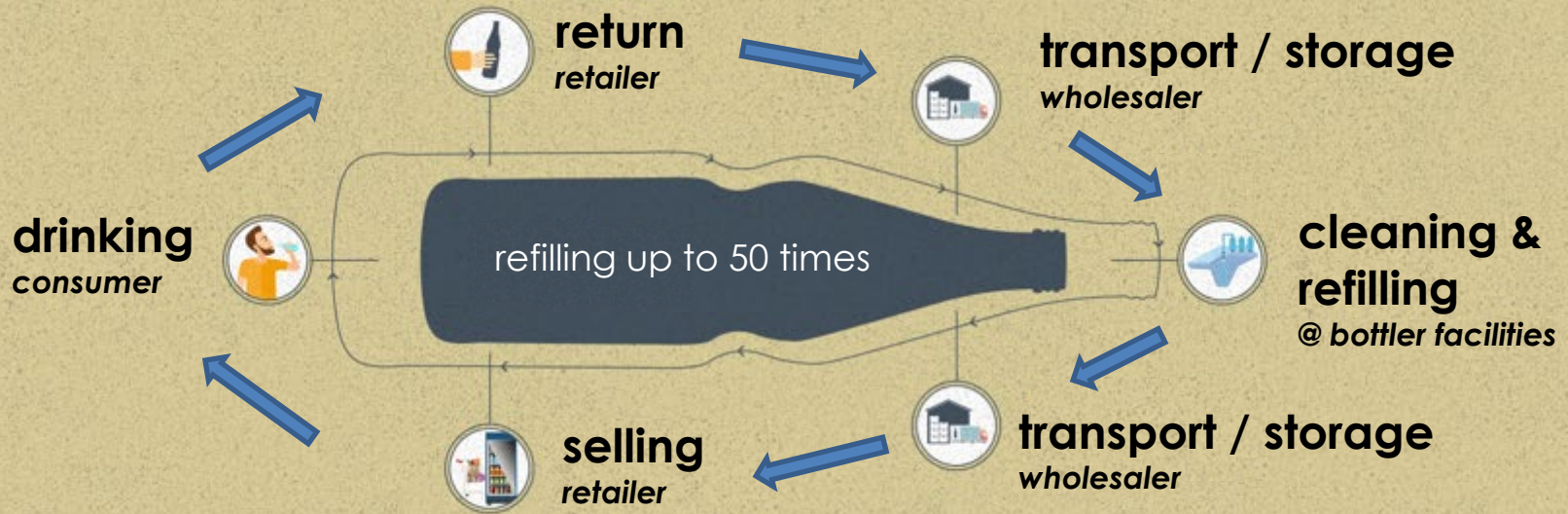
**unmanaged** reuse bottles & crates

# Beer & CSD Reuse Bottles



- ▶ Bottles used by brewers, CSD-producers, fruit-juice-makers etc.
- ▶ Estimates range between 1.5 - 2 billion bottles, 150-200 million crates in the market
- ▶ Growing issues with lost bottles, poor quality and unfair share of burden
- ▶ 2020: New initiative to set up a management system for this part of the market

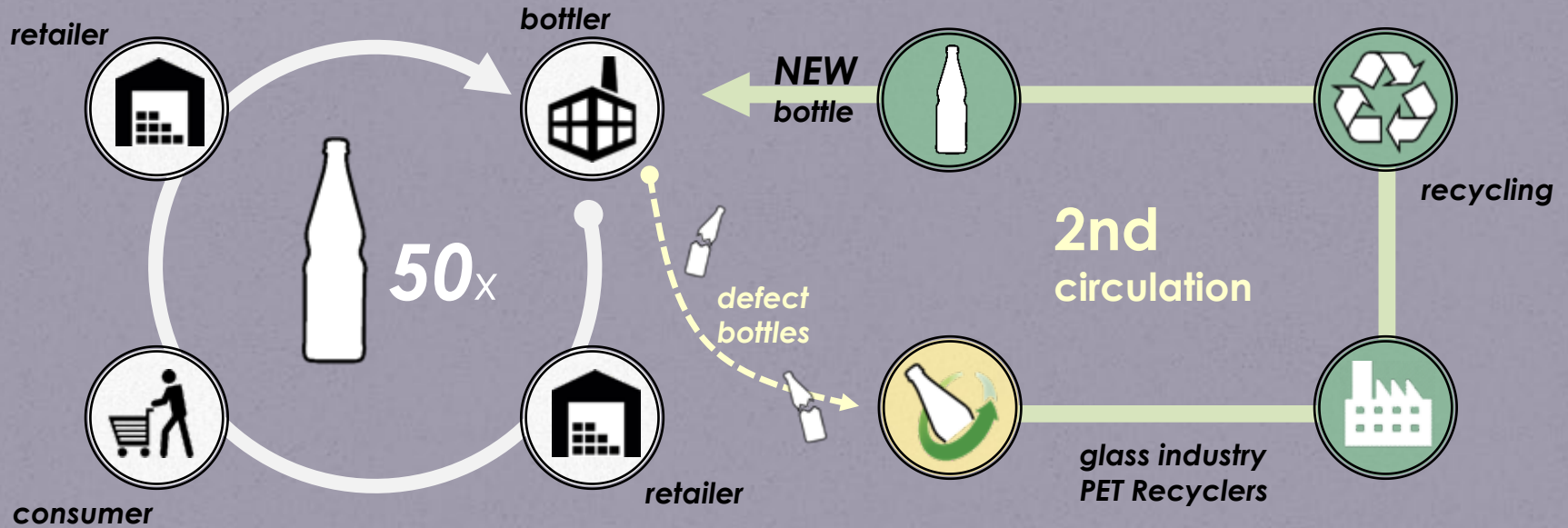
# The German Refillable System: A decentralized structure – the “Invisible Hand” at work



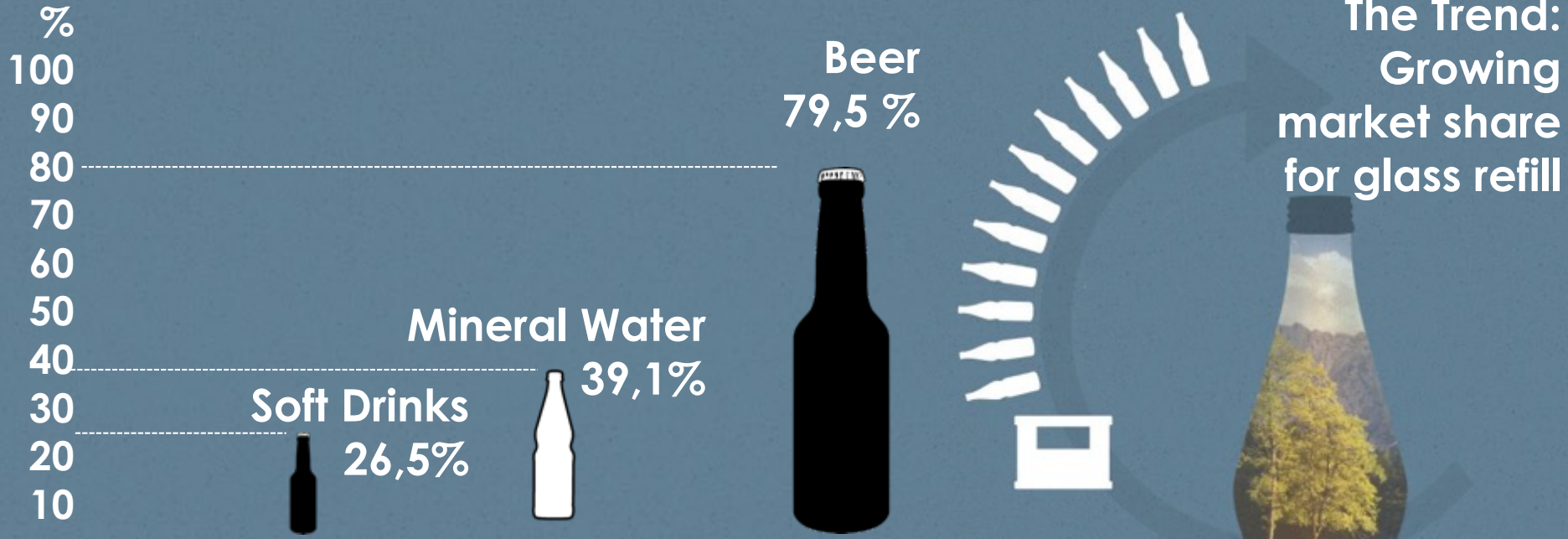
Graphic based on: <https://www.volle-pulle-umweltschutz.de>

A combination of self interest, experience, and established traditional structures

# The Double Circuit of Refillables



# Market Share Refillables (Official Federal data of 2018)





# Deposits

	Deposit	Remarks
Single Use (Mandatory)	€ 0,25	Based on German Packaging Law
Reuse	€ 0,08 – 0,15  Sometimes € 0,25 and more...	No legal requirements „Commercial Custom“
Crates	Usually € 1,50 Other deposits in the market	No legal requirements „Commercial Custom“

# Current Tasks & Challenges

- ▶ Stop loss of market share in PET-Reuse
- ▶ Raise rPET share (especially with clear PET-reuse bottles)
- ▶ Become Carbon Neutral
- ▶ Starting new Pool-Reuse Systems for Food



Thank you!