

Report France

| | |
|---|----------|
| 1. A Description of the Status Quo on Reuse Packaging..... | 2 |
| 2. How Reuse developed..... | 3 |
| 3. Legal Laws for Reuse Packaging | 4 |
| 4. Distribution / Redistribution of Reuse Packaging..... | 4 |
| 4.1 Distribution Systems for Beer | 4 |
| 4.2 Distribution Systems for Water | 5 |
| 4.3 Distribution systems for soft drinks | 5 |
| 4.4 Distribution Systems for Wine..... | 6 |
| 5. Marking Systems for Reuse..... | 6 |
| Sources: | 7 |

1. A Description of the Status Quo on Reuse Packaging

Reuse primary packaging in France is reduced to a minimum for all beverages except beer. For all other goods, reuse packagings could not be detected.

The consumption of beverages (see Table F-1) in France is dominated by bottled water (95,5 l / capita, a) which commands one of the leading positions in Europe. Multiplied by the 58 millions French people who live, they have the second biggest water market in the EU.

Milk consumption (94,6 l / capita, a) is average. Since 62,7 litres of wine make up the leading position France commands the biggest wine market in the European Union.

Soft drinks and juices are also in the middle range, while beer consumption is the smallest in Europe.

Table F-1: Beverage consumption in France 1994/1995/1997

| | per capita in litres | Total in Mio litres |
|---------------------|-------------------------|------------------------|
| soft drinks | 61,7 | 3.578 |
| beer | 35,2 | 2.042 |
| flat water | 73,8 | 4.280 |
| carbonised water | 21,7 | 1.259 |
| wine | 62,3 | 3.613 |
| juices | 16,5 | 957 |
| milk | 94,6 | 5.487 |

The markets for bottled water, beer and soft drinks are very highly concentrated. In each market segment a group of 2-3 companies control 80-90% of the market.

The number of market players in juices and milk is higher, while the market for wine is extremely varied with thousands of producers, bottlers and wholesalers.

Reuse bottles/crates only dominate in the HoReCa channel, but even there their market share is declining too.

The actual national figures for reuse primary packaging are only available for beer, water and soft drinks. The reuse of wine bottles or the reuse of standard bottles for cider or sparkling wine are not registered anywhere. Therefore, only small examples can be described.

The actual figures for reuse primary packaging are:

Table F-2: Reuse packaging for beverages

| | % of total consumption | |
|--------------------------|------------------------|---------|
| | bottle | draught |
| beer | 14 | 20 |
| water (mineral water) | < 5 | |
| soft drinks (carbonised) | 3 | |

There are some small regional producers for cider and juices i.e. Les Celliers Ass., Pleudihen (1) use old standard 1-liter beer bottles (AFNOR NF H35-057 BVL-bottle). The juices are sold in the region through wholesalers and retailers in standard reuse plastic crates.

Bottles are collected at the retailers and HoReCa by some specialised companies (2), who sort out the bottles and offer them to fillers. In that system, not only wine bottles are treated but also bottles for champagne are too, which are used for bottle fermentation in the cellars. Some of these companies co-operate with wholesalers and service companies (re-conditioners) in Germany and get French standard bottles in exchange for German type bottles from there (3).

2. How Reuse developed

France was one of the first countries in Europe where the old reuse packaging systems were destroyed when a rapid change in favour of one-way packaging led to their demise. First, it happened with water in the 70's, when reuse glass bottles were replaced by PVC bottles and one-way glass. Even so, detailed figures from that time are not available. In the 80's and early 90's, one-way glass saw a decline as well and PVC got a market share of more than 90% (see Table F-3 i.A.). Within the last three years another basic change toward one-way PET-bottles has taken place and they now hold a market share of over 80% of water sales (4). The main reason for this situation does not stem so much from a bad ecological image on the part of the French, which in fact, isn't of much concern in France, but because PET bottles are just so inexpensive.

The beer bottle system also declined in the middle of the 70's, when one-way glass began its success story in the supermarkets and big hypermarkets which nowadays are popping up like mushrooms in France.

The total consumption in the last twenty years remained more or less stable hovering around 2,2 Billion litres. An import surplus of another 0,2 Billion litres is not registered according to the type of packaging (5). Most of it may be one-way glass.

Table F-4 i.A. shows the packaging structure for beer brewed and sold in France.

The market share for the reuse beer bottles went down slightly but consistently until 1993. After a short period of growth, it started to decline again in the following year. Most of the losses of the reuse system were taken over by one-way glass and only to a smaller extent by cans (actually 7,1%).

The reuse market share for soft drinks was quite high until the late 80's (around 40%). In the days when the EU-Packaging Directive 62/94/EC was being discussed in Brussels and Strasbourg, the final breakdown of the reuse system for soft drinks in France was taking place. The market share for 1997 was around 3% and forecasts say that in 1998 it further will decline down to 2,7%. Much like

bottled water, the dominant packaging is one-way PET (62%), while cans account for a share of 11% and one-way glass makes up around 10% (see Table F-5).

A much slower change took place in the wine branch. Here table wine and country wine which has been bottled for a very long time in reuse bottles changed to one way glass. In the last few years, the market share of wine in beverage cartons and plastic bottles has grown rapidly. However, detailed figures are not available.

3. Legal Laws for Reuse Packaging

There is no legal setting established to support reuse. Reuse packaging is discussed in France.

The Decret Nr. 92-377 from April 1st 1992(6), which was launched rather rapidly, does not acknowledge the reuse packaging systems. On the contrary, The Decret uncovered an inexpensive way to handle packaging waste treatment. In comparison to the recycling targets which were established in the other EU-member states, the decree only asks for 75% recovery in 2002 without setting any quantitative targets for recycling. It did give strong incentives for all of the one-way packaging producers to get control of the back stream of their products, but without a certain amount of responsibility for them to achieve a high level of environmental protection. In some cases, the contracting done by packaging producers directly with the communities caused the existing reuse systems, the reuse of wine bottles from bottle bank collections, to be destroyed or prevented. In the contracts between the glass manufacturers and communities, it was determined that it would not be permitted for good reusable bottles of the cullets to be sorted for reconditioning (7). Another incentive which supports the recovery of packaging waste is the reduction of the VAT Value Added Tax for collection and sorting activities from 20,6 % to 5,5%, which is to commence in 1999, and which will cause an additional disadvantage to the reuse packaging systems (8). As long as retake and redistribution is part of the normal activities for companies, all of the costs within the redistribution chain will be taxed on the higher level.

4. Distribution / Redistribution of Reuse Packaging

The distribution of reuse packaging to HoReCa, the only relevant distribution channel left, is done by wholesalers. Most of the French wholesalers have actually been taken over by one of the big breweries or soft drinks producers. Redistribution leads to distribution and vice versa.

4.1 Distribution Systems for Beer

Beer is the only beverage left which is distributed in reuse bottles, not only to HoReCa but also to some of the other retailer chains. The following standardised glass bottles are used as primary packaging:

| | |
|------------|--|
| NF H35-054 | Glass soft drink and beer bottle „Apollinaris“ 0,25 and 0,33 litre |
| NF H35-055 | Glass bottle 0,75 litre standard type for beer |
| NF H35-057 | Glass soft drink and beer bottle „BVL“ 75 und 100 cl |

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The market relevance for each of the different bottles are calculated in table 4 (see Annex III).

Sales of the high volume bottles (0,65 to 1,0 litre) have declined from 33% in 1985 to 12,4% in 1996. In the past these bottles, made up the dominant part of the reuse packaging system. In that regard, one way packaging does not have any relevance.

The small volume bottles, 0,25 to 0,5 litres, have increased their market share, while the share of one way packaging grew tremendously. One way cans doubled their filling quantities within the last decade but still only have a market share of < 10% (9).

These bottles circulate in standardised non individual plastic crates of the „Union de Brasseurs (UB)“. The Union de Brasseurs has not been considered an organised pool organisation ever since the Netherland's brewing tycoon HEINEKENS took over the companies which were once assembled in that organisation. The unique crates do not bear any company or brand labels.

4.2 Distribution Systems for Water

Most of the nationally distributed mineral water sources (Vittel, Evian, Volvic, etc.) offer their products in reuse packaging to restaurants. Therefore, each company runs its' own bottle range (individual bottles with their own brand punt marks). Normally, these companies use two to three different bottles (0,25 / 0,5 and 1 litre) in brand-owned plastic crates. Since most of the big brands distribute their water from one source to locations all over the country, the transport distances for distribution/redistribution are extremely long.

Only one source, the Alcasse, CAROLA, also distributes their reuse bottles to the retail channel. This only happens though in the region of production. Detailed figures about that distribution have not been made available.

For the growing convenience market, some sources started to distribute mineral water and table water in 18,9 litre polycarbonate reuse tanks to offices and canteens (i.e. the Société des Eaux Miérales Ogue SEMO (10)). As these systems normally use one way plastic cups to serve the water, they can only be registered as hybride systems.

From 1969 to 1987, an organisation called Caisse France Plastique existed for the distribution of water bottles. This organisation which was later joined by KRONENBOURG, VITTEL, EVIAN and the plastic crates producer ALLIBERT, established a unique plastic crate for 1-litre bottles, the CFP-crate. However, the organisation was closed down when the big players reduced their involvement in reuse packaging and a massive overhang of crates and deposit claims resulted.

The CFP-crates still circulate in the market as a Type E open pool. Anybody can buy the crates at retailer outlets for a small price. Actually they are mainly used for different types of wine bottles but they can also be used for one way bottles for spirits etc.

4.3 Distribution systems for soft drinks

Standardised reuse systems for carbonised soft drinks no longer exist in France. Only smaller volume soft drink reuse bottles with the common brand-owned shapes are used (COCA COLA, ORANGINA etc.).

Regional producers of juices use standard bottles (NF-H35-057) to a certain extent.

4.4 Distribution Systems for Wine

Several AFNOR standards for wine bottles exist which can be reused if they fulfill all of the technical requirements for reuse (see Table F-7). The only deficit is that there are barely any retake and redistribution structures left, or they hardly ever existed.

Table F-7: AFNOR standards for wine bottles - capable to be reused

| | |
|------------|--|
| NF H35-041 | Packaging, Glass wine bottle 0,75 l „cuve close“ |
| NF H35-053 | Packaging, Glass wine bottle 0,75 l „light weight bottle from Alcaass“ |
| NF H35-056 | Packaging, 0,75 l Glass bottle for Champaign |
| NF H35-059 | Packaging, Glass wine bottle German Type |
| NF H35-060 | Packaging, Glass wine bottle 1 l „six star“ |
| NF H35-063 | Glass wine bottle 0,75 l Burgundy Type Tradition |
| NF H35-064 | Packaging, Glass wine bottle 0,75 l Bordeaux Tradition |
| NF 35-074 | Packaging, Glass wine bottle, Burgundy Type Alégèr 0,75 l |
| NF 35-075 | Packaging, Glass wine bottle, Bordeaux Type Alégèr 0,75 l |
| NF H35-083 | Packaging, Glass wine bottle 0,375 l „Alcaass Type“ |

Two ways for the redistribution / reconditioning are being established or were already established.

1. The retake by retailers consisting of a mix of bottles which have been redistributed to the service companies who sort and clean the bottles. Those companies do still exist, but they are confronted with declining interest on the part of the retailer chains.
2. The collection of bottles by bottle banks and the consequent separation of good bottles from out of the cullets. This system was established in Rungis by ECOBOUTEILLE for the region of Paris and ran for many years. It was closed down in 1993 and nowadays only makes the colour separation of the cullets by colour for the glass factories of Saint Gobain.
An identical system was supposed to be built up in the Alsace region, but was undermined by the direct contracting of the glass factories to the communities. Now the collection of glass bottles is subsidised by the ADELFE, but none of the bottles are allowed to be sorted out from the bottle bank material.

Only one standard 1-litre- bottle is identified with six stars as a „reuse bottle“ (NF H 35-060). This bottle is used for table and country wine and was very common in French retailer shops. It's use has been declining very rapid in the past few years, as retailers stop retaking the reuse bottles.

5. Marking Systems for Reuse

The only known marking for reuse is the six star symbol used as a punt mark for the reuse wine bottle (NF H 35-060).

Sources:

- (1) Les Celliers Associés, F-22690 Pleudehin (Val de Rance)
- (2) Dansk Flaske Genbrouk, St. Hippolite, Alsasse
- (3) Serge Cheveau, Bennwihr / Ladoix-Serrigny
- (4) Canadean, TradeInterviews, June 1998.
- (5) CBMC, Confédération des Brasseurs du Marché Commun, Brüssel
- (6) Decret No. 92-377 du 1er avril 1992 portant application pour les déchets résultant de l'abandon des emballages de la loi n° 75-633 du 15 juillet 1975 modifiée relative à l'élimination et à la récupération des matériaux, Journal officiel de la république française, 3. avril 1992 page 5003 ff, Paris 1992.
- (7) Danks Flaske Genbrouk, Kopenhagen, 1998.
- (8) EUWID Recycling, Nr. 37 vom 8.9.1998, S. 16 „Neues Konzept für französiches Entsorgungskonzept vorgestellt“, Köln, 1998.
- (9) Brasseurs de France - Association des Bresseurs de France: Les chiffres de la bière, page 7, Paris, 1998
- (10) Neue Verpackung 9/98, Heidelberg, 1998.
- (11) Ecoboutaille, Rungis, company description, Paris 1989.

