



Sustainability Roadmap Report 2014



Foreword



I am delighted to provide the foreword to the Soft Drinks Sustainability Roadmap's 2014 Report, which sets out the sector's environmental achievements and ambitions.

The soft drinks sector is an important part of the British economy, generating £7.7 billion a year and employing over 20,000 people. This initiative will ensure that the sector builds on this success by creating a thriving and sustainable industry that uses resources efficiently. This is good for the environment as well as being good for business.

The soft drinks industry was a key partner in establishing the Roadmap before taking ownership one year ago. I am pleased to see that they have set challenging objectives for themselves over five key areas affecting the sector – waste, water, packaging, carbon reduction and sustainable use of raw materials.

It is encouraging to see that sustainability, health and wellbeing, and growth remain high on the agenda of the industry, and I look forward to continuing to work in partnership with the sector.

Parliamentary Under Secretary of State for farming, food and marine environment

Overview of the Roadmap

The BSDA is delighted to be working alongside WRAP, the Government and industry on the Soft Drinks Sustainability Roadmap, which is enhancing the sustainability of the sector and helping secure its future prosperity.

The Roadmap is a voluntary initiative to promote best practice in the sector. It brings together the whole supply chain to achieve a common understanding of environmental sustainability opportunities.

The Roadmap is focused on five key areas:

Water efficiency:

To encourage water efficiency throughout the supply chain and contribute to the Federation House Commitment water reduction target of 20% by 2020 compared to 2007 levels.

Packaging and litter:

To promote the role of packaging in sustainability, contribute to Courtauld Commitment 3 targets, and to proactively address littering.

Raw materials:

To provide a better understanding of the potential to reduce the environmental impact of our use of raw materials.

Carbon reduction:

To increase efficiency and promote best practice in carbon management as well as a better understanding of the potential to reduce emissions.

Reducing waste:

To provide a platform to promote best practice for reducing waste and work towards zero waste to landfill.

Water efficiency

Water is an essential part of soft drinks manufacturing. It is used throughout the production process and supply chain. The Sustainability Roadmap aims to encourage efficient and responsible use of this resource.

We want to:

- Promote water efficiency initiatives and the activities already in place, share best practice, and encourage more businesses to adopt water efficiency measures.
- Reduce waste water by 20% by 2020 compared to 2007, in line with the Federation House Commitment target.

Highlights:

- In 2013, soft drinks manufacturers used an average of 1.99 litres of water per litre of product, down from 2.07 in 2010.
- Between 2012 and 2013, Roadmap signatories participating in WRAP's Federation House Commitment have contributed to a 1.35 million m³ reduction in annual water use.
- A Water Efficiency Webinar detailing WRAP's free water efficiency package – the 'Rippleffect' – and best practice examples from Coca-Cola Enterprises, to provide resources for the industry.



Case study:

Coca-Cola and the World Wildlife Fund

Coca-Cola Enterprises

Coca-Cola Great Britain and Coca-Cola Enterprises' three-year partnership with the World Wildlife Fund (WWF) aims to improve the quality and quantity of water in the River Cray, Sidcup, which is close to one of their plants; and in the River Nar, Norfolk, where sugar beet used in Coca-Cola Enterprises' drinks is grown.

Coca-Cola is working to restore river habitats by returning the rivers to their natural, meandering state, helping the river and surrounding meadows to work harmoniously in times of flooding and to attract more wildlife.

The projects have focused on promoting sustainable water management and agricultural practices, reducing agricultural pollution and build-up of river sediment, and working with local farmers to adopt more sustainable farming methods.

Specific targets for water replenishment have been established and by May 2014 the partnership had replenished 159 million litres of water through these projects.



Courtesy of Greg Armfield WWF-UK
Coca-Cola and WWF visit their project at the River Nar

Courtesy of Hugh Mehta WWF-UK
Coca-Cola staff doing river restoration work on the River Cray near their factory in Sidcup

Packaging and litter

Packaging plays an essential role in protecting, delivering and preserving soft drinks, as well as in minimising product wastage. The industry has continuously sought to reduce the amount of packaging used and we have made significant achievements in this area.

Recycling and collection rates for all materials need to increase, so it is vital that we raise consumer awareness of the benefits of recycling. In turn, we recognise that there needs to be a greater focus on the recyclability of packaging. Whilst the majority of soft drinks packaging is now recyclable, this is an area where improvements can still be made.

Litter is also an important issue for the industry. Collaboration is key - all manufacturers whose items are littered, anti-litter campaigners, land managers and government must work together to try to find a solution.

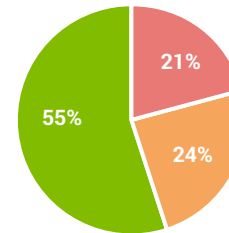
We are:

- Proactively addressing littering and looking at opportunities for collaboration with other organisations to prevent and reduce it.
- Committed to benchmarking PET bottle recyclability each year to ensure that the whole sector is helping to increase quality and quantity of recycled PET.
- Exploring ways to increase recycling and collection rates to improve resource security and efficient use of resources.
- Contributing to the Courtauld Commitment 3 target of improving packaging design to maximise recycled content where possible, improve recyclability and deliver product protection, while ensuring there is no increase in the carbon impact of packaging by 2015, from a 2012 baseline.

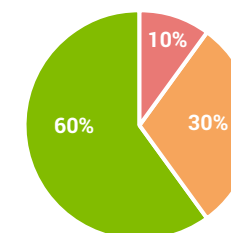
Highlights:

PET Bottle Recyclability: Plastic bottles are now more recyclable than in 2008

2008:



2013:



- A - easily recyclable
- B - moderately easy to recycle
- C - least easy to recycle

Source: WRAP

Case studies:

Britvic



A key part of Britvic's sustainability strategy over the past five years has been reducing the weight of its packaging to reduce waste and carbon emissions. Their focus on reducing pack and bottle sizes has resulted in significant environmental benefits.

This year saw the launch of Robinsons Squash'd, Britvic's on-the-go portable squash. This innovative packaging format has resulted in a significant reduction in the weight of packaging per serving compared to a 1 litre Robinsons Squash bottle, and a saving of 4.7g of carbon dioxide per serving (not including transportation savings). Over a year, that would result in a saving of 376g of carbon dioxide (based on someone consuming 80 servings per year).



In support of WRAP's Love Food, Hate Waste campaign, Britvic has also produced smaller pack sizes, such as the Pepsi 250ml can and the J20 fridge pack. These provide a wider choice in portion sizes, reducing wastage in consumers' homes.

Case study:

A.G. Barr



A.G. Barr is a funding partner alongside Alupro and Zero Waste Scotland of Every Can Counts (ECC) in Scotland; launched in 2012 by Scottish Environment Secretary, Richard Lochhead.

ECC - an 'on the go' recycling scheme for drinks cans - aims to raise awareness of the benefits of recycling, promote behaviour change, create awareness of the value of cans and provide a method to collect and recycle them. It is helping to drive up recycling rates within the workplace and helping businesses comply with new Scottish Regulations which require all businesses to separate paper and card, plastic, metal and glass for recycling.

A.G. Barr's flagship manufacturing site at Cumbernauld actively encourages employees to recycle through the ECC scheme and has seen a significant increase in recycling rates across all material types since signing up.

Over 700 sites in Scotland have now benefited from the scheme, and the programme is now expanding to include high-impact sites such as shopping centres, schools, universities and bus stations.

To find out more about ECC in Scotland please visit:

www.everycancounts.co.uk/scotland



Raw materials

As climate change and a rising population put pressure on our limited natural resources, it is becoming increasingly important for our raw materials to be sourced sustainably and used efficiently.

Whilst the Roadmap is a UK initiative, the soft drinks supply chain is international, and there are a number of initiatives in place across Europe which help companies embed sustainability into their supply chains. These include:

- Forest Stewardship Council (FSC): An international NGO dedicated to promoting responsible forest management. In the UK, the carton industry is committed to FSC.
- Sustainable Agriculture Initiative (SAI): The main food and drink industry initiative supporting the development of sustainable agriculture worldwide.
- Juice CSR Platform: A business-driven sustainability initiative to integrate corporate social responsibility into juice business operations and core strategy.
- Bonsucro (Better Sugar Cane Initiative): The first independent certification programme for the sugar cane industry.

As part of WRAP's Product Sustainability Forum, a number of Roadmap signatories are exploring pathfinder projects with WRAP to map the whole supply chain, focusing on raw materials used in the soft drinks sector.



Carbon reduction

Reducing the industry's carbon footprint as the industry grows is a key area of focus for Roadmap signatories. To meet this challenge, companies are increasing efficiencies on site, reducing transport emissions, improving the energy efficiency of vending machines and coolers, and exploring the use of renewable energy.

For example, recent Defra research for the Roadmap looked at refrigeration use in the UK soft drinks supply chain and identified potential reduction opportunities; such as, avoiding use of coolers without doors could result in savings of 50% to 75%.

We aim to:

- Promote best practice in carbon management and a better understanding of the potential to reduce emissions within the soft drinks industry.
- Reduce the environmental impact of soft drink vending machines and coolers.
- Continue to reduce the impact of transporting our goods and encourage hauliers to join the Freight Transport Association's Logistics Carbon Reduction Scheme (LCRS) and other similar schemes.

Highlights:

- 60% of hauliers used by Roadmap signatories signed up to the LCRS scheme, which has a commitment to reduce carbon emissions from freight transport by 8% by 2015 against a 2010 baseline.
- There is continuing innovation in refrigeration design. The energy efficiency of the best equipment has risen significantly over the last 5-10 years. A typical vending machine cooler is now 45% more efficient than in 2007.



Case studies:

Copella



Reducing carbon is a priority for Copella, the leading apple juice brand in the UK. They have installed 150 kilowatts of solar panels at their site in Boxford, Suffolk and they hope to become fossil fuel free by 2023.

The panels generated enough electricity in the first week to run an average UK home for a year.

For the owner, PepsiCo UK, this is the first of many ways the company will increase the percentage of renewable energy they use. The results have spurred them on and they are now even more focused on reaching their ambitious carbon reduction goals.

Princes Gate Spring Water



In June 2014, the iconic Welsh water brand, Princes Gate was confirmed as Carbon Neutral at their Pembrokeshire site.

This has been achieved by installing solar panels, building two wind turbines on site, moving from procuring bottles to blowing their own bottles on-site and using new energy efficient LED lighting schemes.

In 2013, the site attained ISO equivalent Green Dragon Level 5 Environmental Standard accreditation.

Reducing waste

Over the past 5-10 years, waste has increasingly been viewed as a valuable resource that should be reused or recycled and only be sent to landfill if no alternative option is appropriate. To achieve this, all sectors must contribute, which is why we are working towards sending zero waste to landfill and preventing waste from occurring in the first place.

To do this we are:

- Segregating waste on site to minimise contamination
- Reducing packaging
- Refurbishing old equipment
- Using reusable pallets and crates
- Acting on advice from WRAP's waste prevention reviews

Highlights:

- Roadmap signatories are diverting around 94% of their waste from landfill.
- A joint initiative with the British Beer and Pub Association and WRAP to reduce product loss to sewers and waste that goes to land injection, with results due towards the end of 2014.

Case study:

Encirc



Encirc is a UK market leader in glass container design, manufacturing, bottling and logistics solutions. It produces more than 6.5 million glass bottles and containers every day.

With waste increasingly being viewed as a resource, all scrap packaging from within Encirc's facility is recycled via an on-site contractor, while cardboard, plastic and label backing are baled and sent for recycling. Layer pads, top frames and pallets are cleaned, refurbished, and re-used; while all scrap metal is kept separate and sent for recycling.

The teams also reuse glass to prevent waste. This results in a significant reduction in raw material and energy usage.

An on-site glass recycling scheme also encourages employees to recycle their waste glass. The company then purchases this glass and donates the money to a designated charity.



Our wider responsibilities:

Health and wellbeing

The soft drinks industry is committed to helping customers live healthier lives and make choices that are right for them. Our members have made substantial changes to their product ranges, through reformulation, introducing low and no sugar options, offering a wider range of portion sizes and through innovative marketing campaigns. Several leading members are signatories to the Public Health Responsibility Deal which demonstrates the industry's commitment to working in partnership with Government on this issue.

Soft drinks without added sugar now make up around 60% of the market, up from 30% 20 years ago. The UK's leading soft drinks companies are increasing their collective advertising spend on low and no calorie drinks by 49% in 2014 – up almost 70% since 2012. The soft drinks industry has also adopted a policy whereby it does not advertise soft drinks containing added sugar to children under 12 years old; a number of companies go further and will not advertise products of any kind to this age group.





About BSDA

The British Soft Drinks Association represents UK producers of soft drinks including carbonated drinks, still and dilutable drinks, fruit juices and smoothies and bottled water. BSDA members are responsible for the vast majority of products on the British soft drinks market.

Our principal activity is to represent the interests of the soft drinks industry both at UK and European level, ensuring that the industry's perspective is considered and the impact of regulations is fully understood.

As the collective voice of the UK soft drinks industry, the BSDA provides a common industry view on the legal, technical and social issues concerning soft drinks to the media and political audiences.

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