

thirst choice

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**Increasing levels of
"on the go" recycling
amongst today's
youth**

Today's youth are by far the largest consumers of beverage cans, many of which are drunk away from the home. The question of how to increase "on the go" recycling rates for the 16-24 year old demographic has often been asked, but how many times have they themselves been asked?

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Increasing levels of “on the go” recycling amongst today’s youth continued from page 1

The Can Makers set out to redress this imbalance and commissioned a group of university students to write a report into the barriers to recycling “on the go” and potential solutions to overcome these barriers. The students, all of whom are heavily involved in their Universities’ sustainability programmes, were selected from a range of universities across the UK, they are:

Adam Cooley

Oxford Brookes University

Adam is currently studying towards his final year of a degree in Environmental Sciences.



Paul Gold

Leeds University

Paul has completed a History degree and is now the Community Officer for the Students’ Union whilst undertaking a sabbatical.



Rich Gorman

Bangor University

Rich is a 2010 graduate in BSC Sustainable Development and is currently working at Bangor University Students’ Union as Vice-President for Societies & Sustainability.



Leonie Harrison Byrne

City University London

Leonie has completed the Foundation Degree; Live Music Event Management and Production and is now undertaking the BA Creative Industries Degree. Leonie has a big interest in the environmental sustainability of live music events which is now a major concern across the industry.



Ben Middleton

Plymouth University

Ben is in his third year, studying for a Geography BA. Ben is the Environment and Ethics Chair for Plymouth Students’ Union Parliament, as well as running a society aimed at increasing awareness of environmental issues.



The project kicked off with a visit to a drinks can manufacturing plant and a beverage can recycling plant in Wakefield and Warrington which showed the students the whole lifecycle of the drinks can.

On the back of these visits, they were asked to produce an independent report advising how to best increase “on the go” recycling rates. They commenced this by conducting research amongst their peers into why they don’t recycle more out of the home. The research took the form of an online poll which was completed by 100 students across the five universities and asked questions around recycling behaviour, awareness of recyclable materials and confidence in the recycling system.

The survey found that 75% of the respondents were unsure whether the waste they recycled actually went into new products. This showed a huge lack of confidence in the value of recycling and goes some way to explaining why young people don’t recycle more. Slightly counter-intuitively perhaps, when asked if they would recycle more if more bins were available, an overwhelming 88% said that they definitely would.



In fact, one of the respondents was quoted as saying: *“There just aren’t enough places about to put your recycling, I’m not going to wander about town with an empty bottle looking for the nearest bottle bank, it’ll go in the first bin I see.”*

Comments such as this highlighted the fact that infrastructure for “on the go” recycling is not sufficient to cope with the amount of recycling produced by this age group, let alone the rest of the population.

Extensive desk research was carried out and found, amongst other things, that there were inconsistencies in usage of recycling symbols, both on pack and on recycling points. In several situations, multiple symbols were used on one item of packaging, often in a misleading way.



As part of their recommendations, the student panel advocated a two pronged approach. Firstly to look at how messages to recycle should be delivered, including targeting the right media and locations and making sure recycling symbols are consistent on both bins and packaging. Secondly, improving recycling infrastructure was seen to be an essential step in improving “on the go” recycling rates.

Recommendations for message delivery included targeting major sporting events (for example the 2012 Olympics and football matches) and parks. Media was also looked at, interestingly social media was found to be ineffective for delivering recycling messages. When asked if they paid attention to social media advertising, only 8% of survey respondents said that they looked at the adverts as a matter of course. Therefore it was reasoned that television documentaries were a good way to communicate these messages, specifically addressing the concerns that young people had with the efficacy of recycling.

It was also suggested that messages should be delivered at point of sale and point of consumption, both of which should tie in with messages on recycling infrastructure. The **“purchase, consume, discard”** cycle is the optimum time for messages to be delivered and as such provides the ideal platform to engender behavioural change.

In addition to clarifying messages to recycle, there should also be the opportunity to do so. It was clear from the research results that there were, simply put, not enough bins. Whilst it’s clear that the resources are not available to simply put more recycling bins on the street, it could be feasible to replace waste bins with recycling bins once they have reached the end of their life.

It was also found that the bins themselves were not always consistent in their design. Some were three compartment bins, others two compartment and yet more still were four compartment bins. Whilst this is to do with the way that local authorities deal with recycling, it was found that the variety of bins confuses many people, and things that otherwise would have been recycled, end up in the waste bin. If infrastructure is seen as part of a recycling chain, starting with point of sale, continuing with packaging and ending with infrastructure, it becomes clear that homogenous bin design plays a key role in ensuring that more things are recycled. The results of the study are now being shared with various representatives from government bodies, industry groups, brands and retailers. The Can Makers are considering how to take forward the issues raised in the report.

For a full copy of the report email
canmakers@onechocolatecomms.co.uk

Every Can Counts



Building on its successes since its launch in 2009, the Every Can Counts programme, sponsored by The Can Makers, had a busy year in 2010 with activity across the board at a huge variety of events and with many different organisations.

To date, 4000 Every Can Counts Collection points have been established around the UK in over 1,000 sites and an impressive uptake from over 470 organisations – from large businesses, local government and universities, to

shopping centres and beaches. The programme has also been promoting recycling at major music festivals, with a great line up for 2011. Every Can Counts is helping organisations and events to increase the recycling rates for drinks cans used outside the home and opportunities to recycle “on the go”. In fact, Every Can Counts has been so successful in the UK that similar schemes have recently been launched in France and Austria.

Rick Hindley of Every Can Counts commented: “Each year around 30% of drinks cans sold in the UK are consumed “on the go” and it’s fantastic that not only are existing customers continuing to use the programme effectively, but we’ve also had a tremendous number of companies and organisations join. 2011 is already showing signs of being a very strong and exciting year. In addition to workplaces, through our activity at festivals, shopping centres, beaches, local authorities and many more, we are able to spread the message about the infinite recyclability of drinks cans and encourage people to recycle their drinks cans while they’re out and about.”

Every Can Counts proven success is evident not only through the impressive number of organisations that have taken up the initiative long-term, but also by the diversity of organisations represented within those numbers. Every Can Counts appeals to these organisations through the ease with which it can be set up and is there every step of the way, to help get the best out of recycling.

To find out more about Every Can Counts, their activities and how to get involved visit www.everycancounts.co.uk, follow them on Twitter @everycancounts, or visit their YouTube channel for videos and case studies.

DrinksPack '11

WRAP's Drinkspack '11 conference, held in April gave retailers, brand-owners and suppliers in the beverage sector the opportunity to hear the latest in innovation, market performance and sustainability. Among the speakers were representatives from Canadean, SAB Miller, Marks and Spencer and Britvic. The Can Makers were asked to discuss market developments and provide an insight into the complexities surrounding environmental impacts.

Nick Mullen, Director of the Metal Packaging Manufacturers Association presented the industry's perspective focusing on the long-term growth of beverage cans alongside continuing innovation - both behind the scenes operational

developments and eye-catching creativity to support the brand.

Having demonstrated that 2010 was a record year for the UK market, with 9.4 billion cans produced and filled, Nick went on to discuss the implications of carbon measurement under Courtauld 2 and how metal packaging could deliver continued environmental performance.

The presentation highlighted that the approach of allocating recycled content to individual metal products is in reality impractical and indeed counter-productive; doing so would in fact create additional environmental burdens. He explained that, in Europe, metal is produced with in excess of 50%

metalmatters - recycling “more things more often”

metalmatters is a pilot initiative set up by Beverage Can Makers Europe (BCME), WRAP, Novelis, and Tata Steel to encourage householders “to recycle more things more often” through current local authority recycling infrastructure. The initiative set out to discover why, when over 95% of local authority residents have access to recycling schemes, capture rates are at a relatively low level of 40% to 50%.



The project was based on extensive research, including a National Waste Analysis and analysis of the WRAP report “Barriers to Recycling at Home”, which found that overall recycling levels of metals were surprisingly low.

metalmatters set up a consumer testing panel to explore attitudes to recycling which showed that there was one overriding concern: people weren’t convinced that the things they recycled were actually being recycled.

Norman Lett, Project Leader, **metalmatters**, commented: “The project’s goals were to increase existing household metal recycling rates by at least 10% and create a ‘best practice’ model. We came to understand that the key to

success was education, to encourage people to recycle more things, more often. In our pre-campaign research many people thought recycling was either a waste of time or that, despite their best efforts, the materials then didn’t actually get recycled”. In order to address these concerns, messages and advertising collateral were developed which highlighted what happened to metal when it was recycled.

The groundbreaking pilot project, was conducted over 6 weeks in cooperation with Nuneaton and Bedworth Borough Council (NBBC) and East Hampshire District Council. The main trial in NBBC was conducted over several stages. Research was conducted to gauge residents’ attitudes to recycling followed by a leaflet drop, combined with advertising on billboards, bus shelters, recycling vehicles and in local press. A second leaflet was delivered at the end of the trial and a second, post-intervention, study conducted. The collections were weighed to establish the amount of metal collected over the trial period.

After the **metalmatters** campaign there was an overall attitudinal shift, with almost one in five respondents agreeing that the campaign had encouraged them to recycle more metals. In NBBC there was a significant increase in the capture rate of metals to 12.9%. Additionally, the post-intervention findings highlighted a marked shift in attitude and there was a 22% increase in people who recycled 17 or more items.

These results are now being analysed to see how this model might be used by other local authorities across the country, more news later.

For more information visit www.metalmatters.org.uk



recycled material but attempting to move recycle to accommodate a specific need would require substantive and additional logistical and operational stages.

Nick went on to illustrate that Recycling Rate is the key carbon indicator as every can returned to the process displaces its own weight in raw materials and up to 95% of the energy needed to produce another can; the industry focus on recycling has resulted in a 3 fold improvement over the past decade to a point now, where the rate in the UK is approaching 60%.

The sustainability of metal as a packaging medium was also

presented, explaining that the efficient management of metal as a resource produces, the opportunity to constantly and continuously re-use the same material indefinitely. The fundamental elements that produce steel and aluminum do not degrade nor disintegrate – they can only be moved, creating a material which becomes permanently available, posing the question; what is more sustainable than permanent?

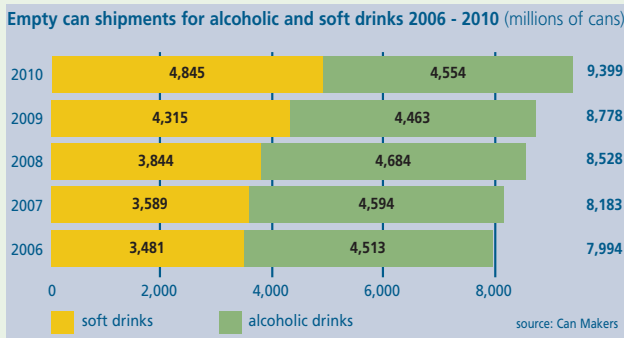
DrinksPack ‘11 proved an ideal forum for the industry to explain how metal packaging is at the core of a sustainable future whilst addressing increasingly difficult issues impacting on the beverage supply chain.

The Can Makers UK Market Report 2011

Overview

Can shipments in 2010 were strong, particularly in carbonated soft drinks (CSDs) with double digit growth year on year, helped no doubt by the good summer weather. The beer market also resumed growth and performance was enhanced by the effect in volume terms of a "second Christmas" brought about by increased retail sales around the time of the World Cup.

Market for drinks cans - UK and Eire



Shipments of cans in 2010 were 9,399 million, an increase of 7% on 2009, despite the recession. 2010 was the 11th year of continuous growth for drinks cans.

The CSD sector was a stellar performer in 2010 with shipments of 4,845 million, an increase of 12.3% on 2009. Indeed this market has grown by 1 billion cans since 2008 and CSD cans now represent 51% of all cans shipped for the first time since 2002.

The alcoholic drinks sector has resumed its long term growth trend with 4,554 million cans shipped in 2010, an increase of 2% on 2009.

European can market

Total can shipments in Europe resumed growth in 2010 at 54.1 billion, an increase of 2.7 billion cans or 5.2% on 2009. 27.8 billion were for alcoholic drinks and 26.4 billion for soft drinks.

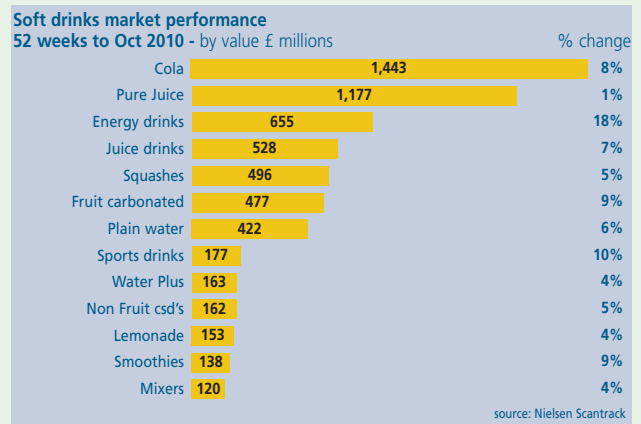
In Western Europe 42.6 billion cans were shipped an increase of 6.1% on 2009, with strong performance in the Scandinavian countries, Austria, Netherlands, Portugal, Turkey and UK which remains the largest national market for drinks cans.

In Eastern Europe 11.5 billion cans were shipped an increase of 2.1% on 2009, with 9.3 billion for alcoholic drinks and 2.2 billion for soft drinks. Russia, The Czech Republic and Slovakia had the most growth.



Soft Drinks

Soft drinks market



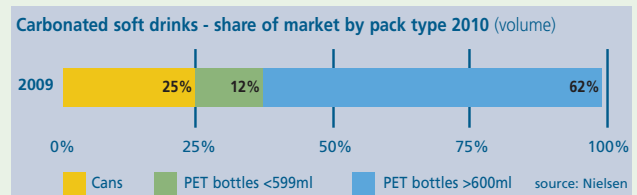
The soft drinks market was worth £6.1 billion at retail value in the year to Oct 2010. Energy drinks and sports drinks performed very well, with cola another strong sector. Smoothies have resumed growth after declining in 2009, due to the recession.

Energy and sports drinks are more reliant on the impulse sector of the market than other CSD's, with 53% and 47% of sales respectively. This contrasts with cola where 27% of sales are in the impulse sector and 73% in multiple grocers. In the 12 months to October 2010 total soft drinks value increased by 6.4% and volume by 2.4%. In multiple grocers, soft drinks along with beer wines and spirits led the way in growth terms across the categories.

Source: Nielsen

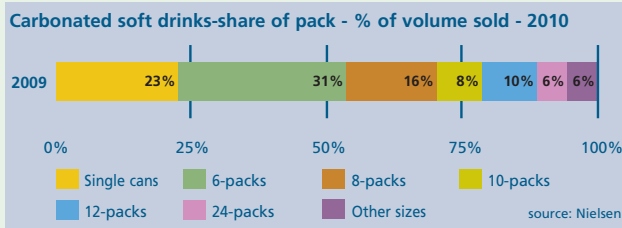


Pack shares



The relative share of market by pack has remained consistent in the Nielsen universe, with cans accounting for 25% of the volume of CSDs sold and 55% of the individual packs. Within the can sector, small size cans – up to 25cl, grew by 17% reflecting the growth in sales of energy drinks referenced earlier.

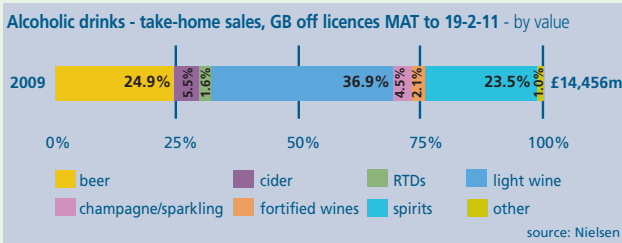
Multipack shares



Within the pack size mix, there were changes in 2010, with growth in the sales of 8 packs - which more than doubled their share. This was at the expense of 6 packs - no doubt due to promotional activity. Twelve and 24 packs also saw increased volumes.

Alcohol

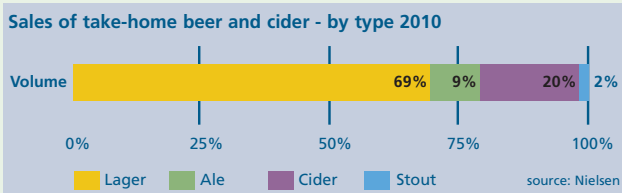
Alcoholic drinks market



Cider grew ahead of all other major categories in both value 8% and volume 5% terms in this MAT. Spirits grew in value by 6% but only 1% in volume terms. Beer grew in both measures, by 3% in value and 2% in volume.

Other categories that grew in both value and volume were champagne and sparkling wine. Light wine grew in volume by 3% but decreased in value by 2%, as the effect of price deals showed through. Only fortified wines regressed in both value and volume terms.

Take-home beer and cider - by type

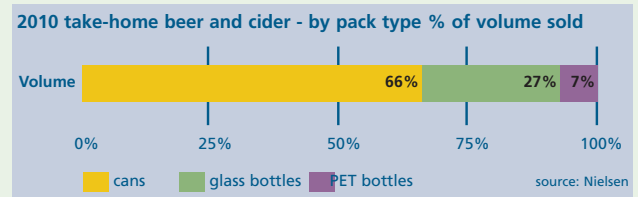


In 2010 there were small changes in the mix of beer and cider sold in the take-home sector. Lager and stout remained level, with cider taking 1% share from ale.

Premium lager and cider continued to grow, with a decline in the volume of standard lager.



Take-home beer - by pack type



Cans are the main pack for take home beer and cider with 66% of the total volume sold. In 2010 cans share of lager was 71%, ale 69% and cider 43%.



Multipacks

Multipacks are the principal means of retailing take home beer and cider. Single cans account for only circa 2.5% of total sales – most of which are sold through off licence outlets.

Small and medium multipacks (4 - 12s) have regained their importance in the pack mix for beer and cider cans in the last year with 12 packs particularly important at Christmas, although 15 packs were the most popular during the World Cup. Larger 18 and 24 packs have declined in importance, no doubt due to their relatively high retail value.

Outlook

Looking to the future the prospects for both markets are in part influenced by the overall economic situation. If the major multiples continue to promote the liquor and soft drinks sectors well ahead of other categories, they should perform well, as they have done in 2010.



A message from the Chairman

I am pleased to report another year of successful growth for the drinks can, both in our home market the UK & Eire and also in the wider European arena. Although the effects of the recession have impacted on many business sectors the canned beverage markets have performed extremely well. In the UK & Eire empty can shipments were 9,399 million in 2010, an increase of 7% on 2009 and the eleventh year of continuous growth. This growth was led by can sales for the soft drinks sector, which increased 12.3% on 2009, with can sales for the alcoholic drinks sector increasing 2% mainly driven by beer and cider sales around the time of the World Cup described as a "second Christmas". In Europe can shipments also achieved successful growth at 54.1 billion, an increase of 2.7 billion or 5.2% year on year.

The year 2010 saw Every Can Counts go from strength to strength. Since its launch 4,000 Every Can Counts Collection points have been established around the UK with an impressive uptake from over 470 organisations – ranging from large businesses, local government and universities to major music festivals, shopping centres and beaches, all of which are increasing the recycling rates for drinks cans used outside the home.

Elsewhere, BCME has been working hard to educate consumers and businesses alike about the sustainable benefits of the beverage can and encouraging them to recycle more - **metalmatters** is one such example. The ground-breaking pilot project was designed to increase kerbside metal recycling rates and the six week trial examined barriers faced when it comes to recycling from the home and was conducted in conjunction with two local authorities. It delivered significant results including a



12.9% increase in metals recycled in the biggest trial area of 54,283 households. In fact, **metalmatters** has recently been recognised by the National Recycling Awards 2011, the results of which will be announced in July.

In this edition of Thirst Choice, you will see the results of the student study we commissioned into improving the extent of "on the go" recycling. As society changes, "on the go" consumption of both food and drinks is becoming an even more dominant trend, especially amongst young people. We hope that the study will help concentrate efforts on ways to make "on the go" recycling an everyday occurrence and significantly increase recycling rates.

In closing I would like to pay tribute to the work of my predecessor as Chairman Vince Major. He led the Can Makers in a testing and challenging period and has left a solid platform for us to continue promoting and sustaining our industry, we wish him well in his new European role.

I hope that you enjoy this edition of Thirst Choice.

Geoff Courtney Chairman

White Papers

The Can Makers this year commissioned two White Papers, looking at different aspects of the beverage can. *Total Innovation: The Future in a Can* delves into recent developments, looking at the innovations that keep the beverage can at the cutting edge of drinks packaging. *Global Iconic Beverage Can Design and Marketing* explores the world of iconic beverage can design and marketing, focusing on artwork and packaging innovation, the motivations behind them and a look at what the future holds for cans.



For copies of the White Papers email
canmakers@onechocolatecomms.co.uk