

Circularity, carbon neutrality and biodiversity: the virtuous path to a Nature Positive sector



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President

About NMWE

In a nutshell

- Not-for-profit association representing the European bottled water industry
- Founded in 2003 (successor to UNESEM, Paris, 1953)
- **KIG PR = one of the founding members**
- Membership base of national trade associations and companies (>550 bottlers)

Memberships – proud member of

- FoodDrink Europe (FDE)



- International Council of Bottled Water Associations (ICBWA)



NMWE members

National trade associations

- | | |
|--|--|
|  Austria |  Luxembourg |
|  Belgium |  Netherlands |
|  Bulgaria |  Poland |
|  Croatia |  Portugal |
|  Czechia |  Romania |
|  Denmark |  Serbia |
|  France |  Slovenia |
|  Georgia |  South Africa |
|  Germany |  Spain |
|  Greece |  Turkey |
|  Hungary |  UK (BDSA) |
|  Ireland |  Ukraine |
|  Italy | |

550 producers

EU associations

-  Watercoolers Europe

Bottling companies



ROMAQUA GROUP
BORSEC



Suppliers



Genossenschaft
Deutscher Brunnen eG

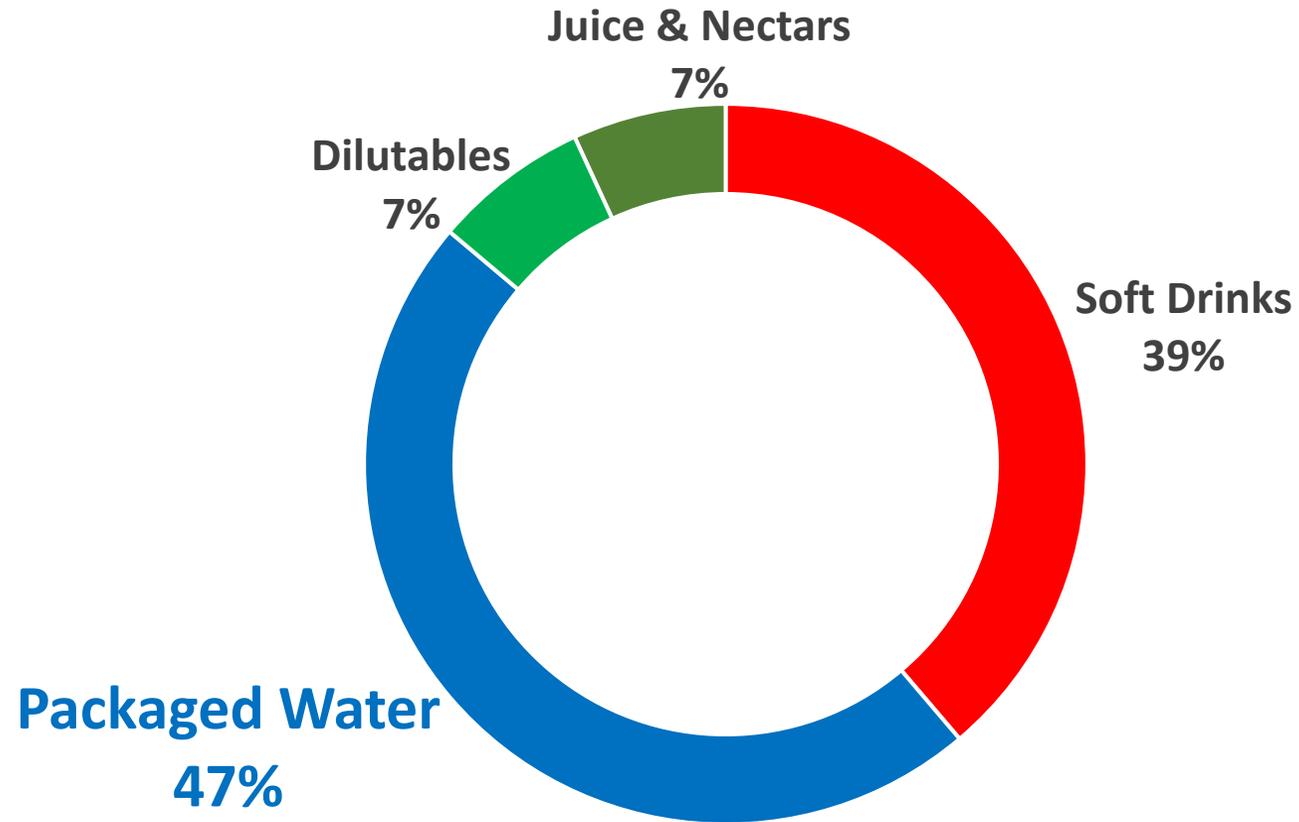


Oliver Rodés



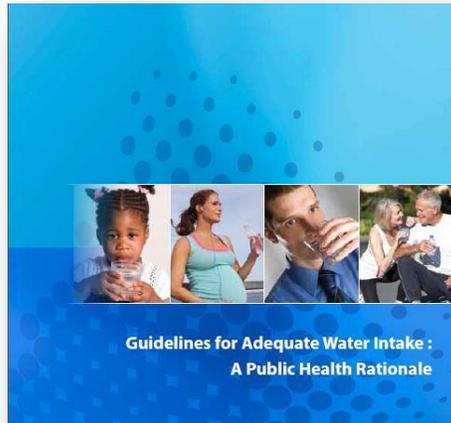
INSTITUT
FRESENIUS

EU non-alcoholic beverages 2021



Source: Global Data

Health aspects of natural mineral and spring waters - often forgotten relevance



- The natural choice for hydration
 - Zero calories
 - No sugar
 - No additives
- Essential part of the healthy diet
- Significant impact on obesity and diabetes prevention and treatment

Original purity goes hand in hand with source protection



...and source protection hand in hand with biodiversity



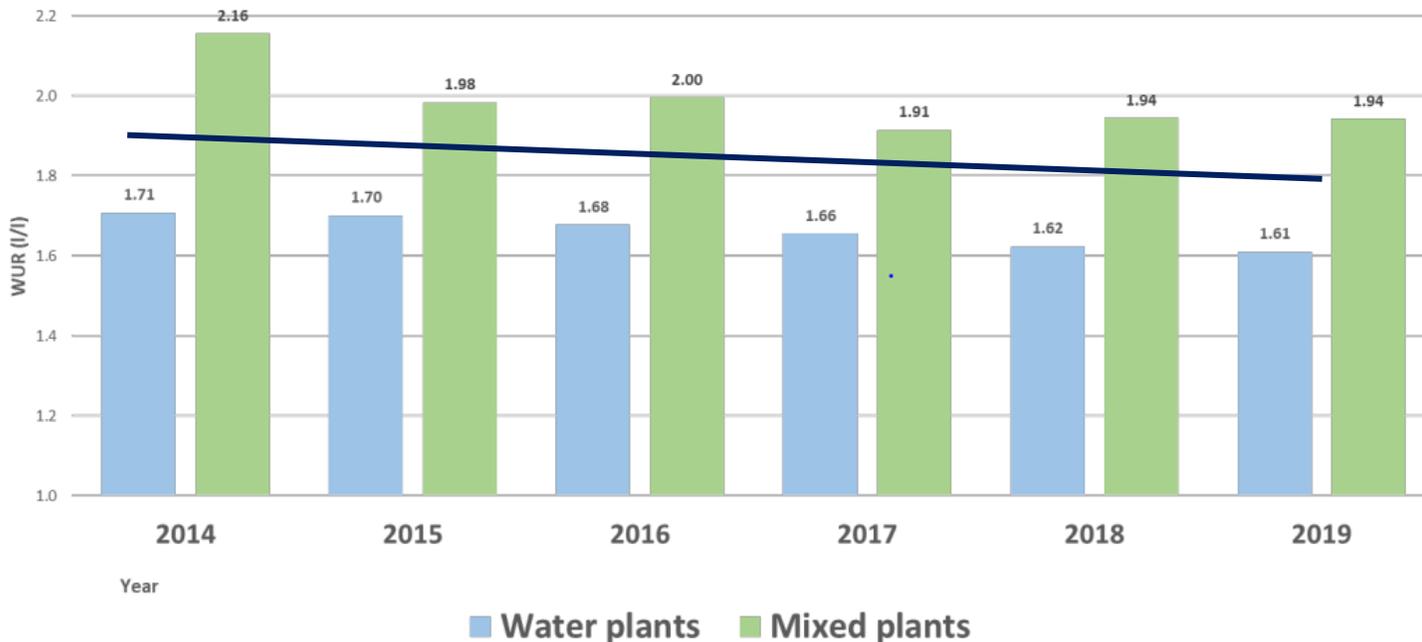
We want to go even further on biodiversity protection and restoration



- Collaboration with leading NGO on a biodiversity monitoring, strategy development and framework with a roadmap for water stewardship
 - To identify sectors biodiversity impacts
 - To propose meaningful types of interventions that could be implemented by members
 - To develop a framework and guidance on water stewardship

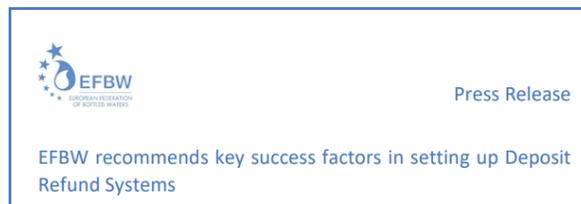
We are also highly efficient in water use

Water use ratio evolution in the sector 2014 - 2019



- Very low water use on factory level comparing to other sectors, including the beverage one
- The trend is still declining since 2014

Packaging in the spotlight



Voluntary commitments on collection and recycled content

May, 2018

Key success factors of DRS

July 2019

Priority access/material reuse

October 2021

July 2019

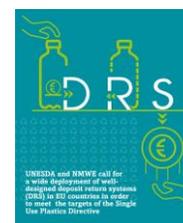
Endorsement of widespread DRS adoption



EFBW calls for improvements in plastic collection infrastructure

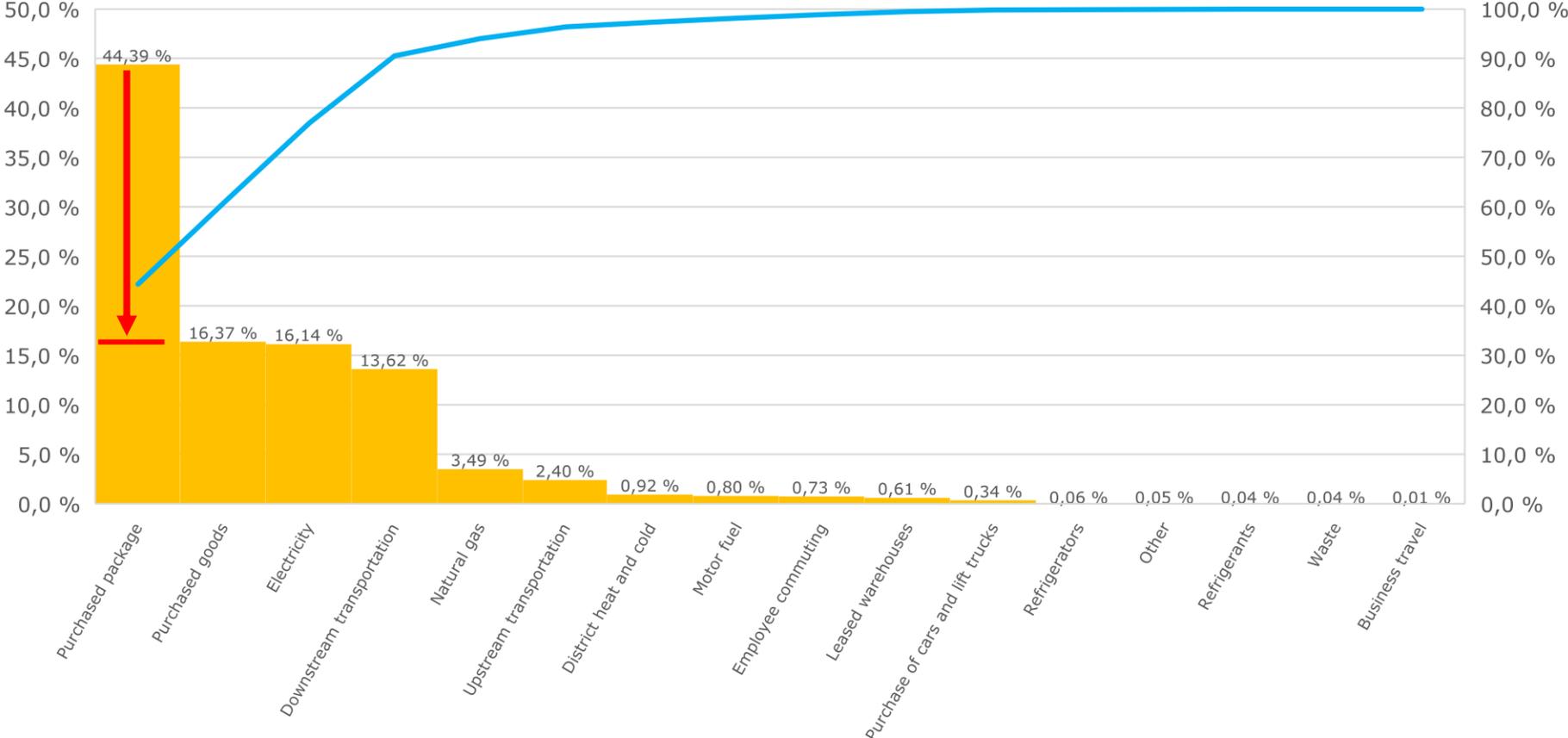
September 2020

Call for wide DRS deployment

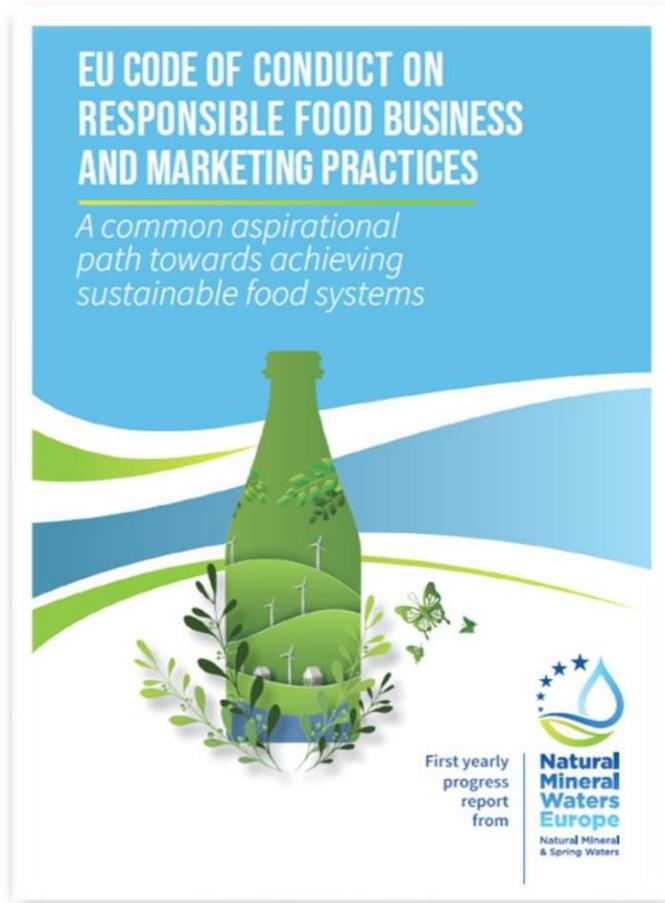


Through closing the packaging loop we will heavily decrease carbon footprint

Breakdown of carbon footprint of Mattoni 1873 in 2020



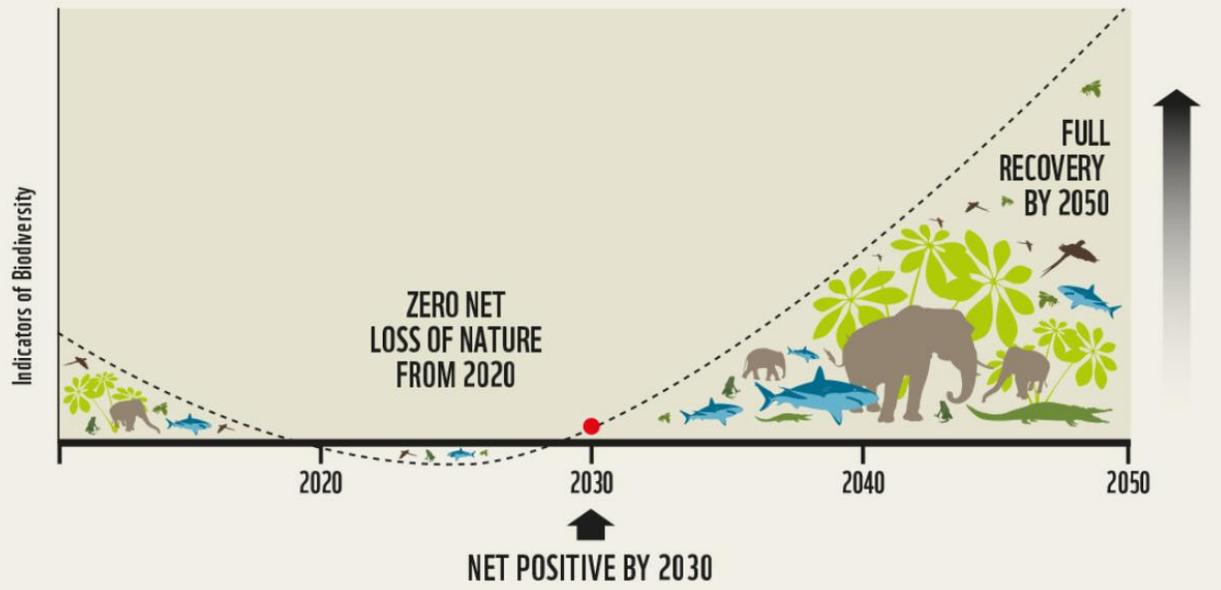
The EU Code of Conduct – sector commitments



- Decarbonisation
- Biodiversity
- Water efficiency
- Packaging circularity

We believe our sector can be Nature Positive

Global Goal for Nature: Nature Positive by 2030



Source: naturepositive.org

Nature loss and climate change are inseparably linked:

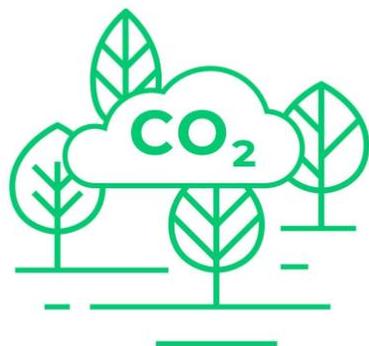
- it is not possible to achieve climate goals without addressing nature
- X
- to stop and reverse nature loss it is essential to address climate change

Climate change is a key driver of biodiversity loss

Our virtue steps towards Nature positive



Packaging Circularity



Carbon Neutrality



Biodiversity



Nature Positive Sector

Enablers needed



Biodiversity

- None



Carbon neutrality

- None



Packaging Circularity

- Deployment of DRS + minimum requirements in place
- Access to a fair quota of the recycled PET put on the market
- No more downcycling
- Reuse - where it makes environmental sense and to a level which does not compromise recycling

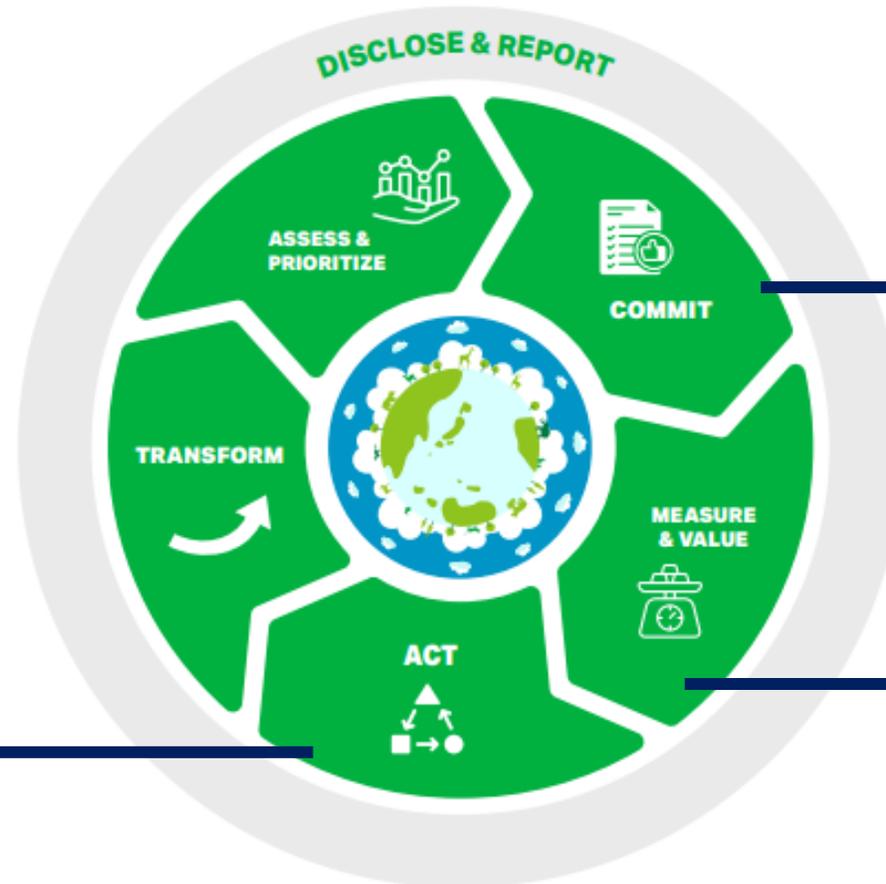
How far we are?



Biodiversity



Carbon neutrality



Packaging Circularity

<https://www.wbcsd.org/contentwbc/download/13439/196253/1>

Thank you

