

Report Ireland

1. Description of status quo on reuse packaging

Reuse packaging for markets other than the beverage market has not been detected in Ireland. Most likely there are some refill systems in green shops but they do not have any relevance in the market.

The most relevant beverages in Ireland are milk and beer. Ranking just behind Finland, Irish people drink the most milk in Europe, on the average it was 178 litres per capita in 1997. Beer is the second most important ready-to-drink beverage with an average consumption of more than 112 litres per capita and year. Lemonade which, too, has more than 100 litres per capita and year is the third big market (see Table 1.2 of the main report).

Juices, water and wine do not make up a relevant amount of the quantitative consumption of beverages.

The actual reliable figures of the packaging mix were not made available with the exception of beer. The beer market is highly dominated by the Irish pubs. More than 80% of all beer is consumed in HoReCa. In no other country is the beer consumption share in pubs higher (see Table IRE-1 i.A.).

In 1997, the most dominating primary packaging for beer was the cans (60%) followed by one way glass bottles (22,%). Only 17% are in reuse bottles with a big share of them going to HoReCa as well. The market share of beer in primary packaging declined in the 1980`s to under 14%. With the introduction of the cans in 1988 – 92, the market share of beer in primary packaging went up rapidly. The share of one way glass bottles has somehow remained stable for many years, staying around 22 - 25%.

The situation is totally different in the soft drinks market. Only 6-10% are consumed in HoReCa. Most of the soft drinks, lemonade, is sold for home consumption. The dominating packaging here is the one way PET bottle, covering 60% of the market. Cans are next with about 20%, while one way glass takes about a 5% market share (see Table IRE-2 i.A.).

Reuse glass bottles have only a small market share, restricted to sales in HoReCa.

The decline of the reuse system took place in the early 80`s when PET bottles for carbonated soft drinks rose from 7,3 Mio litres in 1981 to 80,2 Mio. litres in 1986 (1)

Reuse systems for bottled water and wine do not exist. Detailed figures about the packaging mix of these beverages were not available. Most of the packaging seems to be one way glass for wine and plastic one way bottles for water. Data on the packaging mix for milk also has not made available by the Irish dairy board.

3. Legal basis concerning reuse packaging

National legislation dealing with reuse packaging does not exist. Legislation according to the EU packaging directive has fixed targets for recovery a share of 55% and was set into force in June 1997 (2).

In 1992, the Irish government discussed a legal proposal to stop the rise in beverage cans. Back then, a ban or even a relevant tax was under discussion (3). After the industry promised to build up a national recycling scheme, the government decided to wait for the EU-Packaging Directive which was started at the time.

4. Distribution / redistribution of reuse packaging

Distribution within the retail channel is characterised by small scale shops and a lack of discounters in the Irish market. The average turnover per work force is 87.000 ECU per year which is the second smallest in the EU (4). The average expenditure for food and beverages in Ireland is the highest in the EU. In Ireland, on average, 33,6% of private households budgets was spent for food and beverages while the average quota in the EU was only 21,9% in 1992 (4).

This retail structure is normally perfect for reuse packaging distribution and retake.

5. Standards on reuse packaging

National standardisation work in the field of packaging does not exist in Ireland.

Sources:

- (1) Coca Cola Press release, Mailand, 1989.
- (2) FEVE, Glass Gazette, 9-1997.
- (3) David Perchard Ass.: Packaging Legislation in Europe, 6/1992.
- (4) Eurostat: Der Einzelhandel im Europäischen Wirtschaftsraum 1996, Luxembourg, 1997