British Glass

End of year review
2024 / 2025



Welcome from CEO Dave Dalton



Dave Dalton
British Glass CEO

Without a doubt, the 2024/25 operating year has been the most challenging the industry and the Federation have ever witnessed; more so even than Brexit, COVID-19 or the energy crisis following Russia's invasion of Ukraine.

With new administrations in much of the EU, UK and the USA, the world has become an increasingly volatile and uncertain. Financial markets, protracted and misguided policy implementation and a reluctance to invest are collectively undermining trade and manufacturing output.

It has been striking to watch the shift in global political positions. The EU, with its recent history of strongly enshrined green and socialist agenda, has begun to move towards a more right-wing and defensive stance. In contrast, the UK appears to mirror this shift in reverse, from a right-of-centre Conservative administration to a new, more socialist regime. Both are watching the USA where even greater tidal waves of change are being generated by global trade policies and tariffs turning global trading upside-down. No one yet knows where this will end, but the UK must weather the storm and adapt and survive to trade in the new world order.

Whatever the direction ultimately decided upon here in the UK, rest assured the team here at British Glass has the capability and strength to support and guide the sector through these difficult times to a better-defined future for glass manufacture here in the UK, with world-leading technologies and competitive manufacturing environments to challenge in global markets.

We are actively educating and informing the new officials of Westminster and those in Whitehall of the value of a strong UK manufacturing base, our contributions to GDP/GVA, employment and the environment and showing glass as the future solution to a greener, more circular economy. The UK is well-positioned to lead the world in this future.

Though we acknowledge it is not going to be easy, our team is ready and willing to shoulder this challenge and lead our sector back to prosperity. I look forward to the challenge of 2025/6 and with my colleagues here, will fight with every fibre and sinew of our being to deliver the future we need and deserve.

Meet the team



Dr Nick Kirk
Technical director



Paul Pearcy
Federation manager



Jenni Richards
Principal policy adviser



Mark Pudner
Senior technical adviser



Theresa Green
Information officer



Matthew Kay
Glass packaging policy lead



Holly Shackford
EHS adviser



Gareth Jones
Operations and commercial director



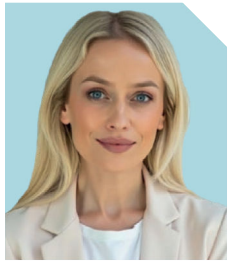
Victoria Adams
Marketing and communications manager



Meg Grattidge
Events and training coordinator



Tom Armes
Content marketing lead



Rachael Kay
PR and communications officer



Callum Hawksworth
Data and administrative officer

Value statements

The team at British Glass work hard to deliver the best service to our members. This statement quantifies, where possible, the value that your company, as an individual member, has received in the last year.

Section one - Membership subscription

Consultations responded to on your behalf	20
One-to-one consultations with your staff	139
Representation of your company's interests at stakeholder / gov forums	439
Enquiries to our information line	101
Press coverage - number of cuttings	589
Press coverage - estimated reach	1,600,000,000
Press coverage - estimated value	£15,100,000

Value statements are accurate as of April 2025

Section two - Environmental policy reliefs

Estimated value of current policy reliefs per annum (2024)

CCL exemption	£51,566,006
ETS free allowance	£41,643,572
RO/FiT/CfD exemption (Jan 24-Mar 24)	£9,584,259
Supercharger enhanced package (Apr 24-Dec 24)	£49,953,774
Indirect cost compensation (only fibre eligible)	£3,174,832
Aggregates levy	£3,253,500
Total policy reliefs	£158,175,943

Note: Policy reliefs have been calculated using member E&E data based on a calendar year as appose to membership year, if member data has not been received, we will have estimated figures based on historic data

Glass Focus Awards 2024

The winners of the 2024 Glass Focus Awards were revealed as industry leaders gathered for a special event at Aspire, Leeds.

Businesses from across the glass supply chain came together to celebrate the achievements, innovations, and contributions of our industry over the past year.

Stoelzle Flaconnage took home the British Glass Company of the Year award along with the Design of the Year – Container award.

The other big winner of the night was Pilkington UK, taking home three awards, including the Innovative Solution award, won together with Zytronic, for their transparent, conductive glass, Powered by NSG TEC™.

British Glass CEO Dave Dalton said:

"It was a pleasure to get together with representatives from the industry in Leeds to celebrate the incredible achievements from across the glass supply chain.

"I'd like to thank everyone who submitted an entry for this year's awards. We're extremely proud of our achievements over the past year and look forward to building on them in 2025 and beyond."

Glass Focus Awards 2024

The full list of winners from the Glass Focus Awards 2024 are:

Design of the year – container (supported by Packaging Innovations and Empack)
Stoelzle Flaconnage – Hearach Single Malt

Design of the year – flat (supported by The Glass and Glazing Federation)
Saint-Gobain Glass UK – Eden

Innovative solution (supported by Glass Technology Services)
Pilkington UK and Zytronic – Powered by NSG TEC™

Health and safety action (supported by Cromwell)
Ardagh Glass Packaging Europe – 'Three Seconds'

Sustainable practice (supported by Brook Green Supply Limited)
Pilkington UK, C-Capture and Glass Futures – Carbon Capture

Rising Star (supported by The Worshipful Company of Glass Sellers of London)
Jack Harper – Ardagh Glass Packaging Europe

Strengthening business through people (supported by One Source HR)
NSG Group and Pilkington UK – Women in the Workplace

Marketing Impact (supported by Awesome)
Encirc and Armstrong B2B – Decarbonisation Animation

SME member of the year
Aegg Ltd

British Glass company of the year
Stoelzle Flaconnage



Trade update

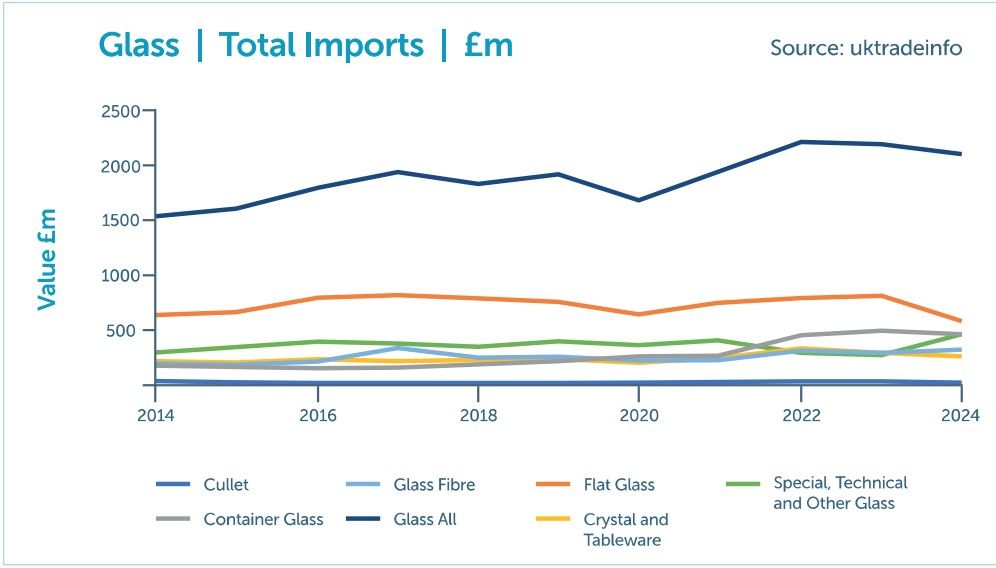
The conditions of the last few years and ambitious UK policy costs have taken their toll on the competitiveness of the UK glass manufacturing sector. Output has declined across the sector. Both imports and exports of glass products fell slightly in 2024. The most significant change in the value of glass imports was in glass scrap or cullet, which has increased (by) 68% in a single year. This supports the continued British Glass position that there is a UK cullet shortage.

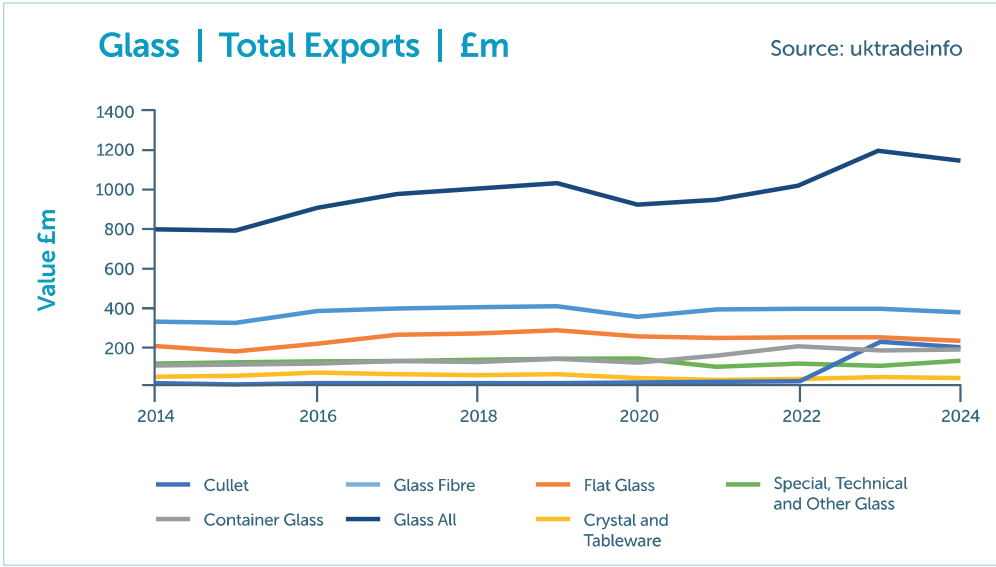
British Glass continues to monitor and report changes in glass imports and exports and share this information with members via a series of reports and policy makers as necessary.

In December 2024, British Glass was invited to submit evidence to the Department for Business and Trade (DBT) for a new UK trade strategy. The response provided information about the UK glass sector, highlighted potential areas of growth and outlined how policy makers could support UK glass manufacturing. The team continues to engage in the ongoing development process with DBT.

British Glass also initiated a government review of the UK Global Tariffs for glass products. These tariffs apply to glass imports that originate in jurisdictions where the UK does not have a free trade agreement. Previously set at levels between 2-5% in the EU, those tariffs were largely liberalised following Brexit. The DBT review seemed unable to prove whether the change in tariffs had had any impact on the glass sector and decided not to change the tariffs. This was disappointing and we continue to explore further routes to rectify the situation.

British Glass continues to work with members on anti-dumping and anti-subsidy cases relevant to specific products, in the landscape of rising imports and increased worldwide glass production designated for export.





Health & Safety update

Health and safety is at the core of everything we do, and the health and safety forward scheme facilitates a common goal of improvement across the glass sector.

One of the scheme's key outputs is the submission of health and safety data enabling the sector to identify any trends in accidents and discuss any best practices. All members of the health and safety forward scheme receive tailored reports that benchmark their performance against industry averages, this allows them to understand their health and safety performance versus the rest of the sector.

The 2024 data collection is now completed, thanks to all the members who provided their data. To the right is a breakdown of the top three RIDDOR accidents over the past three years.

British Glass represents the industry at the HSE's CHARGE group, which is a tripartite body with representation from industry trade bodies, trade unions and the HSE. This allows British Glass to understand the HSE's current enforcement strategies, discuss industry concerns, share industry statistics, work on industry guidance and share best practice among sectors.

This membership year the health and safety committee has provided a forum for discussions on best practice, accident statistics, lessons learnt and any areas of concern. We have continued to review and share feedback on various PPE products to help inform purchasing decisions for members.

Top 3 RIDDOR accidents		
2022	**2023**	**2024**
Slips, trips and falls (17)	Contact with moving machinery (9)	Contact with moving machinery (6)
Contact with moving machinery (9)	Injured while handling, lifting or carrying (9)	Slips, trips and falls (6)
Handling glass cuts (6)	Exposure to hot surfaces (6)	Handling glass cuts (5)

Energy update

British Glass has continued its work on advocating for the policy changes needed for the glass industry to remain competitive and to decarbonise. Working in conjunction with the Energy Intensive Users Group (EIUG) we have met with Minister Sarah Jones on two occasions as well as Secretary of State Jonathan Reynolds and Minister Michael Shanks to ensure that energy intensive industries (EIIs) get the policy needed.

Energy costs remain uncompetitive in the UK and British Glass continues to engage with the government to make it clear this must change if we want a competitive glass sector in the UK.

Positive steps taken in the last 12 months around energy policy:

- **The British Industry Supercharger scheme** came into effect in April 2024 increasing the exemptions from Renewable obligation (RO), Feed-in tariff (FIT) and Contract for differences (CfD) costs from 85% to 100%, and 60% network charge compensation which should be paid to members in May 2025.

  All large glass manufacturers benefited from the scheme with estimated savings of £24-29/MWh which is equivalent to £24-29m saving for our members from April 24 - April 25.

- **Progress towards an electrification** business model has been slow but positive. This model would address the price disparity between natural gas and electricity prices and allow further electrification.

  British Glass has been successful in applying to be part of the working group looking at the policy design and addressing the delays in getting a connection to the grid.

- **Ongoing advocacy continues.** We call for an increase for the Network Charging compensation to be increased from 60-90% along with other energy intensive users.



British Glass continues to engage with Ministers.

Areas of focus in 2025/26

- **A Review of Electricity Market Reform (REMA)** is underway with the possibility of zonal pricing, a change that could lead to an increase in electricity costs for certain zones in the UK.

  British Glass and the EIUG are following the policy development and encouraging the government to reduce the risk on EII sectors and if necessary, shielding the glass sector from any negative impacts the policy may have.

- **Gas Shippers Obligation** is currently being consulted on which looks to apply a levy to gas in the UK which could result in £0.20 - £0.40/MWh levy being applied from 2027.

  British Glass will be putting forward a case for the glass sector to be exempt from this proposed levy to ensure we remain competitive in terms of energy costs.

- We will continue to help shape the government's policy development to allow the UK glass sector to decarbonise via either electrification or hydrogen and to remain competitive.

Environment

Our focus this year has been the expansion of the UK Emissions Trading Scheme (UK ETS) and the planned introduction of a UK Carbon Border Adjustment Mechanism (CBAM) in 2027.

Following the announcement in 2023 that the UK would introduce a CBAM which would include glass products, British Glass responded to the consultation and continued our engagement with HM Treasury. Our main concern was the feasibility of including a complex sector such as glass within a CBAM by 2027, the scheme's effectiveness in protecting our sector from carbon leakage and the risk of circumvention. In December we welcomed the news that glass would be excluded from the initial phase.

We responded to nine consultations covering the future development of the UK ETS. The main consultation was on proposals to use UK-only data for the carbon leakage list which could have a significant impact if the proposals for tiering go ahead.

Other consultations included the expansion of the scheme to include the waste incineration and maritime sectors and integrate greenhouse gas and non-pipeline transport of carbon dioxide within the scheme as well as technical amendments to the scheme and the proposals to increase ETS subsistence fees for sites in receipt of free allowances.

We continue to push for the UK to link to the EU ETS to give UK manufacturers access to a larger market with more liquidity and the added advantage of being excluded from the EU CBAM.

In December, following one-to-one discussions with members, we published a progress update to the net zero strategy. Overall, the sector's carbon dioxide emissions per tonne of product produced have reduced since 2018. Our updated modelling showed that electricity is still the main route to decarbonise the sector.

Other areas of work this year included participation in the Climate Change Committee working group to develop the Seventh Carbon budget advice to the government. We have also been supporting members with issues around the measurement of emissions and have engaged with the external test house to ensure that there is a consistent approach to the glass sector.



Net zero progress update published in 2024.

Friends of Glass / PCG

Key activities for 2024

This year, we focused on expanding our outreach, strengthening engagement, and refining our strategies for the future. Through a mix of education, creative campaigns, influencer collaborations, and industry advocacy, we have successfully driven awareness and action around glass recycling and sustainability. From hands-on community engagement to high-impact social media initiatives, our efforts have reached diverse audiences, challenged misconceptions, and reinforced our commitment to a more sustainable future.

Our Glass Guardians programme has been a key part of our educational outreach, providing schools with worksheets, hands-on activities, interactive lesson plans, and competitions. This year, we recorded 638 total registrations and while the programme has played an important role in educating future generations about the benefits of glass recycling, going forward, we have decided to explore alternative programmes that allow us to better monitor engagement in the activities.

We took our message to the streets with a 3D art installation, engaging over 1,100 people in conversations about glass recycling. The initiative gained further traction through print coverage and an online reach of over 100,000. It also featured at the ESG, NCM15 – SGT conference. Given its success, we see creative, public-facing engagement as a key strategy to build on in the future.

Influencer collaborations played a significant role in broadening our reach. We ran six successful influencer campaigns covering health, food, reuse, and sustainability,





Above: This primary school created Christmas-themed creations for their school market.



The team in Leeds city centre.

Friends of Glass / PCG cont.

with competitions and content roundups proving particularly effective – especially those focused on reuse, such as gift ideas. Importantly, we made significant progress in reaching non-followers, a key objective that we will continue to develop. By trialling both micro and macro influencers, we gained valuable insights that will shape our 2025 strategy. Moving forward, we plan to work with more mainstream influencers who align with our values, helping us expand into new categories and connect with a wider audience.

To mark Earth Day, we used creative storytelling to showcase the evolution of the glass industry, imagining how it might look in 2050. The campaign featured a mix of formats, including spoof news reports, vox pops, and social media graphics (mock-up billboards), making it both entertaining and informative. Alongside this, our MythBusters campaign tackled common misconceptions around glass recycling through engaging social media content, further strengthening consumer understanding.

In addition to public engagement, we focused on policy influence and thought leadership. A lobbying video and written piece were created to set out our vision for the future of glass packaging and our route to net zero. To reinforce this, we published a thought leadership article by Jenni Richards, Principal Policy Advisor at British Glass, on LinkedIn, supporting the decarbonisation campaign and further explaining the British Glass vision.



Collaboration with Nancy Birtwhistle.

On a more local level, our Get Ready for Glass Leeds campaign combined public engagement with real-world impact. We supported the application of liveries onto waste management vehicles, ran a targeted social media campaign, and used the 3D art installation to engage directly with residents. The campaign achieved a large social reach and even gained local TV coverage, highlighting its effectiveness in driving awareness.

Looking at community engagement, this year's outreach efforts helped challenge perceptions and educate the public on glass recycling. Looking ahead, we plan to introduce an interactive poll to gather insights that will shape future campaigns. Press engagement was another success, with strong coverage across local print, online publications, and trade press, all reinforced through social media content.

Communications plan 2025/26

We have an exciting year ahead across British Glass and Friends of Glass, with campaigns focusing on the industry's decarbonisation efforts, tackling misconceptions around glass reuse, and promoting the many benefits of choosing glass for container packaging.

This spring we will launch our Glass Champions campaign – an opportunity to recognise and highlight brands, retailers, and independent groups that choose glass as their primary packaging, positioning it as a mark of excellence. The campaign will highlight the advantages of glass packaging, focusing on its benefits related to taste, health, and environmental sustainability, while raising awareness of products packaged in glass. Members will have the opportunity to nominate their clients, adding value to their customer relationships and rewarding customer loyalty, by recognising their commitment to glass while also providing them with a promotional tool.

Building on our position statement on glass packaging and reuse, we are developing a campaign that will cut across all audiences, aimed at debunking common myths and clarifying the distinctions between reuse and recycling. The campaign will highlight the environmental impact and benefits of both practices, providing clear, factual information that will hopefully encourage smarter, more sustainable choices. We are working with Toluna to create an online survey which will provide us with valuable consumer insights that will inform and shape our content.

Later in the year, we will be working on a campaign that positions glass as the superior material for craft beer. Breweries will be invited to participate, and collaborations will focus on the health and taste benefits of glass. We will explore an editorial collaboration to further expand visibility, while a series of case studies and interviews will highlight breweries that choose glass.

Continuing with our influencer programme, we will focus on health, food, and lifestyle to amplify our planned campaigns. The partnership with Kate Jones (@my_plastic_free_home) will be renewed to support the Glass Champions campaign, alongside a standalone activation highlighting the health benefits of glass. Additionally, we will be identifying new, more mainstream content creators, to expand our reach and engage a wider audience.

Finally, keeping British Glass at the forefront of industry discussions, we will also be ensuring visibility at key packaging events.



Our Glass champion campaign will kick off in Spring.

Recycling committee update

While last year's Recycling Committee work focused mainly on the Deposit Return Scheme (DRS), this year has seen a clear shift towards packaging Extended Producer Responsibility (pEPR). Despite this shift, DRS remains a key area due to its interaction with pEPR.

Extended Producer Responsibility (pEPR)

British Glass has consistently supported the principle of pEPR, which holds that those placing packaging on the market should cover the costs of its collection. However, when the initial fees were released in August, the high per-tonne fee assigned to glass came as a surprise. Despite subsequent refinements in September and December, these adjustments did little to ease concerns.

This issue stems from a fee calculation methodology that uses weight as a key metric, does not assign a fair value to collected glass, and uses uncertain figures for the amount of glass placed on the market. As a result, glass is liable for around 30% of pEPR costs, despite making up only around 5% of the in-scope material by volume. This leads to a significantly higher per-unit cost for glass compared to other materials. Our primary concern is that this imbalance may encourage brands to switch from glass to alternative materials to avoid the fees – something we have already seen evidence of. This situation is exacerbated by the delay of DRS, which creates a two-and-a-half-year window where in-scope DRS materials will be exempt from pEPR fees but will not contribute to DRS costs either.



Dr Nick Kirk discussed pEPR risks with GB News.

Political engagement

The General Election not only brought a change in government but also saw many new Members of Parliament representing glass sites. Our focus has been on ensuring these new MPs are properly briefed on both issues, meeting with them and conducting facility tours. Additionally, we have met with the new Recycling Minister, Mary Creagh, on two occasions, as well as with Ministers from the Department for Business and Trade, officials from the Department for Environment, Food, and Rural Affairs (DEFRA), and the Home Secretary, Yvette Cooper, whose constituency includes the three Knottingley glass sites. In each of these meetings, we have conveyed our concerns regarding pEPR. Sarah Champion MP has been a strong advocate on this matter and is seeking a Parliamentary debate on the impact of pEPR on the glass sector.

Recycling committee update cont.

Collaboration

We attended key events, including the Labour Party Conference, Packaging Innovations, and LARAC conferences, to engage with stakeholders and raise awareness of the issue. In addition, we have collaborated closely with organisations such as the Packaging Federation, the British Beer and Pub Association, brands and retailers, non-governmental organisations, trade unions, and others to build alliances and elevate the profile of the issue. As a result, many groups are now lobbying on our behalf, and we are no longer the lone voice we were when the fees were first introduced.



Glass policy lead Matthew speaking at Packaging Innovations.

Over the past year, we have also gained considerable media coverage, appearing in numerous magazines and newspapers, speaking on GB News, and commissioning an article for the House Magazine Select Committee guide, which is distributed to all MPs and Lords.

Reuse

Reuse is often presented as the solution to our concerns, as pEPR fees would only be paid once. We are eager to collaborate with the Government on reuse and have attended several meetings and workshops. However, we have also been highlighting the practical challenges of reuse, demonstrating that it is not a short-term solution to pEPR concerns.

Additionally, in November, the Welsh Government announced its intention to include glass in its DRS. We are in regular communication with them to discuss the practicalities of this, but it has also delayed the passing of DRS legislation. As a result, there should be no exemption for any materials from pEPR fees in Wales, and we are urging both the Welsh Government and DEFRA to address this issue.

Simpler recycling

The legislation on Simpler Recycling was announced and passed, and we contributed to consultations on the matter. While it represents a slight improvement over previous schemes, particularly with paper being collected separately nationwide, we believe it was a missed opportunity to go further—setting targets and ensuring that the funding Local Authorities receive from pEPR is used to enhance recycling services. We will continue to focus on these areas moving forward.

Technical container committee /Flat Glass committee

Technical container committee

British Glass published updated versions of technical documents TEC4, TEC 7 and TEC 9. TEC 5 was reviewed by the committee and reconfirmed for a further 5 years. The next review of the documents will be in 2030. They are available free of charge to British Glass members and can be requested via information services.

Following our success in securing an indefinite extension for the recognition of the reverse epsilon for placing measuring container bottles on the GB market the legislation to implement this came into force in October.

British Glass was represented on the BRCGS working group for Issue 7 of the Packaging Materials Global Standard. The updated standard was published in October 2024 and we have worked with BRCGS to update their Glass Guidelines for the standard which are expected to be published soon.

We continue to participate in the numerous working groups at Cetie. In addition to the usual working groups on container glass specifications and finishes, we are also active in the new groups on design for recycling and guidelines for reusable containers.

We continue to monitor developments at EU level which cover requirements for glass containers sold in the EU. The EU Packaging and Packaging Waste Regulation has been published, and we expect secondary legislation and guidance to be published on the requirements for the technical document to justify packaging weight. The revision of the EU Ceramics Directive is in progress, which will set EU harmonised limits for the migration of heavy metals from glass packaging.



Key technical documents were updated in 2024.

Flat glass committee

Over the past 12 months, we have produced a report on the inputs and outputs of flat glass in the UK to identify the opportunity to increase flat glass recycling

We have made good progress on the model of input and outputs and now need to verify our assumptions; we still have some gaps in terms of amounts of glass replacements in commercial buildings which we hope to consult with our members to enable us to get some credible assumptions.

We have also lobbied HM Treasury to remove glass from the lower rate or band glass to landfill, including meetings, letters and publication with an infographic aimed at decision-makers

We pulled together a letter and infographics in consultation with our flat glass members and sent them to decision-makers. We also met with treasury officials to discuss potential policy changes to help increase the amounts of flat glass available for recycling back into remelt. The meetings were positive although it's unlikely that any immediate changes are expected in the short term.

Publications

Over the last 12 months we have released a number of publications which can be viewed on our website.



Sustainability Impact Report 2025



Net Zero Progress Update 2024



Container glass technical documents
- TEC 7 & TEC 9

For more information or to view these publications, click the links on the images or visit britglass.org.uk



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