Annual Impact Report 2024

newera

Foreward

2024 marked a pivotal year for the European reuse industry. For the first time in EU history, the Packaging and Packaging Waste Regulation (PPWR) established a comprehensive legislative framework for reuse and refill, introducing definitions, requirements, and binding targets for transport, grouped, and beverage packaging.

This regulatory milestone ignited a reuse momentum across the continent, and at New ERA we have been working hard to sustain that energy and translate it into measurable impact. This is precisely the goal of our first Annual Impact Report: to put concrete numbers behind the collective action of reuse stakeholders. This report therefore aims to shed light on the economic, environmental, and social indicators that best capture the footprint of our members. In doing so, we reaffirm our commitment to transparency, evidence, and cooperation.

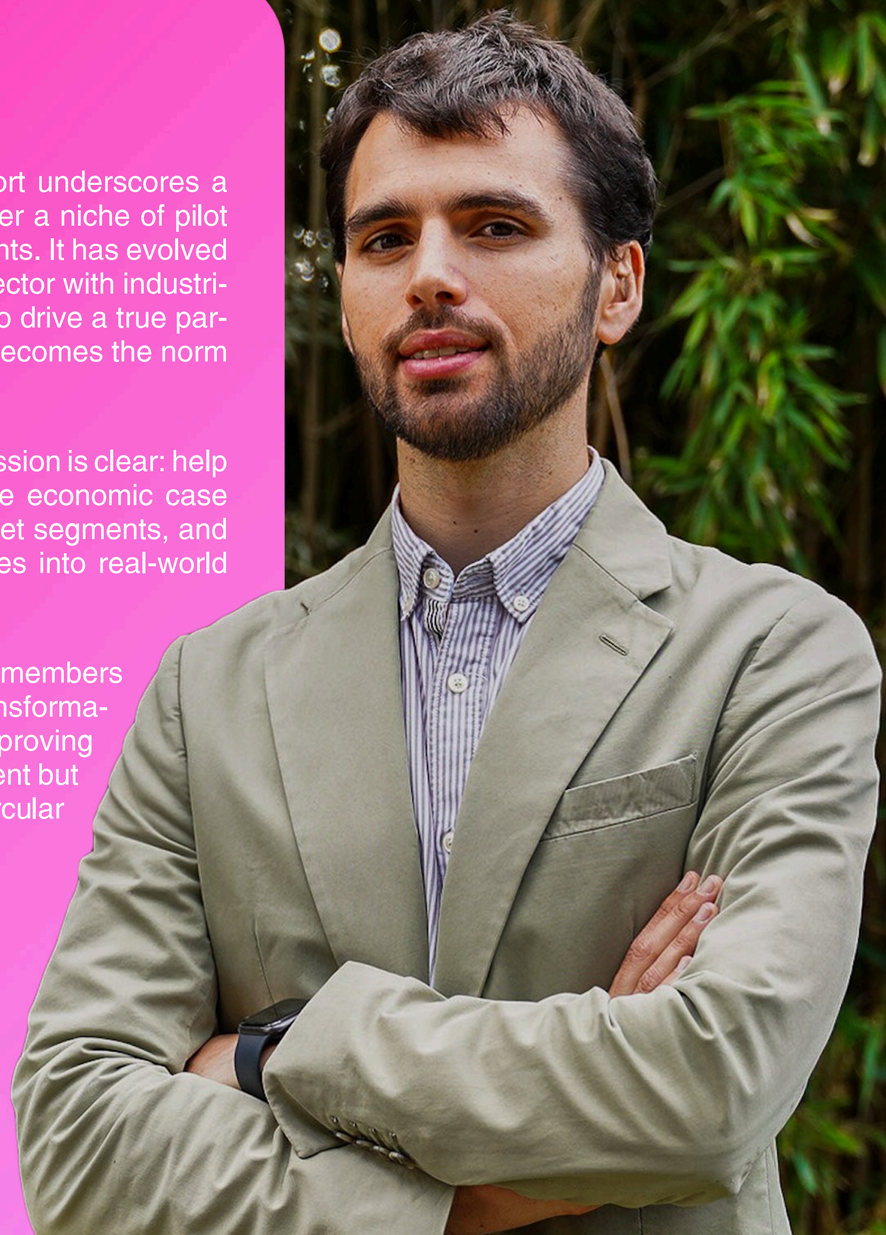
We closed 2024 with 73 members, up from 53 at the start of the year, a demonstration of the growing strength of our community. Our members vary widely in size, maturity, geographical presence and operational scope, which explains the granularity of the data collected and the uneasy task to reach general conclusions.

Beyond the numbers, the report underscores a broader truth: reuse is no longer a niche of pilot projects and isolated experiments. It has evolved into a dynamic, collaborative sector with industrial foundations strong enough to drive a true paradigm shift: one where reuse becomes the norm rather than the exception.

As we look toward 2026, our mission is clear: help to scale what works, prove the economic case for reuse across different market segments, and ensure that regulation translates into real-world implementation.

A heartfelt thank you to all our members and partners who make this transformation possible. Together, we are proving that reuse is not just a component but the backbone of Europe’s circular economy.

Fernando Rodriguez-Mata,
Director General



Key numbers

Who we represent

73 members

Headquarters in 14 countries

Operations in 27 countries

Economic insights

500 €
million
annual revenue generated by reuse activities

75%
of companies
generate revenues exclusively

Social & environmental impact

8,000
jobs
dedicated exclusively to reuse activities

92%
of members
measure environmental impact

Disclaimer

The data presented in this report is based on New ERA's internal member survey and reflects only the characteristics and activities of respondents. As such, figures may not capture the full composition of New ERA's entire membership.

About New ERA

The New European Reuse Alliance (New ERA) is the leading trade association representing businesses and organisations dedicated to advancing a circular economy by offering and promoting refillable and reusable packaging solutions.

New ERA represents companies across the entire packaging supply chain, from manufacturers to service providers, spanning key market segments such as takeaway, e-commerce, retail, and transport packaging, in both B2B and B2C contexts. As an umbrella organisation, New ERA also represents national and EU-level associations committed to advancing the reuse economy.

Its mission is to advocate for sound EU policies that will provide the economic conditions to unlock the full potential of well-designed reuse and refill systems.

New ERA contributes to the acceleration of the transition to reuse by fostering change across three key areas.

- **Shaping policy** by advocating for a regulatory framework that supports competitive and scalable reuse and refill systems.
- **Empowering reuse operators** by providing actionable insights, market intelligence, and practical tools to strengthen their business models.
- **Fostering collaboration** by facilitating knowledge exchange, sharing best practices, and promoting cross-border networking among stakeholders. Together, these efforts support the development of a connected and resilient reuse ecosystem across Europe.

Who we represent

01

Ownership

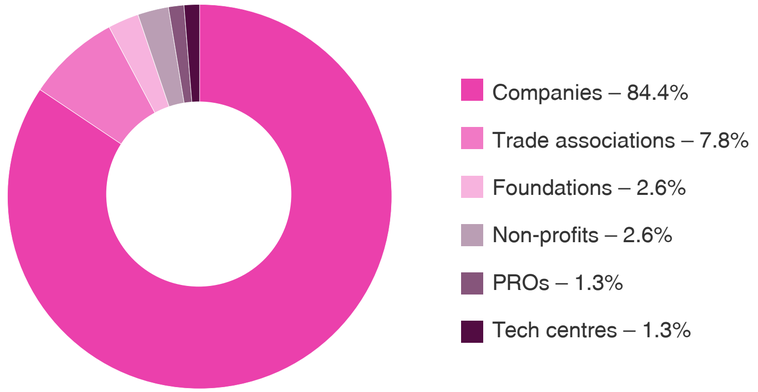
New ERA primarily represents private sector actors driving the reuse transition in Europe. The vast majority (84.4%) are **companies** developing and operating in reuse systems. The association's membership also includes **national and sectoral trade associations** (7.8%), **foundations** (2.6%), **non-profits** (2.6%), **producer responsibility organisations** (1.3%), and technological centres (1.3%), reflecting the sector's growing diversity and maturity.

Membership growth has been strong, reaching 73 members over the year 2024. This increase reflects the sector's expansion and the wider adoption of reuse business models in Europe.

Importantly, New ERA also supports the development of **national reuse associations** to help structure and strengthen the sector at country level. Its members already include established national associations in France, Germany, and Belgium, while New ERA has also supported the founding of Hergebruik Nu (Netherlands) and ES Reutiliza (Spain), with further initiatives underway.

This trend suggests an increasing need for structured collaboration and representation at national and international levels. In this context, New ERA's role as the voice of reuse businesses in Europe remains central.

DISTRIBUTION OF NEW ERA MEMBER TYPES



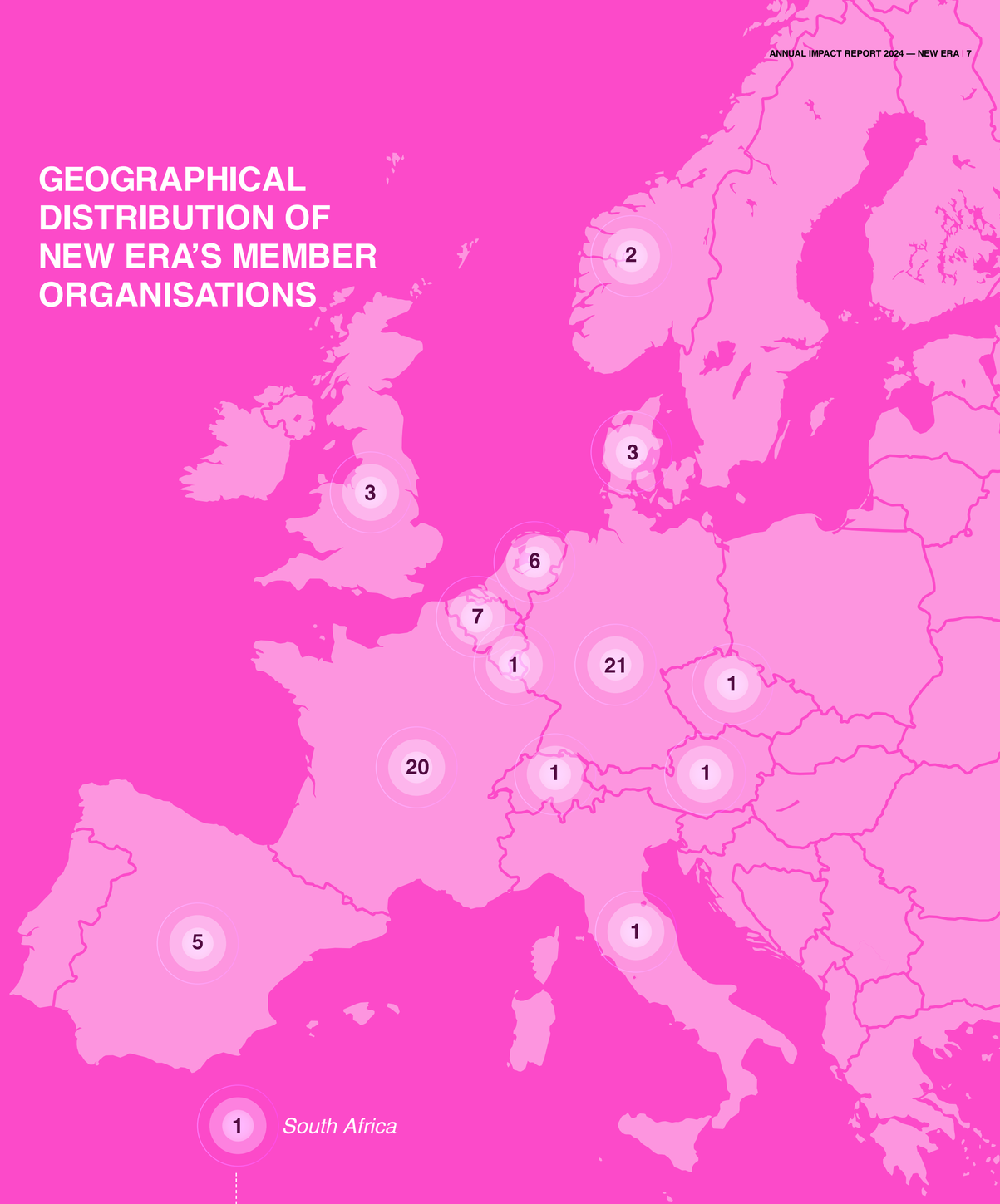
Geographical diversity

New ERA members are headquartered in **14 countries,** the vast majority of which are located within Europe. This reflects the European focus of the network, in line with its strategic orientation and policy engagement.

Germany and **France** are the most represented countries, respectively hosting 28% and 27% of New ERA's member organisations. They are followed by Belgium (9.5%), the Netherlands (8%) and Spain (7%). This concentration appears to correlate with the existence of national reuse-related legislation, such as the Anti Waste for a Circular Economy Law (AGEC) and the 3R Decree (reduction, reuse and recycling) in France, the Packaging Law (VerpackG) in Germany, and similar legislative developments in Spain, Belgium and the Netherlands. This pattern also highlights the limited presence of Eastern European countries in the network, which may reflect broader disparities in policy development and market maturity around reuse systems.

While the majority of members are headquartered in Europe, many operate internationally, with reuse activities spanning 27 countries overall, including Canada, the USA, South Africa, Australia, Brazil, and New Zealand. This suggests that reuse models developed in Europe are contributing to and engaging with global markets.

GEOGRAPHICAL DISTRIBUTION OF NEW ERA'S MEMBER ORGANISATIONS



Date of establishment

Reuse is not a new concept. Data shows that various New ERA members have been operating for decades, laying the groundwork for today's more visible and structured reuse economy. One-third of members were founded before the year 2000, including some with roots going back to the early 20th century.

At the same time, the sector is marked by a strong wave of new entrants: over 60% of member organisations were established in the last 15 years, with more than 25% being founded from 2020. This momentum reflects growing interest in reuse as a future-proof packaging solution and signals a shift in how businesses approach resource use and circularity.

The combination of long-standing expertise and fresh innovation is one of the sector's key strengths, bringing together operational know-how with new ideas, technologies, and business models.

Sectors

Packaging reuse systems are being applied across a wide range of sectors, with most New ERA members active in **more than one**. In total, organisations reported 115 sectoral engagements — an average of 1.5 sectors per organisation — highlighting a high degree of cross-sectoral versatility.

Retail (70.6%) and **hospitality** (66.7%) emerged as the two most represented sectors among New ERA members, followed by transport and industrial applications (47%) and e-commerce (41.2%).

This reflects the areas where reuse solutions are most visible to consumers and where regulatory drivers are strongest. However, it is important to note that this distribution reflects the profile of member organisations rather than the volume of the reuse industry activity. In practice, a significant share of reuse operations occurs in **B2B contexts** – particularly in the transport and logistics sectors – often represented through sectoral trade associations within New ERA's network.

PROFILES OF NEW ERA MEMBERS

Retail (70.6%)

Hospitality (66.7%)

Transport and industrial applications (47%)

E-commerce (41.2%).

Activities

New ERA members provide a broad range of activities along the reuse value chain, with an average of **2.8 activities per member**. This confirms the multi-functional nature of reuse actors and the diversity of expertise required to implement reuse systems at scale.

The most common activities include **traceability** (60.8%), **software and technology** (57%), **manufacturing** (51%), and **pooling** (51%). These are followed by collection (45%), cleaning and reconditioning (43%), design (37.3%), and research (23.5%). The prominence of manufacturing and digital services indicates a strong industrial and IT backbone within the reuse sector.

Overall, the activity breakdown shows that reuse is a complex, multi-step process. It involves various operations, from product design and logistics to digital infrastructure and washing expertise, underscoring the sector's depth and technical maturity and variety.

TRACEABILITY
60.8%

SOFTWARE AND TECHNOLOGY
57%

MANUFACTURING
51%

POOLING
51%

COLLECTION
45%

CLEANING AND RECONDITIONING
43%

DESIGN
37.3%

RESEARCH
23.5%

Economic insights

02

Revenue and profitability

Based on data reported by members, an estimated **500 million in annual revenue is generated through reuse activities.** Around 75% of members are “pure players”, focusing exclusively on reuse solutions, while the remainder are companies operating in both single-use and reuse markets. This mix reflects the sector’s ongoing evolution, encompassing both established businesses adapting their operations and new actors building reuse systems from the ground up.

Profitability is not yet widespread across the sector. In 2024, 44% of companies reported being profitable. However, data suggests a slow but steady trend toward financial viability. These figures point to a sector in development, with long-term economic potential emerging as business models mature.

Return on investment

The data indicate that return on investment (ROI) for reuse systems remains a long-term process. As of 2024, 55.3% of members reported not having achieved ROI yet. Among those who have, the timelines vary:

These figures reflect the capital-intensive nature of reuse systems, which often require significant upfront investment in infrastructure, logistics, and reconditioning operations. The time required to reach ROI underlines the importance of access to both public and private financing to support scaling and long-term viability.

Time companies need to achieve ROI

8.5%
saw ROI in less than one year

17%
between one and three years

8.5%
between four and six years

10.6%
after more than six years

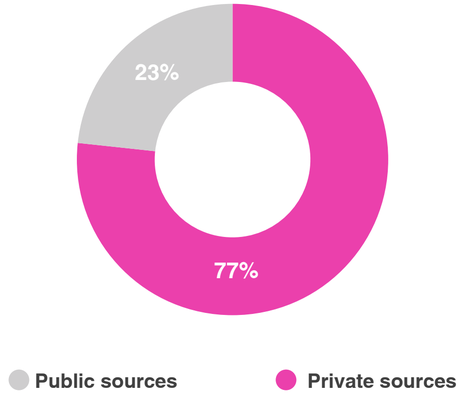
External funding

Access to external funding plays a significant role in enabling reuse businesses to launch and scale. 68% of organisations reported having received external funding.

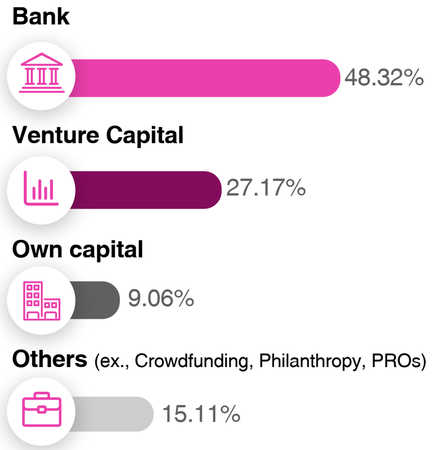
The funding landscape is diverse, reflecting a range of financial instruments and support mechanisms. **Public sources represent 23.3% of reported funding, while private investment** constitutes most of the share. Among private sources, banks (30.2%) and business angels (16.3%) are the most common, followed by venture capital, philanthropic contributions, crowdfunding, and Producer Responsibility Organisations (PROs), which together make up the remainder.

The range of funding types suggests that reuse businesses are tapping into both conventional and alternative finance to meet their capital needs. In this context, public-private partnerships and supportive public procurement frameworks can play an important role in accelerating the uptake and financial viability of reuse systems.

New ERA members



PRIVATE SOURCES ORIGIN



An engaged, impact-driven community

03

Research & innovation

Innovation plays a central role in the development of reuse systems. Among the members surveyed, **76% report active investment in research and development** (R&D), allocating on average 30% of their budgets to this area. This indicates a strong commitment to improving materials, technologies, logistics, and user experience.

On average, over 15% of employees within member organisations hold roles related to research and innovation. This suggests that R&D is not only a budget line, but a structural component of reuse business models.

Together, these figures highlight the innovation-driven nature of the sector, where continuous improvement is essential to overcome operational challenges and scale solutions effectively.

76% of the members

Active investmet in research and development

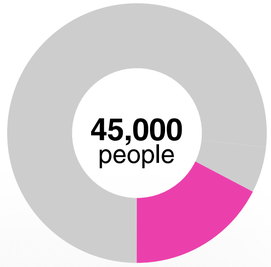
≈30% of their budgets invested in R&D

Social impact

According to the data provided, New ERA represents organisations employing approximately 45,000 people. While their activities extend beyond reuse alone, reuse-related operations are deeply integrated across various business functions - including logistics, cleaning and maintenance, product design, technology development, and customer service. A more detailed analysis of the data shows that nearly **8,000 employees work exclusively in reuse-related roles** within the surveyed companies.

New ERA represents

Organisations employing approximately



8,000

employees work exclusively in reuse-related roles

Environmental Impact

Sustainability is a central focus for reuse businesses, with **92% of New ERA members actively assessing their environmental impact.** The most commonly monitored indicators include waste reduction, carbon footprint, and single-use packaging avoided, evaluated by around two-thirds of companies, and water usage (45%), tracked by almost half of companies.

Many members' sustainability efforts also extend to the conscious selection of materials: over half incorporate recycled content into their packaging. End-of-life management is another key aspect of environmental impact, with more than 80% of reusable packaging manufactured by New ERA members ultimately recycled once it reaches the end of its lifecycle.

These efforts reflect a shared commitment to making reuse not only viable but also environmentally meaningful. As the sector continues to grow, the ability to quantify and demonstrate environmental performance will be essential in building trust with policymakers, investors, and the public.

92% **of New ERA members**
actively assessing their environmental impact.

↓ The most commonly monitored indicators include

- **Waste reduction**
- **Carbon footprint**
- **Water usage**
- **Single-use packaging**

Annexe: sectors and activities definition

04

Sectors

E-commerce: reusable packaging used to deliver products sold online or through other remote sales channels to the consumer.

Hospitality: reusable packaging used for businesses that provide services related to hotels, restaurants (including takeaway and delivery), bars, events, canteens, theme parks, and recreational facilities.

Retail: reusable packaging used for the sale of packaged goods, such as food, beverages, cosmetics, and home and personal care products, to consumers at the point of sale

Transport & Industrial: reusable packaging specifically designed to facilitate the handling, transportation, and storage of goods in B2B setting, including primary, secondary, and tertiary packaging.

Activities

Collection: Management or provision of infrastructure for collecting and processing used containers through bins, staffed locations, or automated machines. This includes designing, producing, and coordinating the systems for collection, transport, and recovery.

Cleaning and reconditioning: The process of sanitising reusable packaging with water to remove bacteria and other contaminants, or repairing containers or equipment to make them suitable for reuse or redistribution.

Certification: The process of verifying that a product or service meets the requirements set by an officially adopted standard, regulation, or recognised guidelines.

Design: The process of developing the material and visual elements of reusable packaging to ensure both aesthetic appeal and functional effectiveness.

Labelling: The process of designing, manufacturing, attaching, printing, or marking an aesthetic wrapper or seal on a reusable packaging through serving to display product information while also acting as a tool for marketing and brand differentiation.

Manufacturing: The process of producing reusable packaging and equipment such as washing lines or reverse vending machines, used in reuse and refill systems.

Pooling: A managed network where reusable packaging items are shared, collected, cleaned, and reused across supply chains and users. These systems rely on centralised coordination, reverse logistics, and standardised packaging to ensure efficient reuse.

Research: Carrying out systematic activities aimed at studying subjects in detail to achieve deeper understanding. This can also include conducting lab tests and lifecycle assessments.

Representation: Acting on behalf of a group of organisations to advocate for their interests at regional, national, or sector-specific levels.

Software & Technology: Development of digital platforms to track, manage, and facilitate the movement of reusable assets within a supply chain. These platforms optimise logistics through software, ensuring efficient management and return of reusable containers. In some cases, these technologies also manage coordination with end-users, addressing the challenges of final-stage interactions addressing both B2B and B2C logistics.

Traceability: The ability to track the location of reusable packaging using data carriers such as barcodes, QR codes, RFID tags for automatic identification and data capture, or digital twins.

Credits

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Data contributors
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New ERA-New European Reuse Alliance