Report Spain

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1. Status quo on reuse packaging

After having considered the different types of reusable primary packaging that exist in Spain, the main type of reusable packaging is the glass bottle. The only products sold in this reusable packaging are liquids; mainly water, beer and soft drinks. Tertiary or transport packaging may be used to facilitate the manipulation of any product or material, not necessarily in the food sector.

2. Reuse packaging for beverages

The following reuse packaging systems are still being used in Spain:

Beer sector:
Glass bottles of 20, 33 and 100 cl.
Non-alcoholic beer in glass bottles of 20 and 33 cl.

Soft drinks sector.
Glass bottles of 180 and 200 cl

Mineral Water sector
Glass bottles of 0, 25 / 0,33 / 0,50 / 0,75 and 1,0 litres

According to some sources, some wine bottles, cider bottles and Cava bottles (Spanish champagne) are washed and reused by the makers. In the case of the wine this only happens with small local wine producers. In the case of cider and Cava, the companies have not admitted that such practices are done because they believe that their image would be tarnished if they said they use the same bottles.

2.1 Reuse packaging for mineral water

The table bellow indicates the volume in litres of returnable bottled water.

Table: 1: Reuse glass bottles for mineral water by volume

Returnable glass.	Mineral water		Spring water		Drinking water	
	With gas	Without gas	With gas	Without gas	With gas	Without gas
¼ litre	64.659,896	65.705,792	1.598,100	2.986,430	411	---
1/3 litre	49.842,008	19.649,328	---	---	---	---
½ litre	134.545,860	30.050,140	2.971,880	10.933,260	640	---
¾ litre	4.611,494	4.722,434	---	43.373	---	---
1 litre	63.967.870	28.156,854	614,319	278,500	449	---
1,25 litres	---	617	---	---	---	---
4 litres	73	---	---	---	---	---
8 litres	2.869.700	---	110	---	630	---
10 litres	2.752.200	---	---	---	---	---
Packaging x 1000	323.322.028	148.901.548	5.294.299	57.571.190	2.130	---
Litres x 1000	218.250.005	70.471.227	3.379.784	39.021.488	5.911,750	---
Packaging %	97,76 %	72,12 %	1,60 %	27,88 %	0,64%	---

· Source: ANEABE (1997).

Data on the consumption and the packaging mix for bottled water is shown in Annex I. The reuse glass bottle held a market share of more than 50% but has had to face a constant decline since that time. The actual quota has reached nearly 10%, while plastic bottles have become the most dominant packaging for water. Reuse is mainly used for HoReCa in the small volume bottles.

2.2 Reuse packaging for beer

Annex II shows the situation of the consumption and packaging mix for beer. Total consumption of beer in Spain sank within the last nine years about 20%. Most of that decline took place in HoReCa.

Home consumption was much more stable during that time. In that market, an enormous jump occurred from returnable bottles to one-way glass bottles, and in a smaller quantity, to cans.

The market share of reuse bottles is actually around 47% of home consumption, but it is still going down constantly. The massive growth in the number of discounter shops and the resulting increasing pressure on reuse packaging gives one little hope that these trends cab be stopped.

2.3 Reuse packaging for soft drinks

The decline of the reuse system for soft drinks has been taking place even faster (see Annex III). Whereas in the middle of the 80's the reuse quota was 80% the current situation is a reuse system which is mainly restricted to HoReCa and keeps a market share of about 12%. This enormous braking down of the reuse system even took place during the four years the EU-Packaging Directive was being discussed.

2.4 Other beverages

Actual data on the use of reuse packaging in other sectors like wine juices, vermouth and milk are not available. Older figures (see Annex III) show that only glass reuse bottles for wine had a considerable market share.

3. Legal basis concerning reuse packaging

All of the regulations related to packaging are established in the packaging Law 11/1997, whose regulations were later developed in the Decree R. D. 782/1998 of 30th April 1998. In this Law, Art°. 4 describes the measures to promote reuse and recycling and contains the following:

> 1° The public administrations may establish subsidies, within their budgetary possibilities, to promote research activities and to develop investment destined for the transformation or improvement of bottling plants that will be necessary for the use of reusable containers, for the use of raw materials derived from recycling in the manufacturing of new containers, or for putting into place activities that favour reuse and recycling.
>
> 2° Those promotion activities which were previously stated can be applied to actions by local authorities or by autonomous regions.
>
> 3° Independent from the previous measures, economic instruments may be applied, including taxes, that would encourage investments with the same objectives and aims as those expressed in point 1°.

At the same time when this Decree was published, an order was published on April 27, 1998 which established the individual quantities to be applied regard to a deposit and the indicative symbol to be used for packaging placed on the market through the system of deposit and return as regulated by Law 11/1997.

The actual packaging law in Spain is somewhat uncertain and leaves all of the decisions about the use of reuse packaging up to the power of competition. In that instance, reuse does not stand any chance against the interest of retailers who want to sell everything in one-way packaging.

4. Distribution / Redistribution of reuse packaging

The distribution of products packed in reuse packaging takes place around the country by way of strategically placed distributors. From each of these central points, distribution takes place within a radius, which oscillates, from a few kilometres to a whole autonomous region of Spain.

With regard to the map of the distribution centres of companies like Coca –Cola or PepsiCo, information was requested from the companies several times, but has not yet been made available. This information will be forwarded as soon as it arrives.

The major form for the distribution of reusable containers to the consumer takes place through restaurants, pub cafeterias and some small retail shops although the latter only makes up a minority. In larger supermarkets and hypermarkets, reusable containers are not commercialised anymore. It is mainly in the catering sector where these products are commercialised.

The Association of Restaurant Businesses and the Association of Food Retailers do not have any statistics regarding the use of reusable packaging by their members.

Related to the description of the logistics of distribution to the food retailers and restaurants, it is necessary to take into consideration that these primary products in reusable containers are liquids which are distributed by companies each of them has it's own logistic. Secondly, the retailers are not associated or organised amongst themselves for distribution purposes.

Small retailers, restaurants, pubs etc. make their individual contracts with the large distribution companies who are then responsible for the distribution of their products when it is required by the customer.

The collection and redistribution is made through the same channels of distribution. Empty reuse packaging is stored by the retailer, restaurant, pub etc. until the delivery truck arrives and an exchange of empty and full containers has taken place. The empty containers are returned to the bottling plant to be washed and refilled.

5. Marking systems for reuse

In reference to the question whether or not it is mandatory to print the word "reusable" on the packaging or label, it should be answered that legal regulations that make this obligatory. The new packaging l, on the other hand, does prohibit the word non-returnable.

In relation to the general regulations for labelling, presentation and publicity, this is governed by the Decree R.D. 1122/ from November 28, 1988.

6. Standards on reuse packaging

There is no evidence that reuse packaging pools exist. On the contrary, in the case of recycling and integrated waste management, a society ECOEMBALAJES, S.A. has been formed where both manufacturing enterprises and distribution companies are represented. They have reached agreements on the costs of managing packaging waste and on an amount for the "Green Point" system that will shortly come into force in Spain, once Ecoembalajes reaches an agreement with the different autonomous regional governments.

7. Number of trips for reuse packaging

On the average, the number of trips per year, or the average age of a reusable container depends on the whole cycle from when the container is filled to its collection and redistribution. The estimations made by the associations of water, beer and soft drinks are the following.

- Bottled Water Sector.

Average number of rotations per bottle: 20 returns.
· Source. ANEABE (1997).

- Soft Drinks Sector.

Data on the average number of trips per bottle has not been delivered by the Spanish soft drinks industry.

8. Constraints and support for reuse packaging

Among all the possible reasons that would explain the reduction in the use of returnable packaging, such as the concentration of filling plants, longer transports, high costs for filling facilities, etc.; some manufacturers have substituted reusable packaging simply to increase the convenience for the consumer because the new one-way packaging is lighter and the consumer has changed his/her habits of consumption.

Equally it can be said that some manufacturers hold the large supermarkets responsible for the reduction because they do not want to organise the collection of returnable bottles. For this reason, they justify their argument that these products can only be sold in small food retail shops, restaurants, pubs etc.
ANFABRA in contrary to that stated, that the majority of soft drink packaging was returnable but this quantity has continuously decreased every year due to the conditions imposed by large stores and distribution channels.

In a survey made by Friends of the Earth 3 years ago with shoppers in the large supermarkets, more than 70% of customers said that they would be willing to use returnable bottles if the supermarkets make them available.

9. Conclusions

In conclusion, it must be said that on the part of all the sectors connected to the management of packaging and packaging waste, from the manufacturers of the packaging to the large retailers, they are campaigning with the objective of decreasing the market share of returnable packaging. All of this is supported by a much too permissive legislation that in effect, does not stimulate reuse. As for the glass enterprises, their goal is to put a greater quantity of packaging onto the market every year, which further causing the number of reusable bottles to diminish. The large retailers, who are anxious to maximise their benefits, put pressure on the companies to change the kinds of packaging so that they can save on retake and storage in their supermarkets. Of course, at the forefront is the consumer, who has become more aware of the surrounding environment. If he/she was really informed with the adequate detailed information, he/she would use returnable packaging. The possibility of this occurring in Spain is practically zero at this time.

Sources:

Decree R. D. 782/1998 of 30th April 1998 on Packaging and Packaging Waste

Decree R.D. 1122/1988 of 28th November

List of contacts:

Spanish Minarel water fillers association (ANEABE),

Asociación de Cerveceros de España, C/ Almagro, 24,

Federación Nacional de Empresas Lácteas, C/ Ayala, 10, FEDEMCO,

Spanish soft drink producers assosiation (ANFABRA), Avda. Menéndez Pelayo, 81

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Asociación de Fabricantes y distribuidores de alcohol, C/ Príncipe de Vergara, 57-59.

Federación Española del Vino, C/ Castelló, 95