



The case against Coca-Cola

How the world's biggest soft drinks company is failing to address ocean plastic pollution

GREENPEACE



The world's biggest soft drinks company is failing our oceans

Plastic bottles are choking our beaches, rivers and seas. According to global beach cleans, plastic bottles and lids are the most common plastic packaging found washed up on the world's shorelines.¹

This pollution isn't just unsightly; it wreaks havoc on our oceans. Bottles and lids are ingested by larger marine animals, like sharks and seabirds, and break down into microplastics, entering every level of the ocean food chain. There is also disturbing evidence to suggest that these microplastics act as sponges and absorb toxic chemicals from the ocean.²

Staggeringly, up to 12.7 million tonnes of plastic enter the ocean every year. That's a truckload of rubbish every minute.³ Given that nearly half of the 600 billion polyethylene terephthalate (PET) bottles manufactured annually are thrown away after a single use,⁴ plastic drinks bottles are a major part of the problem.

With production set to surge in the next few years,⁵ it's time for the soft drinks industry to take responsibility for the impact its products are having on the ocean.⁶

As the world's biggest soft drinks company, Coca-Cola bears a particular responsibility for the crisis our oceans are facing. Valued at over \$178 billion in 2015 and operating in over 200 countries,⁷ Coca-Cola has the means and influence across the sector to help end this flow of plastic pollution. Yet despite claiming to care about ocean plastics,⁸ Coca-Cola is hiding the scale of its plastic footprint and failing to take meaningful action to stop its products from polluting our seas.

Culpability for ocean plastics

How big is Coca-Cola's plastic footprint?

In a recent Greenpeace survey of the world's largest soft drinks corporations, Coca-Cola was the only company that wouldn't disclose the volume of plastic packaging it puts on the market annually. Coca-Cola said that this was 'commercially sensitive information' - even though all of its major competitors disclosed their data. It is possible to estimate Coca-Cola's plastic footprint by looking at annual sales figures of certain product lines and their proportion in the company's overall packaging mix since 2012. Using this method, we can estimate that Coca-Cola sells in the region of 108-128 billion plastic bottles per year.⁹

But we don't need to crunch the numbers to know that Coca-Cola has a major plastic footprint. The company sells more than 1.9 billion drinks servings around the world every day,¹⁰ and owns four of the world's top five carbonated soft drinks brands, plus 16 other billion-dollar product lines. With over 500 soft drinks brands on its books, the company sells more than 3,500 different products globally.¹¹



Our findings show that almost 60% of Coca-Cola's global packaging is single-use plastic bottles.¹² With a plastic footprint of this size, Coca-Cola needs to accept responsibility for the damage its products are causing to the marine environment.

No reduction targets for single-use plastic

Coca-Cola has no commitment, target or timeline to reduce the number of single-use plastic bottles it manufactures. Instead, the company points to its 'lightweighting' work – making bottles thinner to reduce costs, plastic use and carbon emissions.

But lightweighting does not prevent Coca-Cola's plastic bottles from entering the ocean and threatening marine life. Lightweighting is also happening in the context of the rapid expansion of plastic bottle production.

To truly combat marine plastic pollution, Coca-Cola must innovate beyond single-use plastic bottles.

Going backwards on reusable bottles

In several countries, companies sell soft drinks in returnable, reusable bottles. Deposit return schemes (DRS) are active in Germany, Sweden and Denmark, among others, where companies place a small charge on bottles at the point of

Alternatives to single-use plastic

Global momentum is building towards alternative delivery models and reusable packaging. The industry-endorsed Ellen MacArthur Foundation's New Plastics Economy initiative has called for at least 20% of all plastic packaging to be reused. Their 2017 report highlights the need to replace single-use plastic with reusable alternatives, and to design innovative packaging models based on product refills.¹³

One way soft drinks companies already do this is through soda fountains, most commonly seen in cinemas and fast food retailers. Coca-Cola told Greenpeace that in 2015, fountains accounted for a tenth of its global packaging mix, which includes the Freestyle soda fountain it launched in 2009.

Coca-Cola also needs to develop new vending technologies for domestic and on-the-go use. The company previously recognised that home delivery systems were a 'long term opportunity', but its 2015 home soda fountain was scrapped after just one year.¹⁴



Coca-Cola bottle collected from the Thames Estuary, UK. © Lovers / Greenpeace

purchase, which is then refunded when customers return their bottles. Returned glass bottles can be reused 50 times and plastic bottles 15 times.¹⁵ Soft drink Ale-8-One is sold in returnable bottles across the US, including in part through regional Coca-Cola distributors.¹⁶ In fact, Coca-Cola's own research into the UK's littering behaviour recommended that the company make more reusable packaging available.¹⁷

Yet Coca-Cola's annual sustainability reports, in combination with new data obtained by Greenpeace, reveal that the soft drinks giant has actually cut the proportion of reusable drinks containers sold over the past decade, with the proportion of refillable packaging falling from nearly a third of Coca-Cola's global portfolio to just a quarter between 2008 and 2015. In contrast, throwaway plastic bottles are on the rise, with a 12% increase in the proportion of PET used for packaging, versus a 33% decrease in refillable glass. This means that three-quarters (75%) of Coca-Cola's global packaging is now single-use material – including 58% single-use plastic bottles.

In 2015 Coca-Cola announced it would no longer provide its German customers with reusable PET plastic bottle formats for its half litre and 1.5 litre bottles. The only alternative is throwaway plastic bottles, despite advice from the German environment ministry on the potential for PET bottles to be reused multiple times.¹⁸

It's difficult to measure further backsliding because Coca-Cola is not transparent about its global packaging mix. The company no longer discloses the breakdown of refillable versus single-use packaging in its global annual reports,¹⁹ or on request. This is a far cry from the company's 2010 claim that 'a one-use bottle is simply not a viable option for our business.'²⁰

Compromising sustainability for short-term profits

Coca-Cola is always keen to emphasise the importance of recycling to its customers, but is failing to substantially increase the amount of recycled material it uses to make its own bottles globally. Indeed, Coca-Cola was happy to quantify the number of opportunities its customers have to interact with a 'recycling awareness message' since 2011, but the company refused to provide Greenpeace with a breakdown of how many tonnes of virgin plastic packaging versus recycled plastic packaging it sells globally each year.²¹

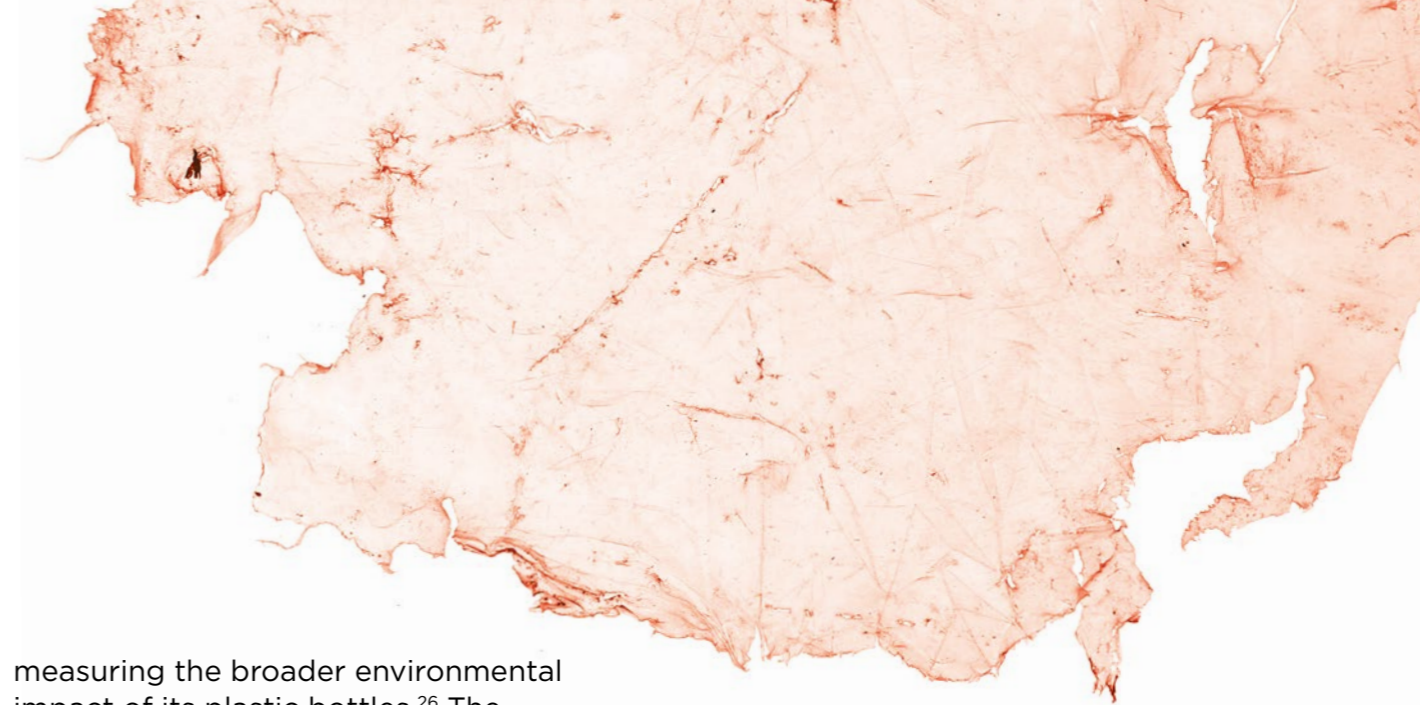
We do know that Coca-Cola got less than halfway towards its global 2015 target to source just 25% of its plastic bottles from recycled or 'renewable' material – reaching just 12.4%.²² This included the company using a measly 7% recycled plastic (rPET) content on average across its global product line. Coca-Cola blamed this shortcoming on the drop in oil prices reducing the cost of virgin plastic, which made rPET uptake a 'challenge'.²³

It seems that Coca-Cola is willing to compromise its sustainability commitments for its short-term profits. Earlier statements reinforce the priority of the company's economic motivations. Its 2012/13 sustainability reports reads: 'We remain committed to using rPET in our packaging, as it makes sense economically.'²⁴ Low oil prices and the fall in virgin plastic prices have had damaging consequences for recycling businesses, which, in the face of inconsistent demand for their product, have been forced to close plants.²⁵

After missing its 2015 global recycled content goal, Coca-Cola dropped this corporate target altogether, stating that it would track progress based purely on carbon reductions – rather than

100% recycled bottles are possible

100% recycled bottles are feasible and have been rolled out for a number of soft drinks products over the past decade. In 2007, Suntory's Ribena became the first major UK soft drink brand to use 100% recycled plastic. Then Naya Natural Spring Water started using 100% recycled plastic bottles in Canada in 2009, followed by PepsiCo's 7Up with 100% recycled 'EcoGreen' bottles in 2011. Hong Kong-based brand Watsons Water has offered customers 'Go Green' bottles since 2015 and Nestlé's Natural Spring Water began using 100% rPET bottles in the US in 2015. Coca-Cola owns over 90% of smoothie brand Innocent, which had pioneered a 100% recycled plastic bottle in 2007, but reduced recycled content levels in 2011, citing 'quality concerns'.



measuring the broader environmental impact of its plastic bottles.²⁶ The company now has no further global targets to boost recycled content across its entire product range, let alone a clear timeline for achieving 100% recycled content in Coca-Cola bottles. Coca-Cola's European arm does have a 2020 target to source a mere two-fifths of its plastic bottle material from recycled or 'renewable' sources. But while Coca-Cola has announced multi-billion dollar investments in emerging markets since 2011,²⁷ the company has made no commitment to introduce targets for increasing its use of recycled content in these countries, telling Greenpeace that any further goals are 'contingent on collecting baseline information'. The United Nations Environment Programme (UNEP) called this out in 2014, stating: 'It is notable that Coke has stalled on its binding recycled content goals for PET bottles, whilst some competitors have set binding targets.'²⁸

Renewable bioplastics won't protect our oceans

Coca-Cola's decision to combine its 'renewable' and recycled plastic goals for 2015 is also problematic. Merging these two goals distracts from the company's responsibility to reduce single-use plastic.

'Renewable' plastic, or bioplastic, uses plant-based plastic content, like Coca-Cola's 'PlantBottle'. Although using an alternative feedstock to fossil fuels can reduce carbon emissions in bottle

Slow progress

2015

Goal: 25% of plastic bottles sourced from recycled or renewable sources.

Outcome: Reached 12.4%, of which only 7% was recycled content.

2020

Goal: Recover and recycle the equivalent of 75% of the bottles and cans it sells in developed countries by 2020.

Current progress: Backsliding on this goal between 2013 and 2015.

production, using a plant-based bottle does nothing to end the blight of throwaway plastic entering the ocean, unless that bottle is recaptured and then reused or recycled after use. Scaling-up the production of single-use bioplastics also raises concerns about diverting greater swathes of land that could otherwise be used to grow food crops. While Greenpeace urges Coca-Cola to prioritise wholesale reduction of its plastic use through alternative distribution and reusable packaging, Coca-Cola's commitment to increase its use of 'renewable or recycled plastic' cannot be an either/or. Investment in the 'renewable' 'PlantBottle' should not distract from ensuring all of Coca-Cola's remaining plastic packaging is 100% recycled.

Lobbying to block solutions

'Fighting back' against the EU's circular economy package

Coca-Cola's website states: 'The benefits of the circular economy are plentiful, but the only way for it to work fully is for every company and person to join in.'²⁹ In contrast, its lobbying efforts have sought to undermine central pillars of circular economy legislation. Leaked internal documents from Spring 2016 revealed Coca-Cola's intention to resist elements of the European Union's circular economy package, listing the proposed policies of 'increased collection and recycling

targets', 'EU scheme for deposit systems', 'refillable quotas' and 'disruptive/unfair EPR [Extended Producer Responsibility] schemes' as four of the company's six priority targets for 'fight back'³⁰ (see image on page 8). The documents also revealed plans for an 'ongoing Coke-system lobby campaign' on the EU packaging waste directive.

In a leaked email, Coca-Cola staff described how the company is 'influencing final results' in European circular economy legislation 'by engaging in outreach and collaboration with industry associations.'³¹

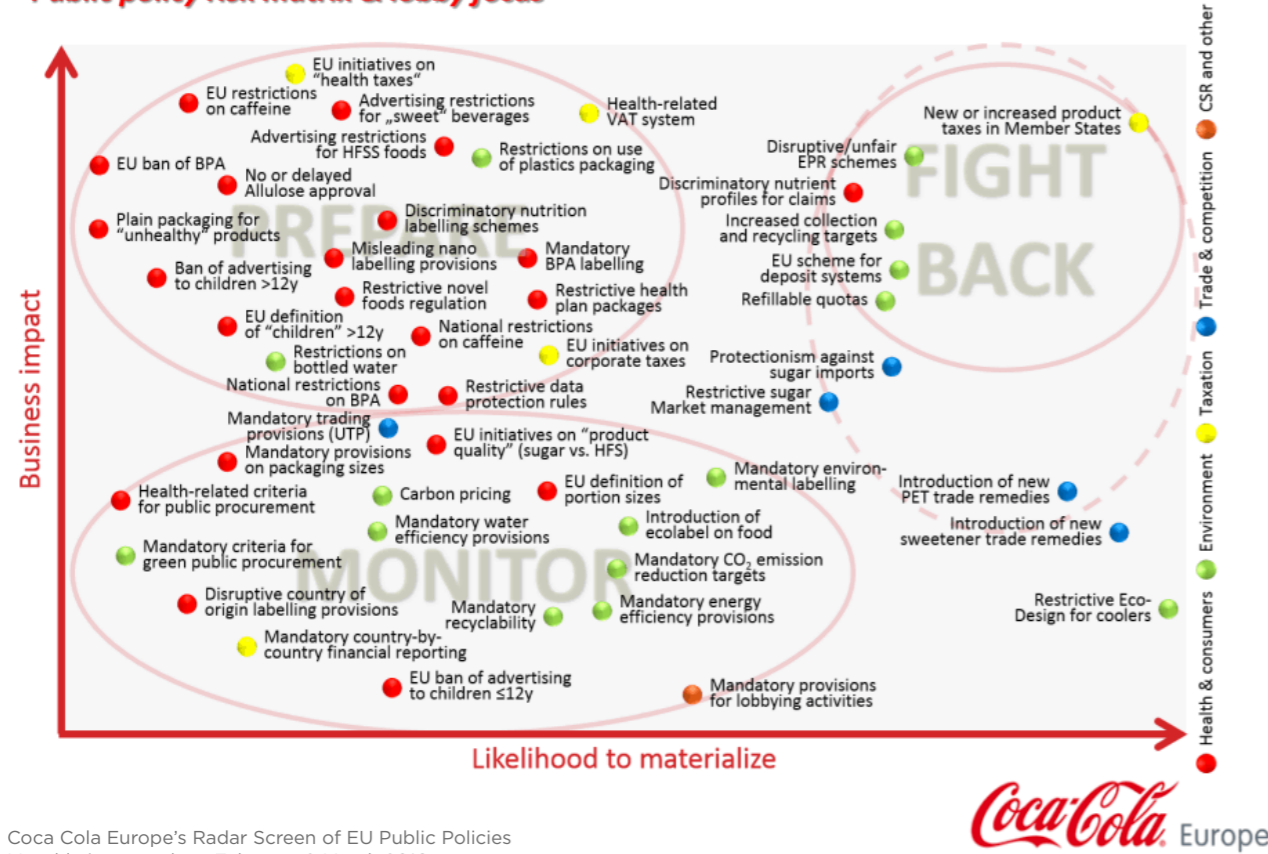
In fact, the EU transparency register shows Coca-Cola spent more than €900,000 lobbying the Commission in 2015, and namechecks the circular economy package as a core focus of lobbying activity.³²

but have consistently faced opposition from soft drinks companies keen to protect their short-term profits.

In Australia, Coca-Cola deployed a major public campaign against regional deposit schemes between 2009 and 2014. This campaign included litigation through the courts and Coca-Cola, alongside industry allies, spent nearly AUS\$20 million to block DRS rollout.³³ In the Netherlands it emerged that the sectoral body Coca-Cola belongs to, the Federatie Nederlandse Levensmiddelen Industrie, had funded an academic study that was used to lobby the Dutch environmental ministry in 2009 to abolish DRS for soft drinks bottles.³⁴ In Iowa, leaked internal emails from 2016 revealed that Coca-Cola fought to repeal a deposit scheme bill and replace it with a 'more comprehensive recycling and litter abatement program',³⁵ despite the proven successes of DRS across the world. Another email discussed Coca-Cola meeting with government officials in Quebec in an attempt to override plans by Montreal's mayor to ban bottled water.³⁶

A recent investigation by Greenpeace UK revealed that Coca-Cola had been lobbying against DRS in the UK for years up to 2017.³⁷

Public policy risk matrix & lobby focus



Coca Cola Europe's Radar Screen of EU Public Policies
Monthly issue update: February & March 2016

Lobbying against deposit return schemes

One of Coke's prime targets has been opposing the introduction of deposit return schemes (DRS) across the world. These schemes have boosted collection rates for drinks containers to over 95% in Germany, Norway and the Netherlands,

How deposit return schemes work





Coca-Cola's annual submission to the US Securities and Exchange Commission in 2015 warned that DRS in 'major markets in which we operate ... could affect our costs or require changes in our distribution model, which could reduce our net operating revenues and profitability.'³⁸ Yet the company operates successfully in multiple countries and regions where DRS are in place. Richard Lochhead, the former Scottish Cabinet Secretary who was lobbied by Coca-Cola, has said: 'I am puzzled as to why drinks companies that participate in successful deposit and return schemes in many markets around the world continue to resist new schemes being introduced in Scotland and elsewhere.'³⁹

But Coca-Cola doesn't like the public knowing about its opposition to DRS.

After Greenpeace exposed the company's lobbying efforts in the UK, Coca-Cola rapidly U-turned and announced its support of the introduction of a DRS in Scotland. A major factor in this decision was Coca-Cola's own consumer polling, which showed that 63% supported the introduction of a DRS and over half said it would make them more likely to recycle.⁴⁰

Absurdly, Coca-Cola invented bottle deposit systems in the early 1900s. Its glass bottles were too valuable to be single-use so the company introduced a refundable charge covering 80% of Coca-Cola's bottlers. This scheme led to 96% of bottles being returned and reused in the late 1940s.



A Coca-Cola ad from the 1940s showing retail and domestic reusable bottles © Dan H / Flickr

Hiding behind 'green' marketing

Coca-Cola spends \$4bn a year to market itself as a responsible, aspirational company — that's equal to the entire GDP of 27 countries.⁴² As sponsors of the Ocean Conservancy's annual International Coastal CleanUp,⁴³ Coca-Cola has publicly stated: 'Our packaging is among the debris that can be found improperly disposed of on shorelines around the world, so we have an obligation to help address marine litter in earnest.'⁴⁴ This is yet to translate into credible corporate action.

For example, through the Coca-Cola Foundation, the company has contributed sizeable investments in community recycling and anti-litter schemes, which keep the focus firmly on customer responsibility rather than the billions of throwaway plastic bottles being put on the market by the company each year. These go back to Coca-Cola's role as a founding member of Keep America Beautiful in the 1950s, an organisation that has been criticised for opposing government initiatives to reduce plastic pollution, including DRS, and diverting attention away from the role businesses could play in reducing single-use packaging.⁴⁵ Coca-Cola's continuing donations to Keep America Beautiful, including a community grant scheme for recycling bins, form part of its headline 2020 sustainability goal to recover and recycle the equivalent of 75% of the bottles and cans it sells in developed countries by 2020, of which the company numbers 36 countries.⁴⁶ However, analysis of Coca-Cola's sustainability reports show regression between 2013 and 2015, with the reported rate dropping from 63% to 59%.⁴⁷



A Greenpeace volunteer collects single-use plastic bottles from Sydney's Botany Bay © Greenpeace / Jane Castle



Furthermore, some of these initiatives are tied to commercial gain. The company's 2013 'Together We're Making Recycling Count' campaign offered UK customers a voucher towards Coca-Cola drinks as one of the rewards for making a recycling pledge online.

Incredibly, Coca-Cola presents itself as an 'active and supportive stakeholder in local deposit return systems'. In response to Greenpeace's soft drinks survey, Coca-Cola included deposit schemes in Estonia, France, Lithuania and Germany as company activity in the waste management sector.⁴⁸ The company told Greenpeace, 'The Coca-Cola system has been fundamental in the development of EPR [Extended Producer Responsibility] compliance schemes and deposit schemes across Europe', despite aggressively lobbying against deposit schemes around the world.

Through these statements, PR campaigns and sponsorship deals, Coca-Cola is seeking to position itself as an industry leader on this issue. Just recently, the company signed up to the Ellen MacArthur Foundation's New Plastics

Economy action plan at the World Economic Forum 2017, with Coca-Cola's Chief Sustainability Officer Bea Perez claiming that the company recognises it is time for 'a plastics system fully aligned with the circular economy. The market and environment demand it.'⁴⁹ The action plan set global goals to boost overall plastic packaging reduction, reuse and recycling rates, yet Coca-Cola has not clarified its global targets for plastic packaging reduction, reuse and recycling.

Coca-Cola claims: 'We are interested in innovations that deliver genuine, measurable long-term advancements toward sustainability and not just eye-grabbing marketing slogans that will earn us public relations points in the short-term.'⁵⁰ But the company's lack of credible action to reduce its own plastic footprint means Coca-Cola is doing just that. As Marion Nestle, long-term health advocate against the soda industry, notes: 'Corporate environmental philanthropy shifts attention away from the problems created by soda production and consumption and as much as possible transfers the burden of cleaning up environmental damage to the public.'⁵¹

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— Marion Nestle

Capacity to influence the sector

As the world's leading soft drinks company, Coca-Cola should take the lead in transforming the sector by investing in and developing new delivery systems, reusable models and ensuring all remaining packaging is 100% recycled. This shift away from single-use plastics would drastically reduce Coca-Cola's plastic footprint and have a huge impact on the overall amount of plastic flowing into the ocean every year.

Coca-Cola can also push the soft drinks sector and companies in its supply chain to reduce their plastic footprint. Greenpeace's survey of the top six global companies showed that many of the problems with Coca-Cola's plastic usage and policies are endemic across the industry.⁵² What's more, Coca-Cola has used its dominant position in the sector to lead in the development and use of new technologies in the past – for instance to tackle hydrofluorocarbons (HFCs) – a major driver of climate change. In 2004 Coca-Cola and Unilever spearheaded the 'Refrigerants, Naturally!' initiative, aiming to eliminate fluorinated gases from their cooling units. This high-profile push, supported by UNEP and Greenpeace, gained sign-on from PepsiCo and Red Bull, and is estimated to have saved the equivalent carbon emissions of 6.7 million passenger cars over one year.⁵³ Additionally, Coca-Cola is using its presence within the broader Consumer Goods Forum to help 400 consumer goods manufacturers and retailers shift to sustainable refrigerant technologies.

With gross profits of just under \$27bn in 2015, Coca-Cola has the means and influence to set ambitious sectoral standards for alternatives to throwaway plastic. If met, these standards would make significant gains in ending the flow of plastic into the oceans.



Solutions

Greenpeace is calling on Coca-Cola to accept its responsibility for ocean plastic pollution and commit to rapidly phase out the use of throwaway plastic packaging via the following steps:

1. Reduce and reuse

Prioritise reusable packaging and develop delivery systems based on reuse.

2. Recycle

Ensure all remaining packaging is made from 100% post-consumer recycled content, as well as being recyclable or compostable.

3. Disclose

Disclose the types and amount of plastic used, reused and recycled so that progress can be measured.

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End notes

¹ Ocean Conservancy (2016) International Coastal Clean-Up <http://www.oceanconservancy.org/our-work/international-coastal-cleanup/2016-ocean-trash-index.html>

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³ <http://science.sciencemag.org/content/347/6223/768>

⁴ PMMI & Euromonitor International (2015) Global Packaging Landscape: Growth, Trends & Innovations <http://www.pmmi.org/files/ResearchandTrends/Industry/Global-Packaging-Trends-ES.pdf> and The New Plastics Economy/Ellen MacArthur Foundation (2016) Rethinking the Future of Plastics https://www.ellenmacarthurfoundation.org/assets/downloads/EllenMacArthurFoundation_TheNewPlasticsEconomy_15-3-16.pdf

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⁶ Greenpeace (2017) Bottling It http://www.greenpeace.org.uk/sites/files/gpuk/Bottling-It_FINAL.pdf

⁷ Market capitalisation as of April 2015, stated in Marion Nestle (2015) Soda Politics

⁸ <http://www.coca-colacompany.com/coca-cola-unbottled/rolling-up-our-sleeves-and-pitching-in-to-eliminate-marine-waste-a-q-a-with-cokes-april-crow>

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¹⁰ <http://www.coca-colacompany.com/our-company/infographic-coca-cola-at-a-glance>

¹¹ Marion Nestle (2015)

¹² See 2014 Coca-Cola System Global Packaging Mix http://assets.coca-colacompany.com/f8/8a/a30682fa49ef9bef3d99d27bdf33/sustainability15_072315.pdf

¹³ Ellen MacArthur Foundation/New Plastics Economy (2017) Catalysing Action https://www.ellenmacarthurfoundation.org/assets/downloads/New-Plastics-Economy_Catalysing-Action_13-1-17.pdf

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¹⁵ <https://www.zerowasteurope.eu/tag/refilling-bottle/>

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¹⁷ <http://www.coca-cola.co.uk/stories/infographic-understanding-influences-on-litter-behaviour-amongst-young-adults>

¹⁸ <http://www.sueddeutsche.de/wirtschaft/getraenke-konzern-coca-cola-wendet-sich-von-mehrweg-flaschen-ab-1.2357141>

¹⁹ Data available in the following sustainability reports:

2008/09: https://www.coca-colacompany.com/content/dam/journey/us/en/private/fileassets/pdf/unknown/unknown/2008-2009_sustainability_review.pdf

2009/10: https://www.coca-cola.co.uk/content/dam/journey/gb/en/hidden/PDFs/2009-2010_The_Coca-Cola_Company_Sustainability_Review.pdf

2010/11: https://www.coca-cola.co.uk/content/dam/journey/gb/en/hidden/PDFs/TCCC_2010_2011_Sustainability_Report.pdf

2011/12: <http://www.coca-colacompany.com/press-center/press-releases/coca-cola-releases-2011-2012-global-sustainability-report>

2012/2013, 2013/2014, 2014/2015: <http://www.coca-colacompany.com/stories/sustainability-reports>

Not featured in 2015/16 report: <http://www.coca-colacompany.com/content/dam/journey/us/en/private/fileassets/pdf/2016/SR16-packaging.pdf>

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²⁷ See <http://www.coca-colacompany.com/press-center/press-releases/coca-cola-invests-big-in-india> and <http://www.coca-colacompany.com/press-center/press-releases/the-coca-cola-company-completes-transaction-with-ajman-industries> and <http://www.coca-colacompany.com/press-center/press-releases/coca-cola-announces-us-300-million-investment-for-strong-and-sustainable-growth-in-vietnam>

²⁸ UNEP (2014) Valuing Plastics: The Business Case for Measuring, Managing and Disclosing Plastic Use in the Consumer Goods Industry

²⁹ <http://www.coca-cola.co.uk/stories/what-is-the-circular-economy-and-why-does-it-matter-to-coca-cola>

³⁰ Coca-Cola Europe (February & March 2016) Radar Screen of EU Public Policies <https://www.documentcloud.org/documents/3409808-EU-Radar-Screen-Issue-Update-2016-02-03.html>

³¹ Coca-Cola Global Government Relations Dashboard – March 2016, released by DC Leaks http://dclears.com/emails/cApr/eml_download/Conversations_with_the_Coca-Cola_VP_Michael_Goltzman/00000118.EML – accessed 16 February 2017

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³³ Boomerang Alliance

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³⁵ http://dclears.com/emails/cApr/eml_download/Conversations_with_the_Coca-Cola_VP_Michael_Goltzman/00000141.EML – accessed 16 February 2017

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⁴⁷ <http://www.coca-colacompany.com/content/dam/journey/us/en/private/fileassets/pdf/2016/Scorecard-2020SustainabilityCommitments.pdf>

⁴⁸ Cited 'Estonian deposit organization' Estonia-EPP; France_Eco Emballage and Adelphi Germany were both listed as 'Deposit system'; and Lithuania's 'USAD, a deposit system established in 2016'

⁴⁹ <https://www.ellenmacarthurfoundation.org/news/in-support-of-the-new-plastics-economy>

⁵⁰ https://www.coca-cola.co.uk/content/dam/journey/gb/en/hidden/PDFs/TCCC_2010_2011_Sustainability_Report.pdf

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⁵² Greenpeace (2017) Bottling It

⁵³ <http://www.refrigerantsnaturally.com/reductions-and-benefits/>



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