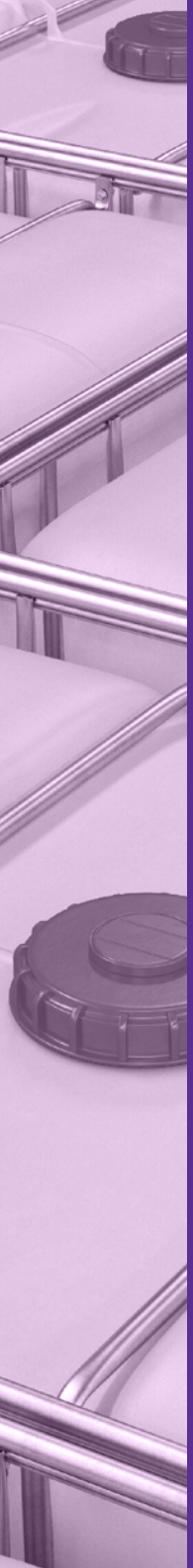

BELGIUM REUSE

BAROMETER

2025 EDITION

In association with:

CONSOMaction

Fostplus

A part of:

EUROPEAN REUSE BAROMETER

ACKNOWLEDGEMENT

The Belgium Reuse Barometer was made possible thanks to the active participation of companies in the reusable packaging sector, whom we warmly thank for the time dedicated to completing the survey and for the richness of their qualitative contributions. Their engagement and insights enabled the establishment of a detailed and nuanced overview of the development of reusable packaging in Belgium.

We extend our deepest gratitude to Fost Plus, whose support and trust made this report possible. By supporting Zero Waste Europe, New ERA, and Planet Reuse to develop the study, Fost Plus played a decisive role in enabling this pioneering effort to map and analyse the Belgian reusable packaging ecosystem.

We also wish to sincerely thank ConsomAction, the European Reuse Barometer's national partner for Belgium, for its crucial role in disseminating the survey across its network and for providing valuable insights into Belgium's reuse legislation. Without its engagement, the quality, reach, and representativeness of this Barometer would not have been achieved.

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FUNDERS AND NATIONAL PARTNERS

By supporting the first Belgium Reuse Barometer, Fost Plus made this study possible, demonstrating its commitment to supporting innovation and accelerating the transition toward reusable packaging models.

Since 1994, Fost Plus has been accelerating the transition to sustainable packaging management. The citizen is central is an approach that avoids resources becoming waste. To this end, Fost Plus is setting up efficient structures to sort correctly any time, anywhere, is improving packaging design with approx. 5,000 members with a view to better recycling and is rethinking the way we all handle (packaging) materials.

Fost Plus works closely with citizens, businesses, public authorities and experts to collect and recycle the household packaging put on the market by its members. In this way, the organisation fulfills the Extended Producer Responsibility of its members. 60 dedicated colleagues are committed to influencing consumers' behaviour so as to minimise the impact of our way of producing and consuming on the environment. By building sustainable material chains, Fost Plus contributes to a better society and a cleaner world for all.

Learn more at: fostplus.be

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As the European Reuse Barometer's national partner for Belgium, ConsomAction plays a key role in strengthening the Barometer's quality and relevance at country level. It helps ensure broad participation from Belgian reuse companies by disseminating the survey through its networks.

ConsomAction is a non-profit organisation committed to responsible, fair, and sustainable consumption. It supports citizens, companies, and public authorities in their transition towards practices that are more respectful of the environment, health, and collective well-being.

Through awareness-raising, training, advisory activities, and the publication of practical guides, ConsomAction empowers consumers to make informed choices and to actively participate in shaping a more just and well-regulated economic system.

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Through its funding Verpact made this report possible, demonstrating their commitment to supporting innovation and accelerating the transition toward reusable packaging models.

Non-profit organisation founded in 2023 through the merger of Afvalfonds Verpakkingen, Nedvang, and KIDV. Verpact is the Extended Producer Responsibility (EPR) organisation for packaging waste in the Netherlands and as such brings together companies, governments, and recyclers to accelerate the transition toward a circular economy for packaging. The organisation coordinates the collection, recycling, and prevention of packaging waste while supporting businesses in meeting their EPR obligations.

Learn more at: verpact.nl

STRATEGIC PARTNERS

Zero Waste Europe, New ERA, and Planet Reuse form the steering committee of the Reuse Barometer. They co-design the project's direction, shaping its goals, methodology, and overall scope. They provide high-level guidance on priorities such as sector focus, indicators, and analytical framing, ensuring that the Barometer remains aligned with the broader European reuse agenda. These organizations also contribute to the partial financing of the project.

Zero Waste Europe (ZWE) is the European network of communities, local leaders, experts, and change agents working towards a better use of resources and the elimination of waste in our society. They advocate for sustainable systems, for the redesign of our relationship with resources, and for a global shift towards environmental justice — accelerating a just transition towards zero waste for the benefit of people and the planet.

Learn more at: zerowasteeurope.eu

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Zero Waste Europe gratefully acknowledges financial assistance from the European Union.

The funder cannot be held responsible for any use that may be made of the information contained herein.

The New European Reuse Alliance (New ERA) is the leading European trade association representing companies offering reusable and refillable packaging solutions across the entire packaging value chain — from manufacturers to service providers.

It covers multiple market segments including takeaway, e-commerce, retail, and transport packaging, addressing both B2B and B2C contexts.

Its mission is to advocate for strong European policies that create the economic conditions necessary to unlock the full potential of reuse and refill systems.

Learn more at: newreusealliance.eu

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Planet Reuse is the first European online platform and network bringing together professionals to connect, learn, and collaborate on the topic of reuse and reusable packaging. Its vision is to accelerate the transition from linear to circular distribution models across European countries, preventing packaging from becoming waste in the first place.

Launched in September 2022, the platform now brings together over 1,400 members from more than 850 organisations.

Learn more at: planetreuse.eu

Contact us at: info@planetreuse.eu

PROJECT LEAD

InOff Plastic acts as the operational lead of the European Reuse Barometer, responsible for project management, survey design, data collection, and analysis. As the project's independent research team, it coordinates all partners, ensures methodological consistency, and safeguards the integrity and objectivity of the findings.

InOff Plastic is a consulting firm specialised in reducing single-use packaging. The company supports clients in defining their packaging strategy and in designing and implementing reuse or bulk sales models adapted to their operations.

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EXECUTIVE SUMMARY

The Belgian reuse sector stands at a pivotal moment. While many newer companies are actively investing in logistics, technology, and circular delivery models, Belgium is not starting from zero. On the contrary, Reloop data show that since the early 2000s Belgium has consistently ranked among the European countries with the highest per-capita unit sales of refillable beverage containers, reflecting a long-standing culture and infrastructure of reuse **(Reloop)**. In 2024, 43% of household packaging placed on the market (by weight) was reusable, nearly all in the beverage segment **(Fost Plus)**. At the industrial level, Valipac reports that 83% of commercial and industrial packaging placed on the Belgian market is reusable—and 92% when excluding cardboard, highlighting that reuse is already the dominant model in B2B logistics **(Valipac)**.

Consumer attitudes also reflect this embedded culture: while enthusiasm for reuse is still emerging across product categories, Belgian consumers broadly understand the principle of reuse and are open to adopting it, especially when convenience is guaranteed **(Fost Plus)**. Home sorting is already a widely adopted routine, and returning reusable beverage packaging is a familiar habit for many Belgians—even if newer systems like take-away or e-commerce reuse have yet to reach mainstream levels. This existing acceptance provides a favorable entry point for broadening reuse beyond beverages.

Finally, the 2025 Barometer set out to monitor both household and industrial reuse. While this edition's findings mostly reflect household packaging systems—owing to a higher response rate from that segment—the industrial data will remain a key focus for future editions.

WHY REUSE MATTERS

Reusable packaging is central to a circular economy, tackling waste at its source by keeping materials in use for multiple cycles. It cuts resource consumption, emissions, and waste generation while enhancing economic resilience against material and energy volatility. Scaling reuse across sectors is essential to meet Europe's waste-prevention and climate goals and to move from disposable convenience to durable, resource-efficient systems.

MARKET READINESS AND KEY BARRIERS

However, the findings of this barometer reveal a structural mismatch between demand and industrial capacity. Large, fully operational reuse systems often struggle to find enough demand to achieve cost-effectiveness, while sectors with strong reuse potential—such as restaurants, catering services where the same consumers return every day and packaging circulates within a closed, predictable environment—still remain largely untapped or served by smaller operators unable to reach profitability. The result is a circular standstill: infrastructure exists, but demand lags; and without visible demand, investment in new capacity remains limited.

Companies' main challenges are consistent across sectors:

1. **Consumer adoption –** While Belgium has a long-standing culture of returning reusable beverage packaging, newer reuse innovations—such as take-away, or e-commerce—are still far from mainstream. Several companies note that infrastructure is ready, but consumer demand remains limited and often driven by short-term awareness campaigns rather than sustained purchasing habits. Strengthening consumer engagement and convenience is critical to unlock consistent demand.
2. **Supply chain integration and cost competitiveness –** Belgium's long-established beverage reuse system demonstrates that reuse can be cost-competitive when infrastructure and scale are in place. However, as Reloop highlights, decades of market shift toward single-use dismantled refillable infrastructure in most countries, which explains why newer reuse systems in retail, hospitality and e-commerce still tend to cost more than the single-use alternatives available today. Achieving comparable levels of costs efficiency and convenience for these emerging systems will depend on rebuilding shared return networks, expanding cleaning capacity and advancing packaging and process standardisation.

Together, these insights show that reuse solutions are technically mature, but market alignment and infrastructure cohesion lag behind. Companies are ready to expand, yet scaling will require stronger consumer engagement, supportive regulation, and investment in shared systems.

POLICY AND COLLABORATION: THE PATH TO SCALE

At the policy level, legislation remains the most critical missing piece. It is the top form of support requested by surveyed companies, followed closely by enforcement. Yet both the national and european regulatory frameworks are perceived as neutral at best—insufficient for a sector that depends on clear direction and long-term predictability. This perception reflects the views of respondents and may not fully capture recent policy developments. Belgium already offers tax incentives for refillable beverage containers and, since 2025, a fiscal deduction of up to 40% for investments in reusable packaging infrastructure **(VLAIO)**. While these measures support sector development, companies still express uncertainty—particularly around the implementation of the Packaging and Packaging Waste Regulation (PPWR) across Member States. Strengthened, clarified, and enforced regulation could provide the business confidence and investment visibility needed to achieve 2030 reuse objectives.

In parallel, collaboration emerges as a defining success factor. The most resilient companies such as the ones operating in transport packaging have built ecosystems of partners—including suppliers,

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logistics providers, cleaning services, and digital tracking firms—that allow them to share costs and optimise existing infrastructure. The high reuse rates reported by Valipac in the commercial and industrial sector and cited earlier come from systems that rely heavily on strategic partnerships and shared logistics to ensure high rotation and minimal waste. Broader sectoral coordination, potentially through an industry association or multi-stakeholder platform, could amplify these synergies and accelerate standardisation of containers and systems.

With most surveyed companies expecting to reach profitability within one to three years, and several large operators already poised for growth, the next few years will be decisive. Acting now will determine whether reuse models move beyond early adopters toward full market viability—or remain stalled below their potential.

CALL TO ACTION

- **Policymakers:** Provide clear, ambitious, and enforceable legislation that gives reuse a long-term structural advantage over single use. Ensure rapid clarification and implementation of the PPWR to enable planning toward 2030 targets.
- **Companies using single-use packaging:** Begin transitioning to reusable models now. Early engagement will not only reduce compliance risks but also position companies as leaders in an inevitable market shift.
- **Industry actors:** Collaborate, standardise, and share infrastructure. Building common logistics and cleaning networks will reduce costs and accelerate adoption across the value chain.

Belgium's reuse sector is ready. What it needs now is a clear signal—from regulation, markets, and consumers alike—that reuse is not just an alternative, but the new standard.

INTRODUCTION

CONTEXT AND PURPOSE OF THE BAROMETER

The Belgium Reuse Barometer is the country's first national benchmark dedicated to reusable packaging systems. Inspired by the European Reuse Barometer launched in 2024, it aims to document, quantify and support the transition toward reusable packaging across all key sectors: food and beverages, retail, logistics, e-commerce, hospitality, and B2B transport.

This report establishes a baseline for the Belgian reuse ecosystem. It identifies the main actors, evaluates the level of maturity and readiness of the sector, and highlights opportunities and barriers to scaling reuse. By mapping initiatives and industrial capacities, the Barometer seeks to provide data-driven evidence to policymakers, investors and companies committed to reducing single-use packaging and accelerating circularity.

Conducted under the coordination of Belgian and European partners, the Barometer combines quantitative survey data with qualitative interviews to capture the realities of a sector still in rapid formation. The approach mirrors that of the European Reuse Barometer and the French Baromètre du Vrac et du Réemploi—a methodology designed to ensure that insights are comparable at both national and European levels.

THE ROLE OF REUSE IN THE PACKAGING TRANSITION

Across Europe, the fight against packaging waste has entered a decisive phase. Following the adoption of the EU Packaging and Packaging Waste Regulation (PPWR), binding reuse and refill obligations will apply to Member States from 2026 onwards. These measures aim to reduce packaging waste by up to 15% by 2040 and to mainstream reusable formats in beverages, transport and grouped packaging **(European Union)**.

According to Fost Plus, the total volume of household packaging placed on the Belgian market has been steadily declining since the COVID-19 peak—dropping from over 804,000 tonnes in 2021 to 734,651 tonnes in 2023—and saw "another decrease" to 728,392 tonnes in 2024 due to improved eco-design and prevention measures **(Fost Plus)**. Still, recycling alone cannot fully decouple packaging growth from environmental pressure, as historical trends show limited progress in reducing waste generation **(Rethink Plastic)**. Reuse systems offer a complementary path, enabling material prevention, lowering demand for virgin inputs and mitigating exposure to volatile material costs.

A NATIONAL MOMENTUM

Belgium has a long-standing culture of reuse, well illustrated by its deposit system for returnable glass bottles—particularly in the beer sector—which has been part of the national packaging landscape for decades. Consumers are accustomed to returning bottles in exchange for a small deposit, a practice that has made reuse both tangible and widely accepted. Although the share of refillable bottles has declined over time from 45% in 2018 **(IVCIE)** to about 43% in 2024 **(Fost Plus)**, this tradition provides a strong foundation on which to build the next generation of reuse systems. Building on this legacy, the present Barometer seeks to map existing reusable-packaging practices across Belgium and to support the development and scaling of the industry.

OBJECTIVES OF THE BAROMETER

The **2025 Belgium Reuse Barometer** pursues three main objectives:

1. **Assess the maturity** of reuse across sectors and company sizes, highlighting gaps in infrastructure, regulation, and financing.
2. **Measure impact** and establish baseline indicators for employment, return rates, washing capacity and circular investment.
3. **Support coordination** between public and private stakeholders to accelerate the development of an interoperable, economically viable reuse ecosystem.

In doing so, the Barometer positions Belgium within the wider European movement towards reusable packaging. It serves both as a **national reference document** and as a **contribution to the harmonisation of indicators** across European countries, ensuring that progress can be tracked consistently at European scale.

CLOSING PERSPECTIVE

This first edition is exploratory by design: it sets out to understand, measure and mobilise. Its ambition is to provide a shared evidence base to strengthen cooperation between industry actors, policymakers and citizens, and to demonstrate that reuse is not only a regulatory requirement—but a strategic opportunity for innovation, sovereignty and sustainable growth.

By establishing this foundation, the Belgium Reuse Barometer aims to catalyse collective action and position the country as a leader in circular packaging systems—where "Refuse, Reuse and Reduce" complement recycling to build a low-waste economy for the years ahead.

METHODOLOGY

METHODOLOGICAL APPROACH

The Belgian Barometer method combines quantitative and qualitative data collection:

1. ONLINE SURVEY

Between July and October 2025, a survey was distributed to companies working on reusable packaging and headquartered or operating in Belgium. 34 companies answered the survey.

The questionnaire collected self-reported data on company profiles, market maturity, product mix, logistics models, and perceived regulatory or financial barriers. It also gathered quantitative information on employment, turnover, product ranges, and funding raised. Unless otherwise specified, all indicators refer to the full calendar year preceding the year of publication (i.e. data in the 2025 edition reflects activities and results from 2024).

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2. DATA VALIDATION AND CONSOLIDATION

Responses were cross-checked to ensure internal consistency. The analysis focused on identifying patterns and trends, rather than statistical representativeness, consistent with the exploratory nature of this first edition.

To ensure representativeness despite a relatively limited sample size (16 reuse companies headquartered in Belgium responded to the survey), the analysis also includes companies operating in Belgium but headquartered abroad, as these actors actively experience and influence the Belgian reuse ecosystem. For questions specifically addressing the national context—such as the regulatory environment or policy support—the analysis focuses on companies headquartered in Belgium, whose perspective more directly reflects the country's institutional and regulatory framework.

3. INDICATOR DEVELOPMENT

Each survey question was transformed into a measurable indicator for annual monitoring (see Appendix). These indicators span five analytical dimensions:

- Company Characterisation and Packaging Used
- Economic and Financial Indicators
- Sector Maturity and Readiness
- Regulatory and Institutional Context
- Operational and Systemic Levers

4. COVERAGE

Companies headquartered or operating in Belgium were invited to participate in the survey. Participants were contacted by InOff Plastic by direct email (86 companies in total) and through outreach conducted in partnership with Fost Plus and ConsomAction, using a combination of direct communication channels (emails and phone calls) and broader dissemination tools such as newsletters.

5. LIMITATIONS

As this is a first edition, data coverage is not exhaustive. Indicators rely on self-declared data that may vary in accuracy. Though, cross-checks have ensured the coherence of the data. Nevertheless, the responses provide a representative overview of the diversity and maturity levels of companies operating in the reusable packaging industry currently active in Belgium, serving as a robust baseline for future iterations.

The percentages presented in this report are based on a limited sample of companies (on average a bit less than thirty, and sometimes fewer depending on the indicator). Percentages were used to facilitate data comparison and readability, but they should be interpreted with caution. Given the small number of respondents, these figures may not be fully representative of the overall industry. They are intended to highlight trends and indicative orders of magnitude that help to understand the sector's dynamics.

ANALYTICAL FRAMEWORK

Inspired by the *2024 European Reuse Barometer*, analysis of the Belgian reusable packaging dataset was structured around three complementary lenses:

- **Readiness and Maturity:** assessing both the sector's overall development and the readiness of individual companies (from early-stage to industrial maturity).
- **Economic Dynamics:** evaluating growth potential, investment patterns, and financial needs of companies.
- **Systemic Levers:** identifying enabling conditions—policy support, funding instruments, innovation trends—that can accelerate the transition from pilot projects to large-scale deployment.

This framework will serve as a foundation for annual tracking, allowing comparisons across years and alignment with European monitoring tools on packaging waste prevention.

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SAMPLE COMPOSITION

The 34 reuse companies surveyed are a mature and well-established cohort. Half of them have their headquarters in Belgium, with the rest based in neighbouring countries (Germany, France, Netherlands, Lithuania). Compared to the 2025 European Barometer, respondents skew older. This higher age aligns with a high Social Readiness Level (SRL) in Belgium, indicating many firms are beyond the pilot stage.

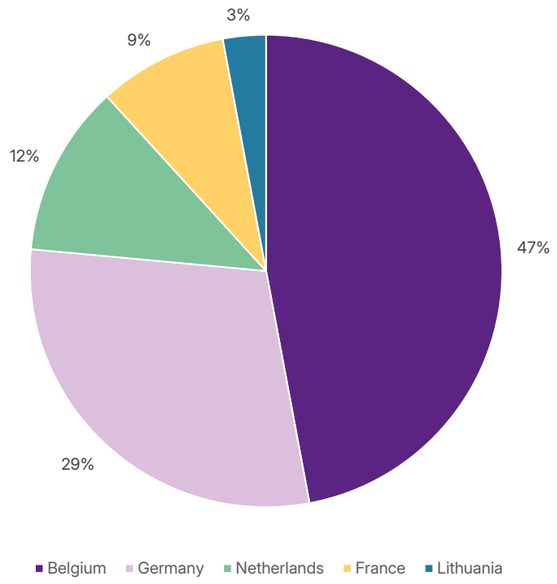

*Figure 1 – **Distribution of companies operating in Belgium by location of their headquarters** (sample: 34 companies operating in Belgium)*

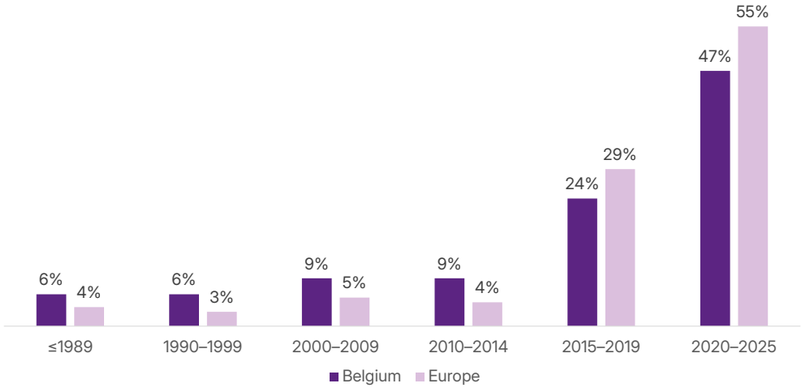

*Figure 2 - **Distribution of companies by year of creation** (sample: 34 companies operating in Belgium)*

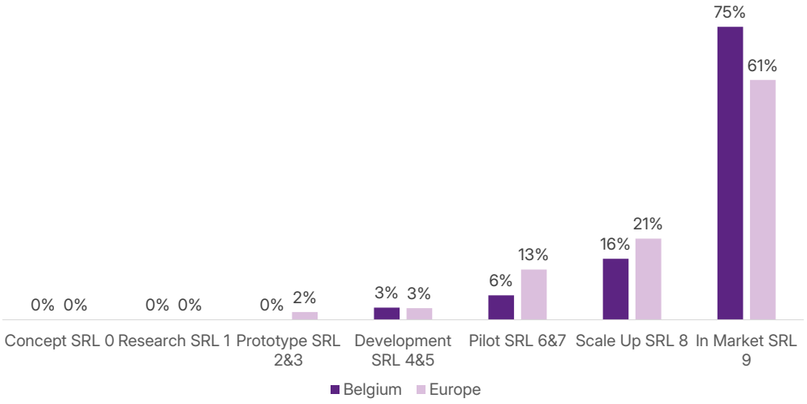

*Figure 3 - **Distribution of companies by their level of Social Readiness Level (SRL)** (sample: 33 companies operating in Belgium, 102 in Europe)*

UNDERSTANDING THE SECTORS ANALYSED IN THIS REPORT

The reusable packaging ecosystem covers diverse sectors, each with distinct use cases and operational contexts:

- **Retail** refers to the reusable packaging used for consumers to purchase their everyday products (e.g. packaged food, beverages, personal care) at physical points of sale (e.g. shops, supermarkets, cosmetic retailers).
- **E-commerce** covers reusable packaging used to protect products shipped directly to consumers for online sales and home deliveries—from webshops and subscription boxes to marketplaces.
- **Hospitality** includes reusable packaging used in cafés, restaurants, hotels, canteens, and event venues where food and drinks are served or taken away.
- **B2C Hospitality** relates to packaging used in the downstream supply chain: by businesses to cater for their customers (e.g. reusable cups and containers for on-site dining and/or takeaway)
- **B2B Hospitality** refers to packaging used in the upstream supply chain: by suppliers to deliver goods to hospitality businesses (e.g. reusable jars or beverage bottles or kegs).
- **Transport / Industrial** includes packaging used to move, protect, and group goods across the supply chain—such as crates, pallets, or boxes used in logistics and warehousing—excluding large shipping containers.

See the detailed definitions in the Appendix.

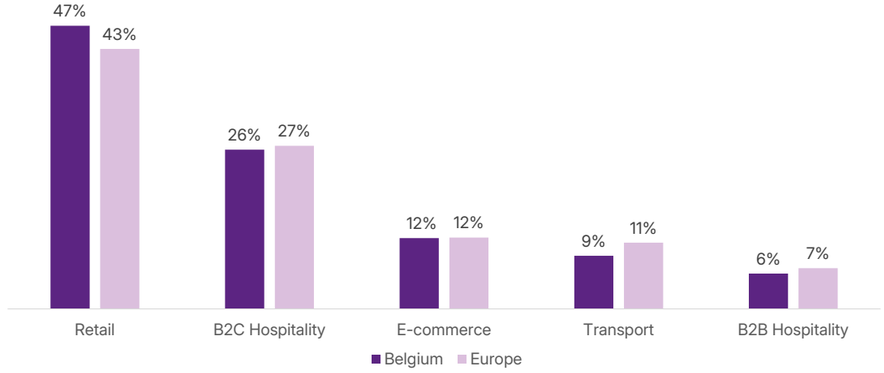

*Figure 4 - **Distribution of companies by sector of activity** (sample: 34 companies operating in Belgium, 117 in Europe)*

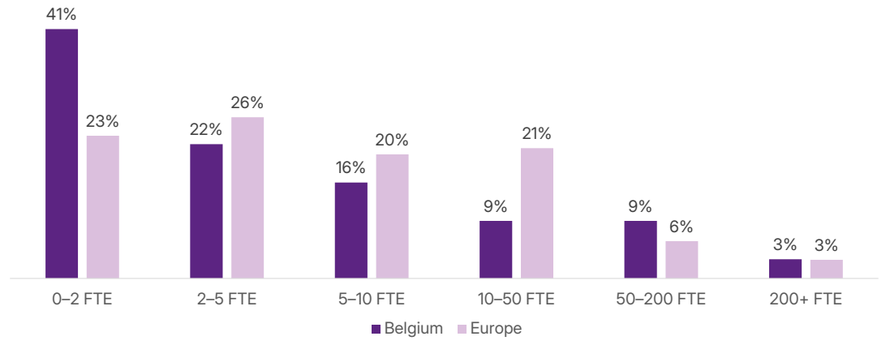

*Figure 5 – **Distribution of companies by number of full-time equivalent (FTE) employees working on reuse activities** (sample: 31 companies operating in Belgium, 101 in Europe)*

Company size remains modest among respondents. Nearly 60% of companies employ fewer than five people on reuse activities, compared with about half at the European level. Larger organizations are less represented: only 9% employ between 10 and 50 staff, and fewer than 12% exceed 50 employees. Hiring intentions reflect similar patterns—over half of companies plan to recruit fewer than five new employees in the next two years, while only a small minority foresee expanding beyond 25 new hires. These figures confirm that the companies surveyed are still composed mainly of small, agile structures with limited human resources dedicated to reuse.

Sectorally, the mix of companies surveyed mirrors the average of European companies surveyed, covering areas from B2B transport packaging to B2C hospitality. Notably, reuse teams remain relatively small: both current FTE counts and planned hires over the next two years are slightly below the European mean, with a strong over-representation of companies employing 0-2 FTE on reuse activities. In other words, the reuse firms surveyed tend to be lean and at an intermediate scale despite their maturity.

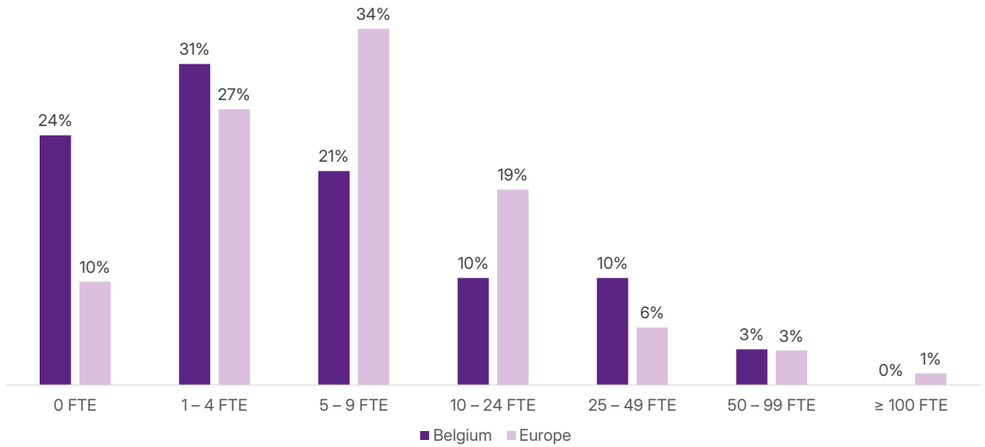

*Figure 6 – **Distribution of companies by number of FTE recruitments planned within the next two years for reuse activities** (sample: 31 companies operating in Belgium, 92 in Europe)*

Reusable cup pilot at Rotterdam Central by NS (Dutch national railway operator) Packback, enviu and Verpact
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KEY FINDINGS

REUSABLE PACKAGING TYPE AND COST

The reuse companies surveyed report using a consistent set of packaging types across respondents. Among the 15 companies that provided data on packaging formats and materials, identical materials were used for identical applications—namely, glass for beverage bottles (wine, beer, soft drinks), plastic for crates, cups, and food containers, and glass for jars. The only notable exception is e-commerce packaging, which is predominantly made of plastic (75%), with a smaller share in cardboard (25%).

Despite the clear environmental rationale, cost remains a major barrier (except for crates in the mature transport sector). For beverage bottles and cups, the unit cost of reusable packaging is still higher than that of single-use equivalents. Respectively 5 and 3 companies reported that reusables are more expensive to purchase or rent. This cost advantage for single-use packaging is due to a lack of scale as when it comes to more mature sectors, crates stand out as economically favorable, with 2 companies stating that they are cheaper than their single-use counterparts and this is backed by other major crates and pallet companies like IFCO, Brambles and Fozzy Group.

These cost dynamics also affect consumer-facing pricing. For beverage bottles, 4 companies said that the product sold in a reusable container is more expensive for consumers than the same product in a disposable format. For beverage cups, 2 companies companies report a higher retail price, while the remaining firms split between parity (25%) and a lower price (25%). While these insights suggest that price competitiveness remains a challenge in consumer-facing segments—where perception and sensitivity to cost strongly influence purchasing behavior—the small number of responses means these findings should be interpreted as indicative rather than representative.

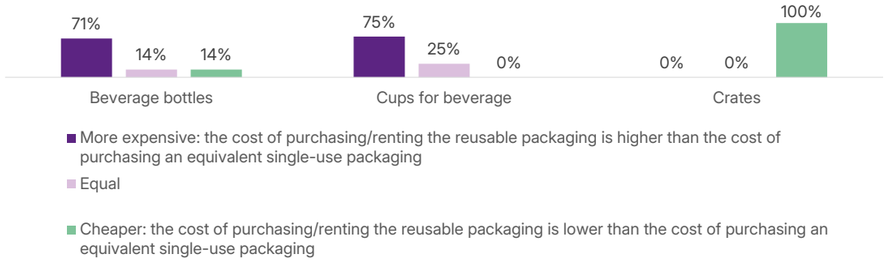

*Figure 7 – **Comparison of the purchase price for companies versus equivalent single-use packaging** (sample: 8 companies operating in Belgium reporting over 13 packaging types)*

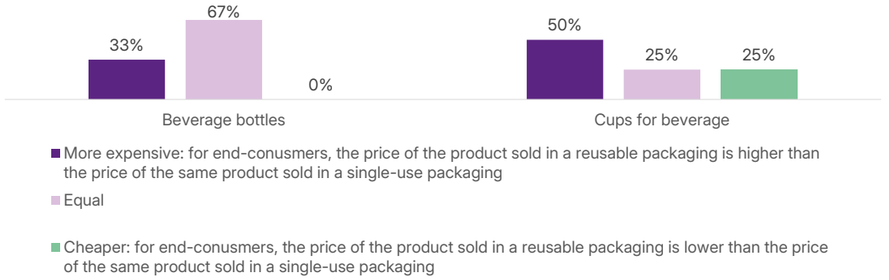

*Figure 8 – **Comparison of the price for consumers of products sold in reusable packaging versus equivalent single-use packaging** (sample: 7 companies operating in Belgium reporting over 10 packaging types)*

For beverage bottles and cups, the higher cost of reusable packaging at the company level makes businesses decide to absorb this additional cost internally or pass it on to their clients—such as cafés, restaurants, or end consumers. However, the dynamics differ by format and context.

Reusable cups used in closed-loop environments (e.g. universities, events) benefit from predictable return flows and higher return rates, making the model more scalable with the right infrastructure. Open systems like bottles in retail, face more complex logistics and lower return predictability, making cost recovery more difficult, thus they might be more dependent on subsidies.

In both cases, some market actors are deeply committed to reuse and are willing to subsidize the model themselves in the short term. This underscores not only the strong values driving early adoption but also the pressing need for long-term solutions to ensure the situation becomes viable by addressing cost competitiveness—whether through scale, operational efficiencies, or supportive policy frameworks.

The example of Maria & Franz initiative, launched by La Conserverie & Moutarderie Belge, which introduced reusable jars with a deposit model into mainstream retail shows that with the right infrastructure, branding, and collaborative logistics, reusable formats like jars can gain traction—even in price-sensitive segments. The case study of Euro Plant Tray initiative, demonstrates how industry-led standardization and shared investment can make reuse financially viable and operationally scalable, even in complex B2B supply chains.

FOCUS – THE COST OF REUSABLE GLASS BOTTLES: A COMPLEX EQUATION

Reusable glass bottles were projected to become cheaper than single-use glass bottles by 2024, according to forecasts by the World Economic Forum. However, in practice, cost parity remains difficult to achieve and depends heavily on the specific conditions of production and supply. The cost competitiveness of reusable bottles varies significantly based on producer size, bottle format, and procurement channels:

- Larger producers benefit from economies of scale, direct purchasing from glass manufacturers, and reduced transport costs per unit—advantages not always accessible to smaller operators.
- Small bottle formats (33cl) are generally less cost-efficient to reuse because, despite their lower product value, they still incur most of the same operational costs as larger bottles (75cl)—such as washing, transport, and handling. Since the cost of a comparable single-use bottle is already very low, reusable versions must operate within a highly efficient system to be economically viable. This cost-efficiency threshold is easier to reach with larger bottles, where the higher unit price provides more room to absorb the additional costs of reuse.

Looking ahead, reuse is expected to gain competitiveness as volumes grow, industrial processes improve, and fixed costs are amortized. In contrast, the price of single-use glass may be more exposed to inflation, energy market fluctuations, and raw material scarcity.

CASE STUDY - EURO PLANT TRAY: STANDARDIZED REUSE AT SCALE

Launched in 2022, Euro Plant Tray (EPT) is a cross-European cooperative developing a reusable, standardized tray system for the horticultural sector. Backed by 30+ industry members and major retailers like Bauhaus, Coop, and Obi, the system is designed for 100+ reuse cycles and includes RFID, 2D matrix, and barcode tracking for seamless RTI integration.

EPT trays become cost-effective after just 3–4 cycles and are financed through a crowdinvestment campaign with 1,500+ private investors, showcasing a new model for scaling reuse infrastructure. Over time, the project aims to eliminate millions of single-use trays from European supply chains.

Key Takeaways:

- Sector-driven standardization enables interoperability and scale.
- Smart tracking ensures operational efficiency and future-proofing.
- Financial viability is achieved quickly, aided by rising disposable costs.
- Innovative crowdfunding lowers barriers to infrastructure investment.
- Offers a replicable model for B2B reuse systems across Europe.

This case adds value by showing that reuse can scale through industry coordination, even in complex supply chains. Read more about it here and here.

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CASE STUDY - RETAIL-READY REUSE WITH MARIA & FRANZ

In 2022, La Conserverie & Moutarderie Belge (CMB)—producer of sauces, spreads, and mustard—launched Maria & Franz, a dedicated reuse brand packaged in standardized glass jars with a €0.15 deposit. The goal: test reusable jars in mainstream retail using existing drink bottle return machines to make reuse effortless for consumers.

The line was rolled out in Delhaize and Carrefour stores in the Eupen region, supported by partners Foodprint and Bring Back, who manage logistics and automated washing. The jars (250ml and 500ml) are part of a shared container pool, reducing cost exposure and operational burden for CMB.

Key results:

- Continuously increasing return rates were supported by the integration of reusable jars into existing drink bottle deposit machines—leveraging infrastructure already familiar to consumers and eliminating the need for new behaviors or systems.
- Strong shelf visibility boosted early adoption.
- Shared logistics and washing removed complexity for the producer.
- Standard packaging streamlined collection and sorting.
- The jar pool offered protection against packaging market volatility, especially during the 2023 energy crisis.

Maria & Franz shows that reuse in food retail can scale—when it's simple for consumers and collaborative for producers.

TRACKING

Note: Percentages in the graph do not sum to 100% as several companies use multiple traceability technologies simultaneously.

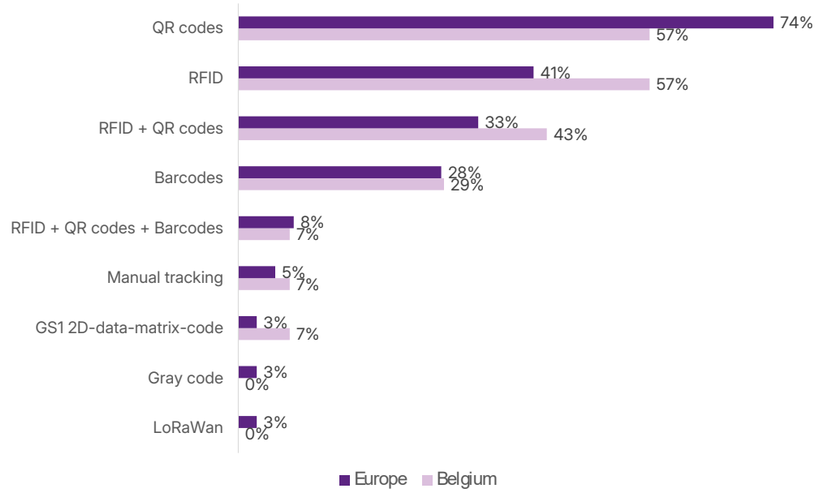


*Figure 9 – **Technologies used to track reusable packaging** (sample: 14 companies operating in Belgium)*

Results show that stock management and asset tracking are the most widespread applications among reuse systems using digital tools, with 93% of companies employing IT solutions to monitor reusable assets across their supply chains—slightly above the European average of 91% (sample: 15 companies in Belgium, 47 across Europe).

Technology used for traceability is mostly based on QR codes, RFID and a combination of both. QR codes and RFID systems are each used by 57% of reuse companies, with more than one third using both in combination. Other methods such as barcodes (29%), manual tracking (7%), and GS1data matrix codes (7%) are also reported but at lower levels. This shows a strong sectoral shift toward automation and traceability, essential for managing packaging flows, deposits, and return rates.

Borro's case study below illustrates how digital solutions and tracking in particular can transform reuse systems in contexts where customer expectations for convenience, security, and ease of use are particularly demanding—demonstrating the potential of IT to overcome one of the most complex barriers to adoption: user experience.

Borro

CASE STUDY - FRICTIONLESS REUSE FOR A BETTER FAN EXPERIENCE

In 2025, Club Brugge—Belgium's most successful football club of the past decade—decided to overhaul its reusable cup system. Despite earlier efforts, the club faced persistent operational challenges: long queues at collection points, manual refunds, and recurring losses from fraud and errors. Seeking a smarter, simpler, and more scalable solution, the club partnered with Borro, a Belgian company developing technology-driven reuse systems.

After testing three smart cup solutions during home games between January and May 2025, Club Brugge selected Borro for its seamless integration, reliability, and affordability. The system went live in July 2025—just ten days before the new season—and quickly transformed the fan experience.

Borro's approach is based on QR-code tracking (preferred to RFID to ensure maximum recyclability of the cups). When a fan buys a drink, a 1.5€ deposit is temporarily reserved on their payment card. Once the cup is returned, the deposit is automatically released within minutes—no app, no manual refund, no queues.

The results were immediate and measurable:

- Fraud losses fell by an estimated 10,000€ per year
- Refund transaction fees decreased by 5,000€ annually
- Staffing needs at return points dropped by one-third
- The return rate reached 93%, and the number of cups produced decreased significantly
- Fans reported shorter waiting times and a smoother matchday experience, with higher average spending per fan

Beyond the technology, the partnership reflects a shared philosophy of practical innovation. Both Borro and Club Brugge focus on sustainability through simplicity—creating systems that work invisibly in the background to improve user experience.

This reuse system illustrates how digital traceability and automated deposits can track performance and remove friction from reuse systems enabling large-scale, high-turnover environments such as stadiums to operate reuse effectively without compromising convenience. Check this link to learn more about it.

While this is one example, several service providers in Belgium offer similar solutions. For organisations seeking support tailored to their needs, the Reduce & Re-Use MatchMaker platform by Valipac and Fost Plus or ConsomAction helps connect businesses with the right partners.

TURNOVER, GROWTH, PROFITABILITY AND FUNDING

TURNOVER & GROWTH

Revenue figures show that surveyed companies have higher turnover linked to reuse than the EU average: the largest revenue bands are overrepresented in the sample. This again reflects the sample's older age profile.

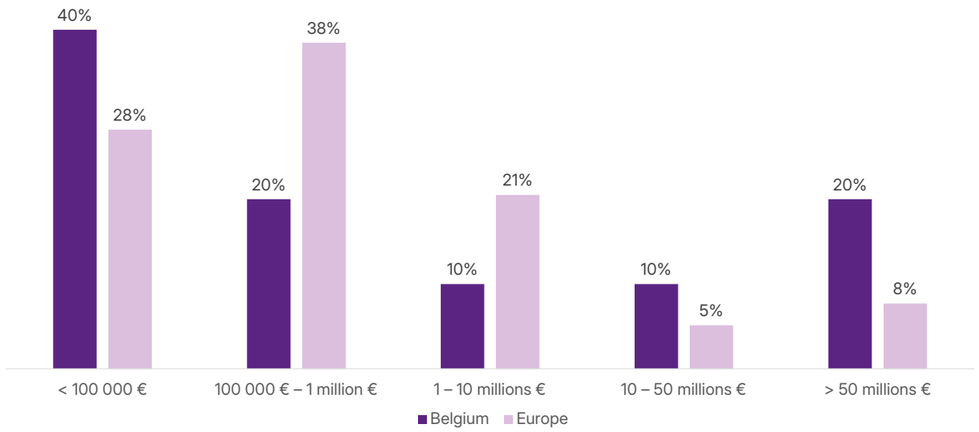


*Figure 10 - **Distribution of companies by turnover generated from activities linked to reuse-related activities in 2024***
(sample: 10 companies operating in Belgium, 39 in Europe)

Among the 10 companies with multi-year data reuse-related turnover has grown at roughly 11 % per year on average between 2022–2024, though the sample is small to extrapolate this figure to other reuse companies in the country.

COMPANIES' PROFITABILITY

Profitability varies sharply by segment. A slight majority of surveyed reuse firms (54%) report already generating a positive operating margin, slightly above the European average (53%). Looking by sector, the most profitable reuse operators tend to be in transport and B2B Hospitality, where systems (often invisible to consumers) are mature and with scale reusable has become more competitive than single-use. By contrast, retail, B2C hospitality and e-commerce reuse ventures report far lower profitability, also reflecting more recent sectors.

This shows that these companies might have been launched for environmental reasons with a rather long-term profit perspective. E-commerce reuse is especially challenging due to logistics: companies note that "it costs more to send back a packaging than to buy a new cardboard," making their current models financially unsustainable. Overall, most surveyed companies that are not yet profitable still expect profitability to arrive in the coming 1–3 years, indicating a sector in rapid scale-up phase (see timeline figure).

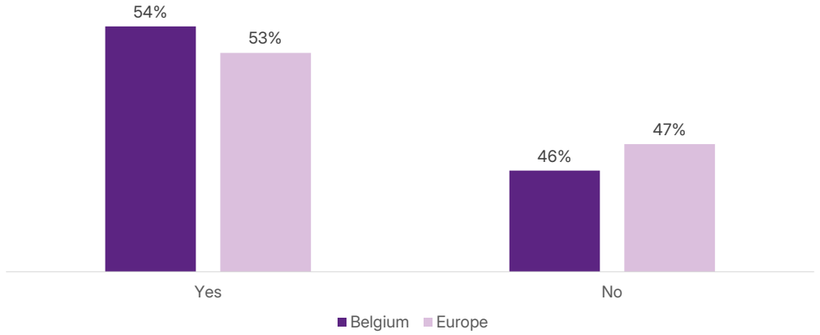


*Figure 11 – **Share of companies whose reuse activities generated a positive operating margin in 2024***
(sample: 26 companies operating in Belgium, 78 in Europe)

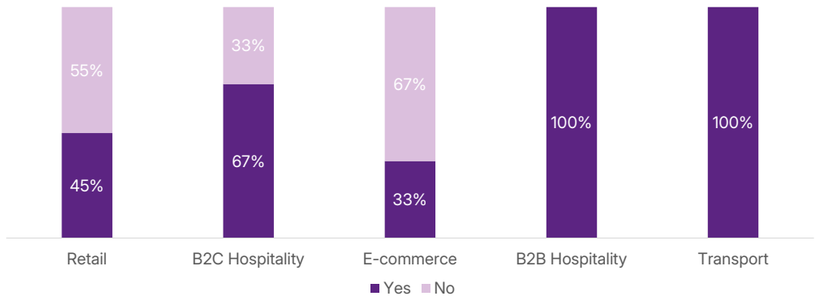


*Figure 12 – **Share of companies whose reuse activities generated a positive operating margin in 2024, by sector of activity** (sample: 24 companies operating in Belgium)*

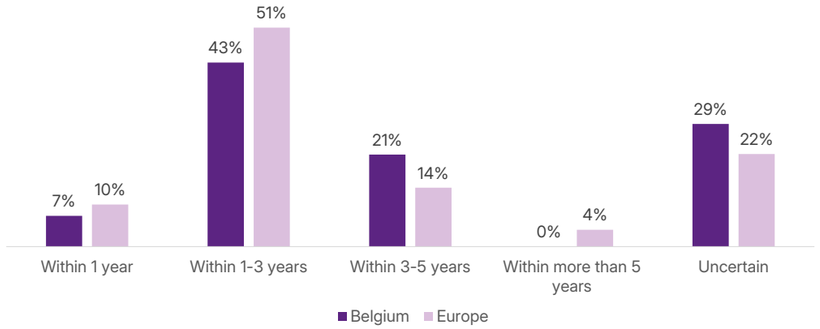
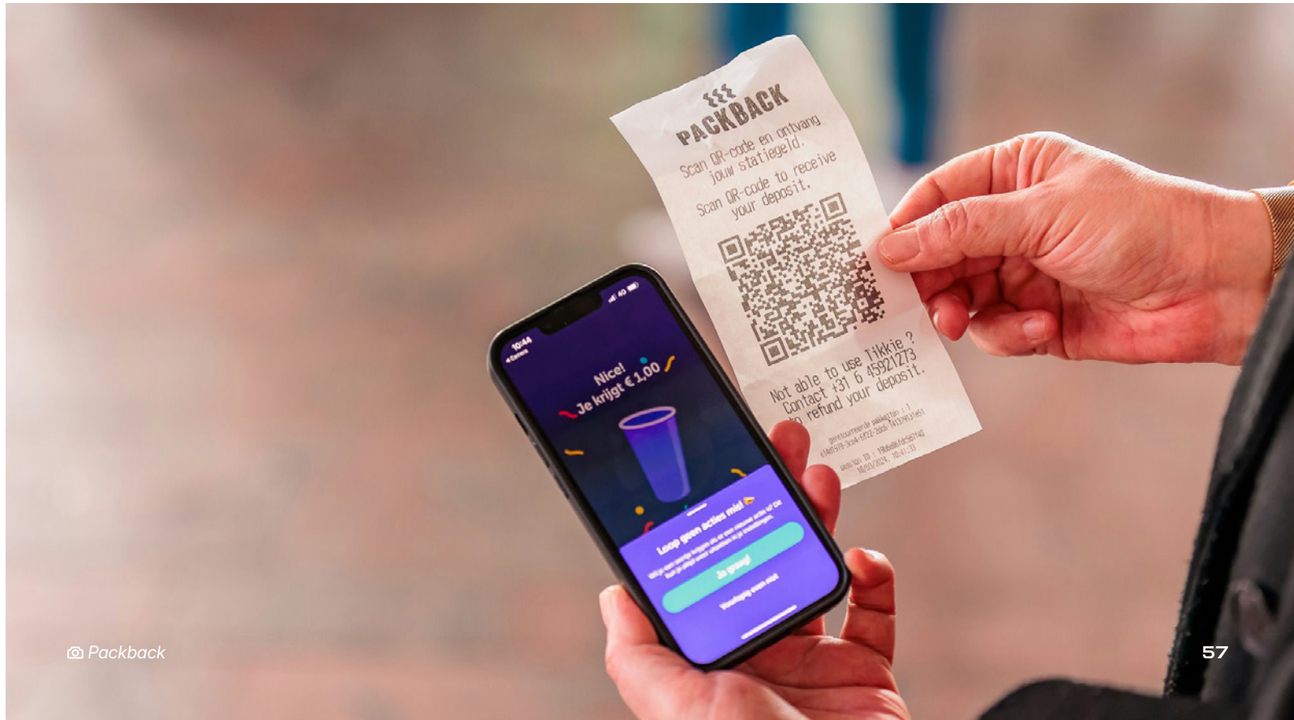


*Figure 13 – **Anticipated timeline for companies to reach a positive operating margin from their reuse activities** (sample: 14 companies operating in Belgium and 51 in Europe; only includes companies that have not yet reached profitability)*

Most companies anticipate reaching profitability within one to three years. This signals a pivotal moment: the sector is no longer in its infancy, but not yet mature. The next few years will determine whether reuse models can shift from early adoption to long-term viability.

For many respondents, success hinges not only on their internal efficiencies but on external conditions—namely supportive regulation, infrastructure investment and increased consumer engagement. Companies emphasize that this is a "momentum window": if the right support mechanisms are activated now, reuse can scale into a mainstream alternative to single-use packaging. Several actors highlighted the need for transitional assistance, such as targeted subsidies for reverse logistics or stronger incentives for consumer returns to counter existing barriers (see section Industry's maturity and barriers).



Packback

CASE STUDY - REUSABLE PACKAGING IN E-COMMERCE: A MODEL UNDER PRESSURE

E-commerce reuse ventures are navigating a complex economic terrain. These initiatives were launched with a strong environmental motivation to reduce single-use packaging, and some of them are still in the process of identifying viable business models.

Two main reverse logistics models currently structure the e-commerce reuse landscape:

1. Return via Paid Postal Services

Examples: *RE-ZIP*, *Reutec*

In this model, consumers return reusable packaging through national postal operators. While operationally simple, the cost of return shipment can exceed that of buying new single-use packaging. For instance, in France, the return cost per unit can reach 1.5€—placing a burden either on consumers or on the service providers themselves. In current pilots, to encourage adoption, it is free for consumers to return the packaging and therefore, companies like Amazon or packaging firms such as RE-ZIP and Hipli are absorbing these costs.

Some studies, such as one conducted by Tchibo in Germany, show encouraging signs: nearly two-thirds of users indicated a willingness to contribute to the return cost. Nevertheless, without changes in postal pricing or scaled logistics, these systems remain financially challenging. Their long-term success may depend on public incentives, subsidies, or evolving consumer expectations.

2. Integrated Return via Delivery Networks

Examples: *Loop & UPS*, *DHL Capsule*

Another model involves integrating packaging return into the delivery process. Packaging is collected directly by the delivery provider during the drop-off, or the consumer returns it to designated access points. This system improves convenience and return rates, and reduces consumer effort. However, it requires a dedicated logistics backbone, along with coordinated partnerships between brands, couriers, and reuse operators.

Although this approach reduces friction, the added logistics and handling steps still result in higher costs compared to single-use solutions. Stakeholders believe this model holds promise, particularly if economies of scale can be achieved and supported by more favorable regulatory frameworks.

Conclusion

E-commerce reuse systems are still in a phase of active experimentation. While cost efficiency remains a key hurdle, early initiatives are paving the way and identifying levers for improvement. With growing consumer interest, technological innovation, and policy support, there is cautious optimism that reuse in e-commerce can evolve into a viable and scalable model.

ACCESS TO FUNDING

Funding history shows firms on par with Europe: total capital raised (or planned by 2029) averages 3.7M€ per company (compared to a European average of around 4.3M€ per company in 2025 and 4.1M€ in 2024).

The deals are distributed as follows (based on 6 companies operating in Belgium):

- 3 solutions have raised or planned to raise between 50K€ and 1.5M€
- 2 solutions have raised or planned to raise between than 2.5 and 4M€
- 1 of the solutions have raised or planned to raise more than 10M€

Interestingly, fewer companies report actively seeking new funding now compared to the EU average, suggesting that they may be either sufficiently capitalized or growing organically.

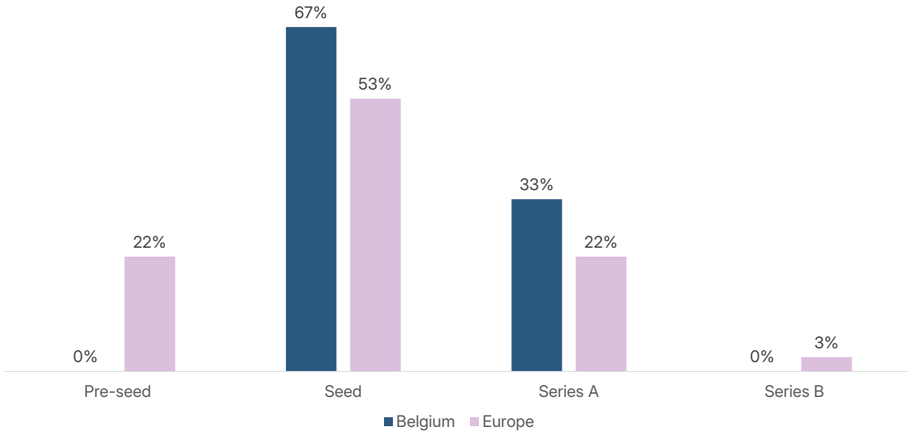


*Figure 14 – **Distribution of companies by their funding stage** (sample: 6 companies operating in Belgium, 36 in Europe)*

THE FUNDING STAGES

The funding stage reflects a company's level of maturity and the type of external financing it has received or is seeking. It indicates how far the business model has evolved—from initial idea to commercial expansion.

- **Pre-seed:** The very early phase when a company is being created and tested. Funding usually comes from founders, friends and family, or small grants to develop a prototype or conduct first market tests.
- **Seed:** The start-up begins validating its business model and gaining first clients. Investments (often under 1 million €) come from early-stage venture funds, business angels, or public programmes supporting innovation.
- **Series A:** The company has a proven concept and seeks to scale. Funds raised (often several million euros) support hiring, production capacity, and market expansion.
- **Series B:** The business aims for national or international growth. Investors finance acceleration—new markets, industrialisation, or acquisitions—with larger tickets (typically 5–10 million € or more).
- **Series C and beyond:** The company is established and raises significant capital to consolidate its position or prepare for mergers and acquisitions.
- **Other / Non-equity financing:** Some companies rely mainly on bank loans, grants, or crowdfunding instead of equity investment. These remain common among smaller or impact-oriented enterprises.

A majority of respondents are positioned in the early to mid-growth stages, with 67% reporting they are at the seed stage and 33% at Series A. Capital expenditures (CAPEX) at launch varied considerably across the sample, from low-cost pilot initiatives to multi-million-euro infrastructure investments, particularly in the retail sector. Compared to their European counterparts, fewer companies reported receiving grants (38% vs. 51%) and demonstrated a slightly greater reliance on private fundraising and crowdfunding. However, given the limited sample size (6–9 respondents) for these indicators, the findings should be interpreted as illustrative rather than definitive. These results serve as a valuable baseline and could be strengthened in future editions with broader participation.

In contrast, the qualitative findings offer deeper insight. Although only a minority of companies are actively seeking new funding, several stressed that reuse infrastructure already exists—sometimes at industrial scale—yet overall market demand remains too weak to fully activate or expand these systems. As one e-commerce company explained, "We have low demand in the market, but a full system is in place ready to scale up to industrial level. To create demand, legislation (and enforcement) will need to help." A retail-focused company echoed this imbalance, noting that while they are frequently approached by public authorities or stakeholders for awareness-raising initiatives, these actions rarely translate into sustained operational demand or business viability.

Conversely, another respondent observed that the mismatch between potential demand and industrial capacity can also occur in the opposite direction: "there is an immense market of very relevant use cases for reuse, notably in canteens and associated activities, due to their daily consumption practices." In such cases, the necessary industrial tools may exist but remain underutilised or insufficiently oriented toward reuse.

Overall, these testimonies illustrate a structural deadlock: the sector oscillates between an underused industrial base and hesitant market demand. Many actors appear to be waiting for the market to reach a level of maturity where reuse becomes effortless and cost-competitive—a deadlock that slows progress. Breaking this cycle requires clear regulatory signals and enforcement mechanisms capable of converting latent potential into actual market uptake, by encouraging companies that are still in a "wait-and-see" position to engage proactively, recognising that the transition away from single-use is accelerating and that readiness for reuse will soon become a market imperative.

While financing challenges exist, particularly among less mature players in retail, e-commerce, and B2C hospitality, most respondents agree that the core barrier lies in insufficient market demand rather than lack of capital. Stronger policy signals and supportive frameworks will therefore be critical to unlock investment confidence and create a fair competitive environment with single-use alternatives.

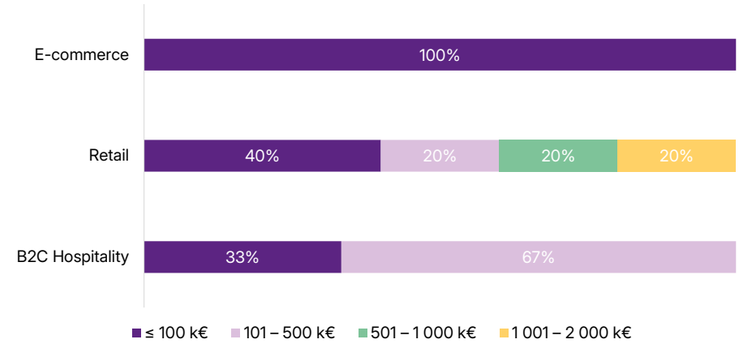


*Figure 15 – **Distribution of companies by amount of capital expenditures** (CAPEX) invested at the launch of their reuse operations (sample: 9 companies operating in Belgium)*

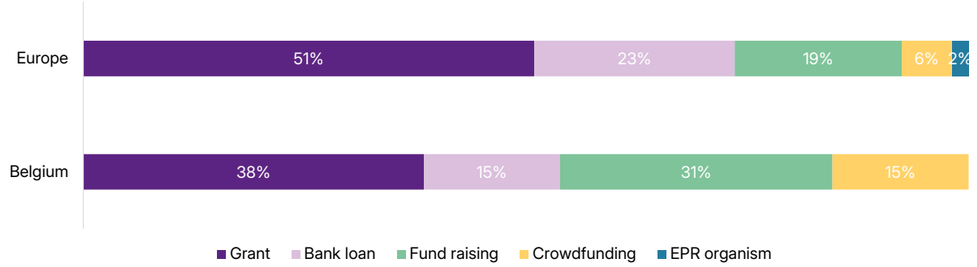


*Figure 16 – **Distribution of companies by type of external financial support received** (sample: 9 companies operating in Belgium, 43 in Europe)*

Note: Fund raising is defined here as capital raised from private investors such as business angels or venture funds.

MARKET OUTLOOK AND ENABLING CONDITIONS

INDUSTRY'S MATURITY AND BARRIERS

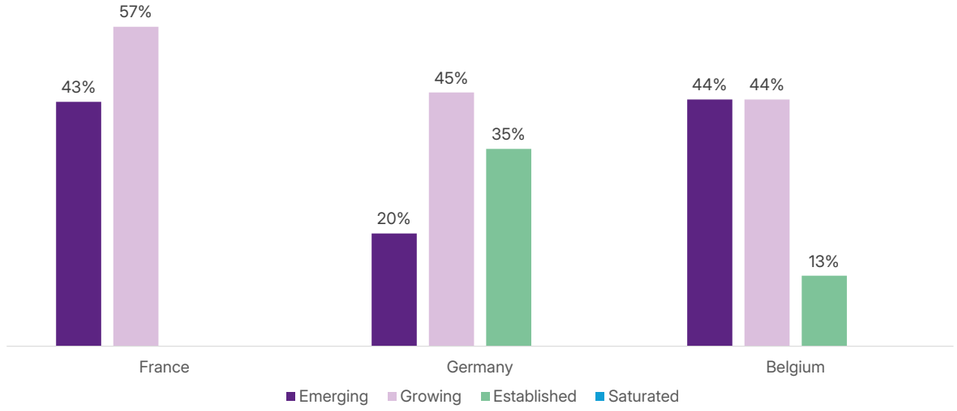


*Figure 17 – **Perceived maturity of the reusable packaging industry** (sample: 30 companies headquartered in France, 20 in Germany, 16 companies in Belgium; countries shown are those with the highest number of responses)*

The firms surveyed see their market as relatively advanced: compared to Germany and France, Belgium is the second country, after Germany where the reusable packaging industry is perceived as the most 'Established', reflecting a high level of sector confidence. Nevertheless, respondents still identify clear obstacles to further scale. The top three concerns are:

- Consumer adoption (raised by 10 companies)
- High investment costs (7)
- Supply chain integration (7)

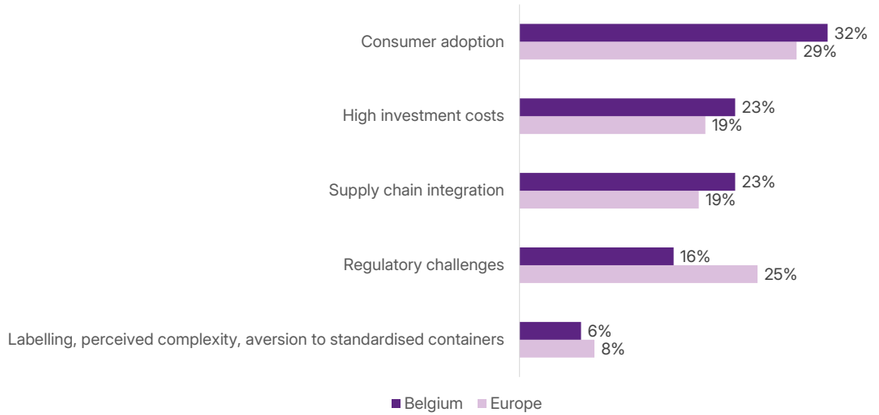


*Figure 18 – **Main barriers to scaling reusable packaging solutions by sector of activity** (sample: 15 companies headquartered in Belgium and 101 in Europe)*

CONSUMER ADOPTION

Consumer adoption stands out as the leading constraint. Companies emphasise that although awareness is rising, behavioural change among consumers remains limited. To drive adoption and returns, companies report a mix of incentives and customer programs. Key strategies include:

- **Pricing and marketing incentives.** Several e-commerce players emphasise affordability and awareness campaigns. One solution, for instance, relies on a "low price point and intensive marketing" to promote reuse and match the convenience of single use.
- **On-site engagement**. Retailers stress human encouragement. According to one retailer, attempts at gamifying returns "did not work"; instead, the "best tool" has been direct encouragement by store personnel. This shows that visible reminders and staff advocacy can significantly boost reuse behaviors.
- **Convenience and rewards.** Several firms are implementing loyalty schemes and easy-return options. Respondents say they are introducing or planning features like loyalty points, home collection services, mobile apps and widespread drop-off locations to make reuse more convenient for consumers.

Overall, the qualitative feedback shows that companies are experimenting with both financial (price or points) and non-financial (education, convenience) incentives. They emphasize that consumer habits will only change with a combination of the right incentives and infrastructure – a finding consistent with the chart data showing strong demand for supportive measures.

INVESTMENT COSTS AND SUPPLY-CHAIN INTEGRATION

High investment costs and supply-chain integration are closely linked concerns. Developing reusable systems often requires substantial upfront spending on infrastructure and logistics, while coordination across collection, washing, and redistribution remains fragmented. One e-commerce company highlights the need for "free drop points with pick-up for returns" and "more competitive return networks to lower the return cost." A hospitality operator adds that distance from professional dishwashing facilities limits efficiency and calls for "on-site or nearby cleaning equipment to reduce turnaround times."

Together, these findings suggest that while reuse solutions are technically ready, market alignment and infrastructure cohesion lag behind and could really support cost-competitiveness and wide-adoption. Companies are willing to scale, but doing so will require stronger consumer engagement, clearer regulatory support, and investment in shared logistics networks to make reuse as convenient and cost-effective as single use.

REGULATORY ENVIRONMENT AND SUPPORT NEEDED

Most surveyed companies perceive the national regulatory framework for reuse as only moderately supportive. Among Belgian respondents, 38% describe the national environment as "Somewhat supportive," while 50% consider it "Neutral" or "Not supportive." France shows a slightly higher share of positive responses. Yet overall, businesses across Belgium, France, and Germany share a sense of regulatory neutrality: 78% of companies perceive the national regulatory framework as being either "Somewhat not supportive", "Neutral" or "Somewhat supportive" —a stance insufficient to accelerate market transition.

When asked which measures would most effectively support the sector, regulation clearly outweighs financial aid. Thirty percent of respondents called for "stronger regulations banning single-use packaging or mandating reuse," followed by 20% for "consumer education and awareness" and 15% for "stronger enforcement." These results show that companies primarily seek clear, ambitious, and consistently applied rules that would create long-term certainty and fair competition with single use.

The European Packaging and Packaging Waste Regulation (PPWR) is viewed in a similar light: one third of respondents rated it "neutral," another third "somewhat supportive," and only 7% "very supportive." As one transport-packaging company noted, "*There is still too much ambiguity around PPWR and how this will translate to national legislation... It would be good to clarify PPWR and impact between reuse and recycling.*" While the PPWR sets ambitious reuse targets, clarity and enforcement will be essential to turn them into business confidence and concrete investment—allowing companies to plan effectively for the 2030 objectives.

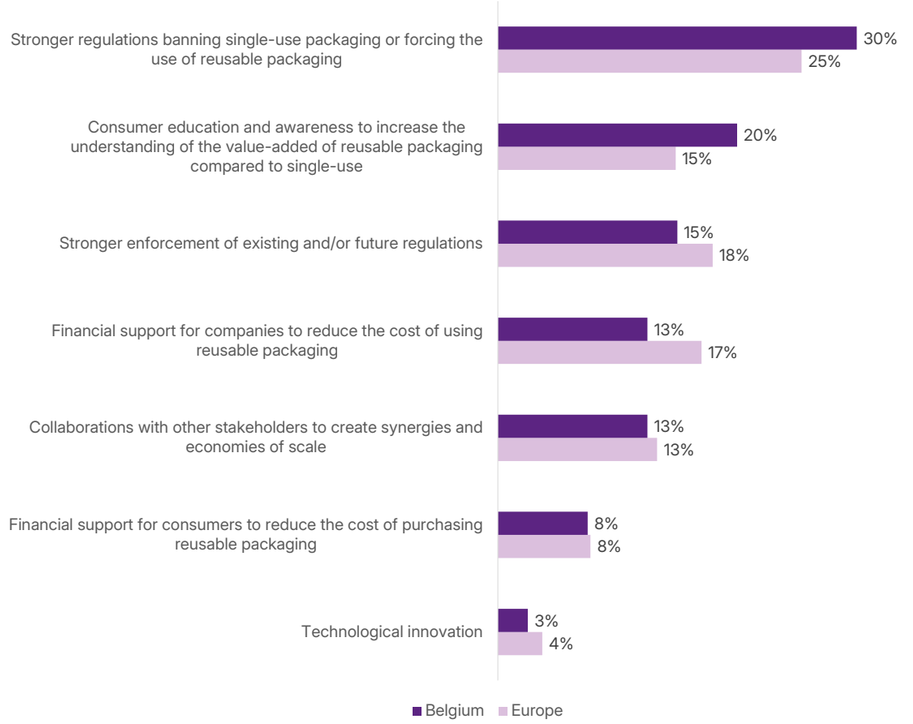


*Figure 19 – **Types of support that would most benefit companies active in reusable packaging** (sample: 14 companies headquartered in Belgium and 100 in Europe)*

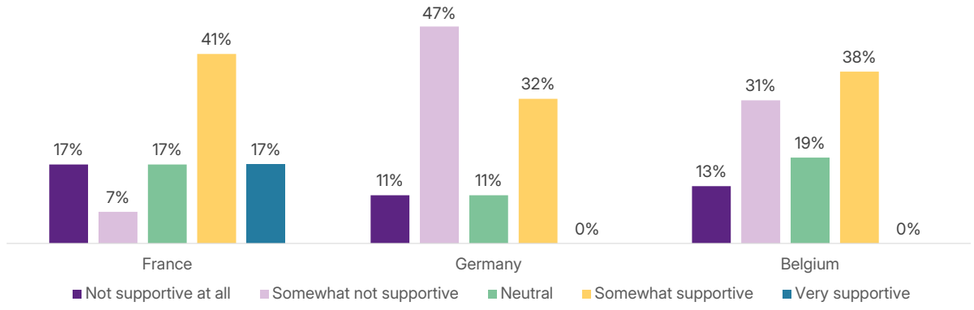


*Figure 20 – **Perceived level of support from the national regulatory environment for the reusable packaging industry** (sample: 16 companies headquartered in Belgium, 29 in France, 19 in Germany; countries shown are those with the highest number of responses)*

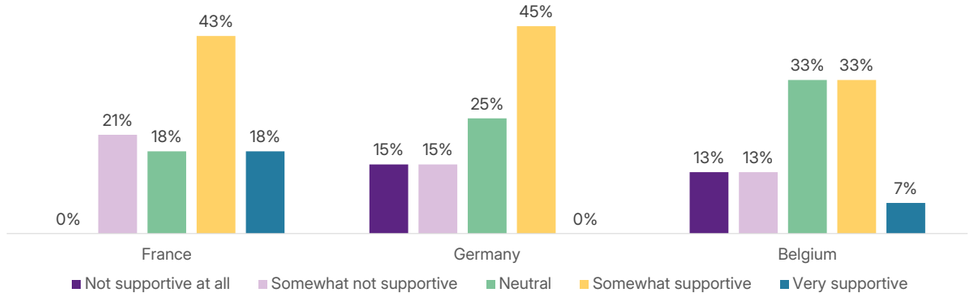


*Figure 21 – **Perceived level of support from the Packaging and Packaging Waste Regulation (PPWR) for the reusable packaging industry** (sample: 15 companies headquartered in Belgium, 28 in France, 20 in Germany; countries shown are those with the highest number of responses)*

GROWTH EXPECTATIONS AND INNOVATION TRENDS

Companies in every sector express strong growth expectations. Survey charts show nearly universal optimism: almost all sectors forecast expansion of reuse services over the next five years. This positive outlook is accompanied by concrete innovation plans. Respondents identify several key trends, including:

- **Expanded return infrastructure.** E-commerce and retail firms plan new collection networks. For example, one company anticipates the rollout of "free drop points with pick-up for returns," along with more competitive return networks to cut customers' costs.
- **Enhanced logistics systems.** Providers emphasize that robust reverse-logistics will be decisive. As one producer bluntly notes, developing "a solution for return-logistics will determine the success of reusable packaging".
- **Smart tracking.** Technology is a priority: hospitality operators point to "Smart systems" for automated tracking and handling,
- **Standardization.** Retailers foresee increasingly standardized containers (e.g. uniform bottles) to simplify reuse cycles.

Taken together, these trends reflect a broader industry momentum: many companies are actively investing in logistics and technological infrastructure in anticipation of continued growth. However, this overall optimism should not obscure the challenges faced by certain actors, particularly in more established sectors where demand is stagnating or even declining. In some cases, volumes are decreasing, and expectations of scale have not yet materialized. These models—though promising—require targeted support, especially considering that the majority of surveyed companies remain in early stages of development and expect to reach profitability within the next one to three years (as seen in the Profitability section). Ensuring their stability during this transitional phase will be critical to consolidating the reuse sector's long-term viability.

One such example is emerging within the well-established Belgian beer segment, where a new pilot aims to enhance circularity through secondary packaging innovation:

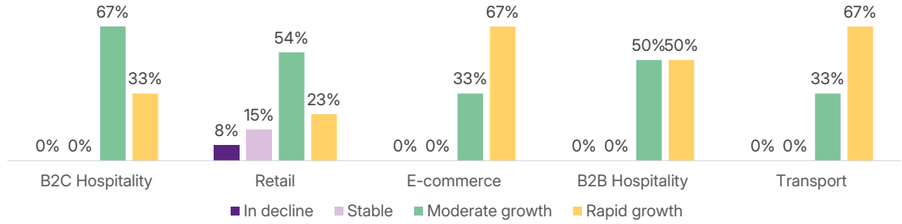


*Figure 22 – **Expected development of reusable packaging in each sector over the next 5 years** (sample: 30 companies operating in Belgium)*

CASE STUDY - RETHINKING THE SIX-PACK: DW REUSABLES' BEVERAGE CRATE PILOT

In 2024, DW Reusables introduced a reusable six-pack crate designed to replace single-use cardboard sleeves for beer multipacks—demonstrating that even in mature reuse segments like glass beer bottles, further innovation is possible. The pilot, running through 2025, is backed by a broad coalition including Carrefour Belgium, Royal Swinkels, Fevia, the REuse Lab at the University of Antwerp, MIVAS, and Tomra for reverse vending. Twintag is supporting with digital tracking and consumer engagement.The system uses existing Tomra deposit machines for returns, making it easy for consumers to adopt without requiring new infrastructure. Already, the pilot has eliminated over 15,000 cardboard sleeves, with clear potential to scale up and replace millions of units nationally.

Key insights so far:

- **Operational alignment** across partners is critical—especially for integrating logistics and refining the crate design.
- **Consumer adoption** is supported by the familiar deposit system and in-store visibility.
- The project has opened discussions on how to **adapt communication, retail integration, and backend logistics** at scale.

This pilot illustrates how reuse innovation can extend beyond primary packaging and strengthen circular performance—**even within sectors where reuse is already the norm**. Learn more about this pilot here and here.

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CONCLUSIONS

THE BELGIAN REUSE SECTOR AT A CROSSROAD

CONDITIONS FOR ACCELERATION

EMERGING REUSE ECOSYSTEM AND GROWTH OUTLOOK

The Belgian reuse sector is expanding steadily. Among companies surveyed, nearly all expect to expand their reusable packaging operations in the next five years, across new products, markets, or services. In addition, an average revenue growth of 11% was recorded among 10 Belgian companies between 2022 and 2024—showing tangible economic momentum despite the limited sample size.

Optimism around profitability is also strong: while 58% of companies already report a positive operating margin in 2024, a further group expects to reach profitability within 1–3 years. This indicates that the sector is transitioning from pilot phase to scale-up, especially in transport packaging where margins are most solid.

DEMAND AND CONSUMER ENGAGEMENT

Despite having infrastructure in place, many companies face a major constraint: insufficient demand. Several respondents explain that reusable packaging—particularly beverage bottles and cups—remains significantly more expensive than single-use alternatives, which limits both business viability and customer adoption. Only transport packaging is consistently seen as cost-competitive. This price imbalance makes it difficult to drive volume, which in turn prevents cost efficiencies from being realized.

As one e-commerce company noted, “We have low demand in the market, but a full system is in place ready to scale up.” This illustrates a broader challenge: reuse systems exist and are ready to expand, but without stronger demand signals, particularly from consumers or regulation, they remain underutilized and financially strained.

Moreover, consumer behavior remains inconsistent: many companies state that reuse uptake is “driven by short-term communication campaigns” rather than regular habits. Respondents highlight the need for incentives like loyalty programs, easier drop-off systems, and better integration into daily life to increase reuse engagement.

OPERATIONAL BARRIERS AND ENABLERS

Even when reuse infrastructure is technically in place, companies report significant challenges in scaling operations. Many reuse systems—particularly in hospitality, retail, and e-commerce—require complex coordination across collection, return, cleaning, and redistribution processes. Without a dense network of return points, optimized transport routes, and centralized cleaning facilities, operations remain fragmented and inefficient.

Several companies highlighted the logistical burden of managing returns, especially when collection volumes are low or spread across wide geographic areas. This reduces the number of reuse cycles achievable per unit and undermines both environmental impact and cost-efficiency. Respondents consistently call for more shared infrastructure—such as pooled return logistics, standardized container formats, and regional washing hubs—to improve system performance and scalability.

At the same time, the lack of cost-efficiency and limited incentives from legislation make it difficult to enter markets with high reuse potential—such as restaurants and catering services. They remain largely underdeveloped or dominated by small operators unable to reach scale. The result is a circular standstill: infrastructure exists, but demand remains insufficient; and without visible market pull, investment in new capacity is delayed or deprioritized. This further reinforces operational fragmentation and slows progress toward systemic reuse adoption.

By contrast, companies that report more stable or scalable operations—especially in the transport packaging segment—share a common trait: strong collaboration across the value chain. These firms operate within established networks of logistics, cleaning, and technology partners, allowing them to spread costs and streamline operations. Shared washing hubs, interoperable container standards, and multi-actor logistics platforms are frequently cited as key enablers. These collaborative approaches demonstrate that, where the right operational foundations exist, reuse systems can scale effectively.

REGULATION AND POLICY ALIGNMENT

The Belgian regulatory environment is widely perceived as insufficient to support the scale-up of reuse. 44% of companies rated the national framework as ‘neutral or not supportive’, and only 7% viewed the EU PPWR as ‘very supportive’. Businesses consistently call for stronger, clearer, and enforceable

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rules: 30% demand bans or mandates on reuse, while 15% emphasize the need for more robust enforcement mechanisms.

This lack of regulatory clarity is particularly problematic given the operational standstill highlighted earlier. Many companies have already invested in reuse infrastructure, yet find themselves stalled due to low demand, scattered logistics, and a lack of economic incentives while promising markets remain unserved. In this context, a neutral regulatory stance does not maintain balance—it reinforces stagnation. Without a clear political signal and enforceable commitments, companies are discouraged from making long-term investments or planning at scale.

Several firms describe existing rules as vague, particularly regarding how PPWR targets will be implemented nationally. As one company noted, “there is still too much ambiguity around PPWR and how this will translate to national legislation.” To unlock the sector’s potential, regulation must be more ambitious, coordinated, and actively enforced. Only then will it give companies the clarity and confidence needed to break out of the current cycle and invest in the full-scale deployment of reuse systems.

APPENDIX 1

LIST OF COMPANIES THAT ANSWERED THE SURVEY

The companies highlighted in this report come from a voluntary sample: they represent only a portion of the organisations consulted, and exclusively those that explicitly agreed to appear in the final publication.

AVAMOPLAST, BELGIUM

Avamoplast is a belgian leading manufacturor of plastic packaging with a specialisation in the development and production of single-use plastic for food packaging. Recently also exploring the market of reusable plastics packaging.

BAGFACTORY, LITHUANIA

Bagfactory produces eco-friendly reusable bags made in Europe from recycled materials (rPP & rPET). They help retailers comply with EU packaging rules while boosting their sustainable brand image.

BORRO, BELGIUM

Borro builds the digital backbone for reuse. Their cashless deposit system automates refunds for reusable cups, making reuse easy, scalable, and truly circular.

LA FABRIQUE CIRCUIT COURT, BELGIUM

La Fabrique circuit Court (FCC) brings together processing workshops and storage spaces dedicated to the short food supply chain.

The project FCC is carried out in close collaboration with the Paysans-Artisans Cooperative.

FOODPRINT, BELGIUM

Foodprint is a distribution partner for producers and retailers. It selects products according to an environmental and social charter. It facilitates the use of returnable containers by collecting them and collaborating with the Bring Back washing center.

DOTCH, GERMANY

dotch ist the reuse system provider for prepackaged food in glass packaging. It delivers a full-system service, that runs as easy as single-use for the producers and connects every stakeholder on the reuse-supply-chain smoothly.

EURO PLANT TRAY, GERMANY

The Euro Plant Tray cooperative united the Green Industry in a shared mission: replacing single-use plastic with a reusable plant trays system that saves CO2 and resources, a pioneering example of circular economy in action.

NOWA MARKET, BELGIUM

Nowa Market promotes sustainable living by offering organic and local food in reusable glass jars. A zero-waste solution that makes responsible consumption easy and accessible to everyone.

MISSION REUSE, NETHERLANDS

Mission Reuse is a transition program by Enviu and Fair Resource Foundation which accelerates the transition to reusable packaging systems. They unite businesses, governments, and innovators to build scalable, interoptable, circular infrastructure for reuse.

PACKCONTROL, NETHERLANDS

The all-in-one reusable packaging registration software. Easy, automated processing of your returnable packaging in a user-friendly system.

LET'S REPEAT, BELGIUM

Let's Repeat offers sustainable solutions for events and businesses by providing reusable cups and catering materials for rent and sale, and a cleaning service. They help reduce waste and promote eco-friendly practices with high-quality, durable products.

RE-UZ, FRANCE

Pioneered by Ecocup, Re-uz is Europe's leader in reuse. It provides end-to-end solutions for events, hospitality, HoReCa & corporates: production, logistics, washing & redistribution. More than products, a full ecosystem driving positive change.

CIRCULAR LOGISTICS, GERMANY

Fully circular product, reusable packaging solution for bulky goods, featuring a foldable box that reduces waste, CO_2 emissions, and transport damage, replacing single-use packaging with a zero-waste, sustainable system.

SEA ME, GERMANY

SEA ME GmbH operates zerooo, the first open reusable system for cosmetics and personal care. Starting as a proof of concept, zerooo became a digital deposit system enabling brands and retailers to join the circular economy—cutting waste and protecting resources.

CORPLEX, FRANCE

Corplex designs, manufactures, and recycles reusable polypropylene packaging tailored to each client's operations. From retail to white goods their durable solutions cut waste and CO_2. It closes the loop by buying back their end-of-life packaging for recycling.

WAKECUP, BELGIUM

Vente de gobelets réemployables et de matériel de restauration. Lave-vaisselle professionnels, à vendre ou à louer, pour rincer et sécher les gobelets réemployables et le matériel de restauration. Conseils pour une utilisation durable lors d'événements.

RUNDEN GROUP, GERMANY

The Runden Group operates Europe-wide in sustainable logistics and packaging solutions. Their portfolio includes reusable transport packaging, customized logistics concepts for the food industry. Innovation and efficiency are central to their operations.

PACKBACK, NETHERLANDS

PackBack Network makes reuse of F&B packaging scalable through smart, automated systems that cut costs and build customer loyalty. By connecting data, automation, and digital incentives, they help brands transition from single-use to sustainable reuse at scale.

RAJAPACK BENELUX, BELGIUM

Rajapack Benelux, part of the RAJA Group, specializes in packaging, warehouse, and office supplies. With a wide product range and fast delivery, it serves businesses in e-commerce, industry, retail and logistics across Belgium and the Netherlands.

VYTAL GLOBAL, GERMANY

VYTAL is a global leader in tech-enabled Reusable Packaging for food & beverages. It operates in 21+ countries, saving millions of disposables every year by serving thousands of clients including KFC, EURO 2024, Paris Olympics, Oracle Park, and Chic-fil-A.

RUBBISH REUSABLES, NETHERLANDS

Rubbish Reusables offers the next generation of reuse: smart, reusable cups and The Rubbish Portal to measure and reduce CO_2 emissions and waste, helping municipalities and organizers make events sustainable and future-proof.

WOOPAK, FRANCE

Woopak designs custom reusable packaging that replaces single-use boxes, cutting logistics cost, waste and carbon. Foldable structure, rugged materials, brand customization and QR traceability, backed by Accent Diffusion's industrial know-how.


Nowa Market

APPENDIX 2
LIST OF INDICATORS TRACKED

Indicators monitored for this barometer. Unless otherwise specified, all indicators refer to the full calendar year preceding the year of publication (i.e. data in the 2025 edition reflects activities and results from 2024).

1. COMPANY CHARACTERISATION AND PACKAGING USED

- Headquarter and countries of activity
- Year of creation
- Sector of activity (E-commerce, B2B Hospitality, B2C Hospitality, Retail, B2B Packaging - transport / industrial)
- Type of activity provided around reusable packaging (e.g. Design, Producer/Retailer, Manufacturer, Cleaning/Reconditioning, Traceability)
- Level of Social Readiness Level (SRL)
- Number of full-time equivalent (FTE) employees (working part or full-time on reusable packaging)
- Number of FTE recruitments planned within the next two years (working part or full-time on reusable packaging)
- Type of reusable packaging used (Beverage bottles, Crates, Cups for beverage, etc.) and main materials used (Glass, Plastic, Metal, Cardboard, etc.)
- Price of the reusable packaging compared to the price of the equivalent single-use packaging (Cheaper, Equal, More Expensive)
- Price of the product sold in the reusable packaging compared to the same product sold in an equivalent single-use packaging (Cheaper, Equal, More Expensive)
- Packaging compliance with a standardisation design
- Technologies used to track reusable packaging (QR codes, RFID, barcodes, manual systems, etc.)

2. ECONOMIC AND FINANCIAL INDICATORS

- Annual turnover in 2024, 2023, 2022
- % of revenue coming from activities linked to reusable packaging in 2024
- Operational profitability of the company's core reusable packaging activity (Yes/No)
- (If applicable) Timeline expected to reach profitability from reuse activities
- Funding stage (Pre-seed, Seed, Series A, Series B, Series C+, Other)
- Capital expenditures (CAPEX) invested at the launch of reuse operations
- Type of investment received (grants, loans, crowdfunding, equity, etc.)
- Yearly total capital raised or planned to raise from 2020 to 2029

3. SECTOR MATURITY AND READINESS

- Perceived maturity of the reusable packaging industry in Belgium (Emerging, Growing, Established, Saturated)
- Perceived maturity of the sector of activity regarding reusable packaging (Emerging, Growing, Established, Saturated)
- Main barriers to scaling reusable packaging solutions (e.g. High investment costs, Consumer adoption)
- Apart from potentiel deposit schemes, specific initiatives or incentives employed to encourage consumer adoption and consistent return of reusable packaging(e.g., Loyalty programs, Convenience factors like drop-off points or home collection)
- Type of support required (e.g. Financial support for consumers to reduce the cost of purchasing reusable packaging, Stronger regulations banning single-use packaging or forcing the use of reusable packaging)

Euro Plant Tray

4. REGULATORY AND INSTITUTIONAL CONTEXT

- Perceived level of support from the national regulatory environment for the reusable packaging industry (Emerging, Growing, Established, Saturated)
- Perceived level of support from the EU Packaging and Packaging Waste Regulation (PPWR) (Emerging, Growing, Established, Saturated)
- Most beneficial type of support required (e.g. Financial support, Stronger regulations)

5. OPERATIONAL AND SYSTEMIC LEVERS

- Existence of collaborating with other stakeholders (e.g., competitors, logistics providers, cleaning services, policymakers) to develop shared reusable packaging infrastructure or standardized solutions
- Expected development of reusable packaging in the sector over the next five years (Rapid growth, Moderate growth, Stable, In decline)
- Trends or innovations anticipated to shape the future of reusable packaging in the sector

GLOSSARY

SINGLE-USE PACKAGING

Packaging which is not reusable packaging.

REUSE

Any operation by which reusable packaging is used again multiple times for the same purpose for which it was conceived.

REFILL

An operation by which a container, owned by the end user, which fulfils the packaging function, or a container purchased by the end user at the point of sale of the final distributor, is filled by the end user or by the final distributor with a product or several products purchased by the end user from the final distributorLVIII.

SYSTEMS FOR REUSE

Organisational, technical or financial arrangements, together with incentives, that allow the reuse either in a closed loop or open loop system. It includes deposit and return systems, when they ensure that packaging is collected for reuse.

REUSABLE PACKAGING

Packaging placed on the market shall be deemed to be reusable where it fulfils the following conditions:

1. it has been conceived, designed and placed on the market with the objective to be reused multiple times
2. it has been conceived and designed to accomplish as many rotations as possible in normally predictable conditions of use
3. it fulfils the requirements regarding consumer health, safety and hygiene.
4. it can be emptied or unloaded without causing damage to the packaging which prevents its further function and reuse
5. it is capable of being emptied, unloaded, refilled or reloaded while ensuring compliance with the applicable safety and hygiene requirements, including those on food safety
6. it is capable of being reconditioned in accordance with Part B of Annex VI, whilst maintaining its ability to perform its intended function
7. it can be emptied, unloaded, refilled or reloaded while maintaining the quality and safety of the packaged product and allowing for the attachment of labelling, and the provision of information on the properties of that product and on the packaging itself, including any relevant instructions and information for ensuring safety, adequate use, traceability and shelf-life of the product
8. it can be emptied, unloaded, refilled or reloaded without risk to the health and safety of those responsible for doing so; and
9. it fulfils the requirements specific to recyclable packaging set out in Article 6 when it becomes waste.

RETURN FROM HOME

Process wherein the reusable packaging is picked up from home by a collection service (e.g. by a logistics company).

RETURN ON THE GO

Process wherein users return the packaging at a store or drop-off point (e.g. in a deposit return machine or a mailbox).

RETURN RATE

Percentage of packaging returned to the starting point at the end of a use cycle. It is an important indicator with major impact on the economics of reusable packaging, as it indicates the number of reusable containers that need to be re-purchased. The higher the return rate, the more economically viable the reuse system is. A return rate higher than 95% should always be pursued, to make a system economically feasible for a system provider.

ROTATION

Cycle that reusable packaging accomplishes from the moment it is placed on the market together with the product it is intended to contain, protect, handle, deliver or present, to the moment it is ready for being reused in a system for reuse with a view to it being supplied again to the end users together with another productLXIV.

UPFRONT DEPOSIT

Deposit scheme where consumers are required to pay a fee when they acquire reusable packaging. The fee is usually paid at the time of purchase and is refunded upon the return of the packaging.

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RETENTION TIME

Average time measured in days a packaging needs to complete one rotation, thus unavailable for reuse as it is currently at another point in the use cycle (e.g., with the consumer, being washed, or being transported). The retention time can vary greatly, depending on the industry and geography of the reuse system. Retention times should generally be reduced to a minimum to use reusable packaging effectively.

PRIMARY PACKAGING

Packaging conceived so as to constitute a sales unit consisting of products and packaging to the end user at the point of sale; also called ‘sales packaging’ by the Packaging and Packaging Waste Regulation (PPWR).

SECONDARY PACKAGING

Packaging conceived so as to constitute a grouping of a certain number of sales units at the point of sale, irrespective of whether that grouping of sales units is sold as such to the end-user or whether it serves as a means to facilitate the restocking of shelves at the point of sale or to create a stockkeeping or distribution unit, and which can be removed from the product without affecting its characteristics; also called ‘grouped packaging’ by the PPWR.

TERTIARY PACKAGING

Packaging conceived so as to facilitate handling and transport of one or more sales units or a grouping of sales units, in order to prevent damage to the product from physical handling and transport, but excluding road, rail, ship and air containers. Also called transport packaging by the PPWR.

MICRO ENTERPRISES

Companies operating with fewer than 10 employees.

SMALL/MEDIUM ENTERPRISES (SMES)

Companies operating with 10 to 250 employees.

LARGE ENTERPRISES

Companies operating with over 250 employees.

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Let's Repeat

EUROPEAN REUSE BAROMETER

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