EUROPEAN REUSE BAROMETER

2025 EDITION

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Runden Group

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A warm thank you for your trust and commitment to moving the reusable packaging industry forward. Special recognition is extended to our national partners whose knowledge, expertise and insights helped to shape this important work.

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Through their funding they made this study possible, demonstrating their commitment to supporting innovation and accelerating the transition toward reusable packaging systems.

verpact

Non-profit organisation founded in 2023 through the merger of Afvalfonds Verpakkingen, Nedvang, and KIDV (Netherlands Institute for Sustainable Packaging). 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

KIUD Technologies

NATIONAL PARTNERS

This second edition of the Reuse Barometer was created with the help of 18 national partners throughout Europe. They play a key role in strengthening the Barometer's quality and relevance at country level. They help ensure broad participation from reuse companies in their network by disseminating the survey through their networks.

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 organisations also contribute financially to 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.

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Zero Waste Europe gratefully acknowledges financial assistance from the European Union. The sole responsibility for the content of this material lies with the author. It does not necessarily reflect the opinion of the funder mentioned above. The funder cannot be held responsible for any use that may be made of the information contained therein.

New ERA represents organisations offering reusable and refillable solutions and support across the entire packaging supply chain — from service providers to research centres — covering various market segments such as takeaway, e-commerce, retail, and transport packaging, and serving both B2B and B2C contexts. 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.

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 systems. Its vision is to accelerate the transition from linear to reusable systems in European countries, thereby avoiding packaging becoming waste in the first place. The platform was launched in September 2022 and has a community of 1.400+ members from 850+ organisations.

Learn more at: planetreuse.eu

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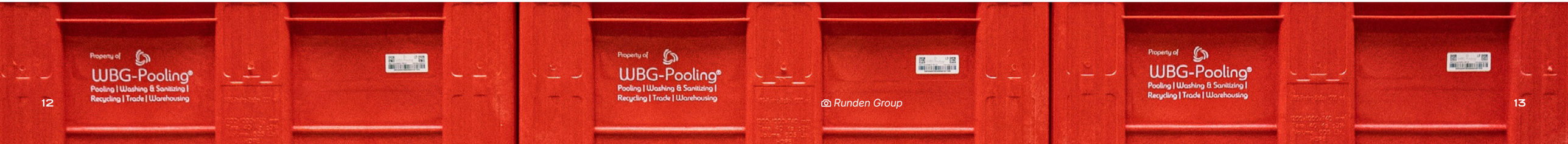

Runden Group

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.

Learn more at: inoffplastic.com

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EXECUTIVE SUMMARY

NOTE ON SCOPE : This report is based on a voluntary, non-exhaustive survey sample, with stronger representation in retail, B2C hospitality and e-commerce than in transport and B2B hospitality. Results should therefore be interpreted as indicative of current trends rather than a complete picture of the entire industry.

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 models to durable, resource-efficient systems. Also, earlier this year, the EU introduced a new, ambitious legislation called the Packaging and Packaging Waste Regulation (PPWR) that includes several targets regarding reusable & refillable packaging, giving the transition away from single-use a significant boost.

A MORE REPRESENTATIVE EUROPEAN PICTURE

The 2025 Barometer has highlighted a vivid European reuse industry. 115 reuse companies across Europe have been surveyed, broadening participation from Germany, Belgium, and the Netherlands, while Central, Southern and Eastern Europe remain underrepresented. The respondents are mainly young, small B2C-oriented companies: 84% were founded after 2015, mainly in retail and hospitality, reflecting strong entrepreneurial momentum but also limited industrial scale under current regulatory circumstances.

A CONSOLIDATING, TECH-DRIVEN INDUSTRY

Despite their youth, reuse companies show **high operational maturity: 82% operate at advanced readiness levels (SRL 8–9).** Respondents report **~11% annual growth**, and 94% expect continued expansion over the next five years. Half are already profitable (coherent with last years' 52%), and 61% of the rest expect to be so within three years. **On average, companies plan to hire 12 employees within two years,** confirming an evolving labor market.

Digitalisation is now central: as one operator stated, "Digitalisation makes reuse seamless, scalable, and trusted." Traceability, smart deposits, and performance analytics have become structural enablers of growth.

PERSISTENT STRUCTURAL CHALLENGES

Cost remains the main barrier. Reusable packaging is still more expensive than single-use in most B2C use cases; only transport packaging (crates, pallets) consistently reaches cost parity. As one e-commerce company explained, "Today it costs more to send back a packaging than to buy a new cardboard (box)." Impact-driven firms and early-adopters consumers are therefore **subsidising reuse** out of commitment rather than competitiveness. **Consumer demand also lags behind supply:** infrastructure exists, but sales volumes are insufficient to reach cost-effectiveness. Convenience and low consumer adoption remain weak points and companies see reverse logistics as adding complexity and cost.

SCALING UP: THE WINDOW OF OPPORTUNITY

Yet, 88% of companies view the market as emerging or growing, showing confidence that scale can unlock profitability. Mature sectors (e.g. transport) already prove that reuse can outperform single-use once economies of scale are achieved.

Collaboration, packaging standardisation, and shared logistics infrastructure are now recognised as key levers to reduce costs and accelerate uptake. However, these efforts will have limited impact without stronger **consumer demand,** which remains the main barrier identified by respondents and is reflected in the underutilisation of cleaning facilities, with 70% of surveyed companies operating at only 2–45% of capacity. To stimulate this demand, **43% of companies cite policy progress and enforcement as the most effective driver. Still, around half of surveyed firms perceive current EU and national frameworks as neutral or insufficiently supportive. A stronger and more harmonised implementation of the PPWR** could therefore play a decisive role in enhancing market visibility and at the same time strengthen investor confidence.

POLICY, INVESTMENT AND COLLABORATION NEEDED

To create a level playing field compared to single use packaging, surveyed companies call for **financial support,** grants, tax credits, or public co-financing, **to bridge the cost gap and for the enforcement of reuse targets mandated by legislation.** "Without public support during these years, many startups might disappear before reaching the scale they need," one respondent warned.

Investors remain cautious under current uncertainty, even though consumer incentives and infrastructure funding could help the industry reach maturity faster. Surveyed companies make clear

that regulation is necessary but not sufficient: 43% call for stronger rules and enforcement while as many request complementary support measures such as financial support, consumer education and shared infrastructure. Taken together, these findings show that binding regulation can only accelerate reuse if accompanied by practical and financial support from public authorities to make systems viable at scale.

CALL TO ACTION

Europe's reuse industry stands at a **turning point** — but its reality differs strongly depending on how the perimeter is defined. Long-standing B2B systems (e.g. transport) are already established and profitable. By contrast, the newer B2C-oriented segments captured in this Barometer are still scaling up and therefore appear more fragile: many of these companies expect strong growth and anticipate reaching profitability within the next three years, yet this trajectory remains subject to critical external conditions.

This signals a structural tension: emerging reuse providers are building capacity and investing ahead of today's limited market uptake, while retailers, brands, and investors remain cautious and often wait for clearer rules, enforcement, and stronger consumer pull before committing fully. In this context, clear regulation, effective enforcement as well as a forward-looking vision from companies and investors willing to genuinely tackle packaging waste at its source is essential to support these companies' development and ensure they reach scale.

Policymakers must **enforce strong reuse targets, fund infrastructure**, and establish a regulatory mandate that allows industry and standardisation bodies to develop **harmonised reusable packaging formats** across markets. Investors and brands must back the transition now, not wait for certainty.

The PPWR's ambitious reduction targets on packaging waste could act as a catalyst for both EU member states and economic actors to explore the waste reduction potential of reuse. Achieving these objectives will require coordinated public–private action — aligning regulation, investment, and industrial implementation — over the next two years. This period will determine whether reuse becomes Europe's new packaging norm or a missed opportunity.

Clubzerø

INTRODUCTION

Since the 2024 edition of the European Reuse Barometer, Europe's policy landscape has moved decisively forward. The European Union (EU)'s landmark Packaging and Packaging Waste Regulation (PPWR)[1] was formally adopted in late 2024 with the aim to regulate all packaging across the EU and will apply from 12 August 2026 in all the Member States. The regulation sets out an ambitious, first of its kind roadmap: legally binding packaging waste reduction targets of 5% by 2030, 10% by 2035 and 15% by 2040, compared to 2018 levels (art. 43). Beyond these targets, it introduces a new policy architecture for reuse and refill — establishing harmonised definitions, market restrictions (i.e. bans) on certain types of single-use packaging, and sector-specific reuse targets covering e-commerce, beverages, transport, and takeaway. While the final text includes unwelcomed exemptions that may dilute its impact, Europe still enters 2025 with a markedly stronger regulatory framework for packaging reuse systems to scale in the next few years. The challenge now lies in a pressing imperative for governments to address the current mismatch between this new EU regulatory environment and the reality of statistics at national level.

On the global stage, progress has been less encouraging. Negotiations for a UN Global Plastics Treaty — aiming at curbing worldwide plastic pollution — have stalled, with talks faltering in 2025 over disagreements on production caps for single-use plastics. The divide between major petrochemical producers and coalitions of ambitious states such as the EU and small island nations has slowed the negotiations — and with them the perspective of a UN-led global deal. Still, the alignment of more than 100 countries around reducing plastic production and advancing reuse represents meaningful progress[2].

Meanwhile, the economic and market context seem to increasingly favour reuse systems. Eurostat reported that although consumer price inflation eased, the Producer Price Index (PPI) for intermediate goods in the EU — covering products such as chemicals, paper, and plastics — remained above pre-2021 levels throughout 2024, reflecting persistent upstream cost pressures on packaging and manufacturing inputs[3]. EPR fees have in some cases sharply increased, reaching around 1,320€/ton in the case of rigid plastic Netherlands for instance[4]. In this context, reuse systems offer a pathway to reduce reliance on single-use packaging purchases, which must be repeated at uncertain and often rising prices. This volatility strengthens the business case for reuse: reducing dependence on fluctuating single-use packaging costs, stabilising supply chains, and improving resilience and

[1] European Union. "EU - 2025/40 - EN." EUR-Lex, 2024

[2] GAIA. "[FOR IMMEDIATE RELEASE] Global South Member States and CSOs Demand Strong Ambition to Secure a Robust Plastic Treaty at INC-5.2."

[3] Eurostat. "Industrial producer price index overview - Statistics Explained - Eurostat."

Eternity - David Arous

competitiveness. If the full environmental costs of disposability were reflected — from carbon to litter or biodiversity loss — reuse would be not only the greener choice but also the smarter financial strategy[5].

At the same time, consumer expectations and industry innovations continue to converge and push the reuse agenda forward. Public interest in sustainable consumption remains strong across Europe. Surveys indicate that a growing share of consumers now actively seek out products with eco-friendly or minimal packaging. In a recent survey, for example, more than half of respondents reported choosing products specifically because of their sustainable packaging in the past six months. Moreover, 39% of consumers say price prevents them from purchasing more products with sustainable packaging and 36% say it is because of its limited availability[6]. This enduring demand signals that environmental criteria are no longer niche preferences but a mainstream consideration for many shoppers (especially younger demographics). In response, businesses are accelerating innovation in reuse and refill systems. Over the last year, major consumer goods brands and retailers have expanded pilot programs for refillable or returnable packaging, exploring new delivery systems and in-store refill stations to reduce single-use packaging waste. In summary, the momentum behind reuse is clearly visible: consumers are receptive to change, and businesses are experimenting with scalable solutions, creating an environment in which reuse and refill systems are increasingly viable.

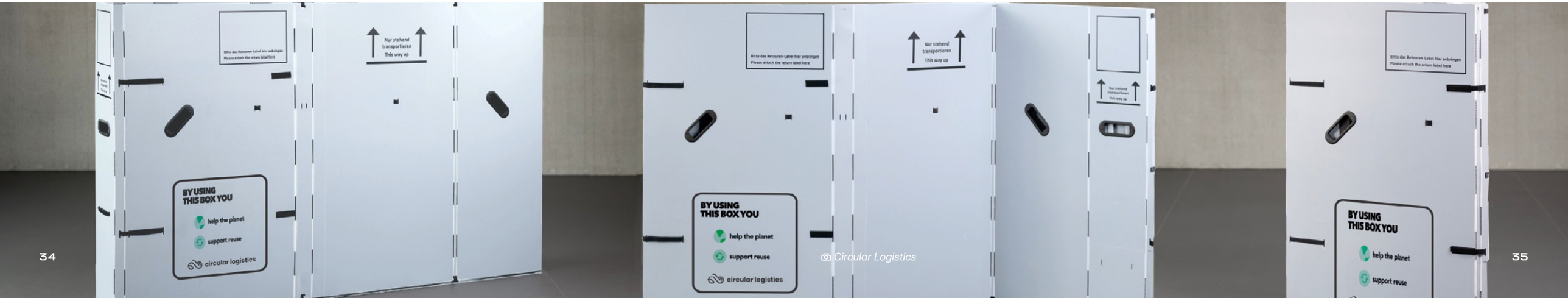
Taken together, these shifts — tighter EU rules, a possible coalition of willing countries at the global level, changing economics, and evolving market demand — could well be a turning point. If the 2024 Barometer edition laid out the rationale for reuse systems and mapped their relevance across e-commerce, retail, and takeaway sectors, this new edition focuses on measuring its real-world maturity. It identifies the key barriers and enablers that will shape the industry's evolution in the coming years.

In short, 2025 stands as a defining year for reuse in Europe — but achieving the full potential of reuse will depend on concerted action across all levels of government, industries, and society in the year(s) ahead. Robust laws are on the horizon, yet implementation and enforcement gaps remain; global solutions are still uncertain, yet local initiatives abound. The European Reuse Barometer continues to track this transformation, highlighting how Europe can move from commitment to impact — and concretely transition away from single use to make reuse mainstream.

[4] Verpact. "Rates." Verpact, 2025

[5] Zero Waste Europe. RSVP – Blueprint for harmonising the implementation of takeaway food and drinks packaging systems for reuse in Europe. 2025

[6] Shorr. "The 2025 Sustainable Packaging Consumer Report." 30 01 2025



Circular Logistics

METHODOLOGY

METHODOLOGICAL APPROACH

The European Reuse 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 Europe. 115 companies answered the survey, an increase of 29% compared to last year.

In total, 710 companies were contacted, and 115 responded — a 16% response rate shaped partly by the level of detail requested in this first survey, the timing of the outreach — which coincided with the summer break — and the fact that the Barometer is still at an early stage, with limited resources and visibility to effectively reach and engage larger companies. The Barometer targets all packaging users — brand owners, manufacturers, retailers — and all reuse-solution providers, including poolers, washers, logistics operators, and digital technology companies.

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.

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 the Reuse Barometer.

To complete the 2025 dataset, when relevant, data from 56 companies that participated in the 2024 edition but did not respond in 2025 has been incorporated — namely, when the information was tracked as well in last edition and remains unchanged over time and contributes to a better understanding of the industry as a whole (e.g. the year of creation). When changes may have occurred between years (e.g. turnover) or when the 2024 data is relevant to compare the samples (e.g. sector of operation), the 2024 data has been used as a comparative baseline against the 2025 results. The type of data used — whether 2025, 2024, or combined — is specified in the caption of each figure.

3. INDICATOR DEVELOPMENT

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

1. Company Characterisation and Packaging Used
2. Economic and Financial Indicators
3. Industry Maturity and Readiness
4. Regulatory and Institutional Context
5. Operational and Systemic Levers

4. COVERAGE AND FOCUS COUNTRIES

Companies headquartered or operating in Europe were invited to participate in the survey. Participants were contacted by InOff Plastic by direct email (710 companies in total) and through outreach conducted in partnership with each national partner, using a combination of direct communication channels (emails and phone calls) and broader dissemination tools such as newsletters.

Although the survey was open to reuse companies from all European countries, a concentration of responses was observed in France, Germany, and Belgium, which together account for the largest share of participants. This higher level of representation enabled more granular analyses on selected indicators for France, Germany and Belgium. These focuses do not aim to exclude other countries, but rather, leverage the higher number of responses from these markets to extract more detailed insights on their respective dynamics. In future editions, similar in-depth analyses can be extended to other countries as the reuse industry will grow there, whilst response rates increase and national participation strengthens.

5. DATA REPRESENTATION AND LIMITATIONS

SAMPLE REPRESENTATIVENESS

While not statistically exhaustive, the 2025 dataset provides a snapshot of current industry dynamics, with strong coverage in some sectors and emerging representation in others. Sectoral coverage is strongest in retail, B2C hospitality, and e-commerce, while transport and B2B hospitality remain less represented. The geographic distribution of respondents is skewed toward Western Europe, and the

company size profile is still largely composed of micro and small to medium-sized enterprises (SMEs).

Together, these elements allow trend analysis, while highlighting areas for broader inclusion in future editions: packaging users — brand owners, manufacturers, retailers — as well as larger reuse companies in the transport and B2B hospitality sectors.

DATA COMPLETENESS AND VISUALIZATION CHOICES

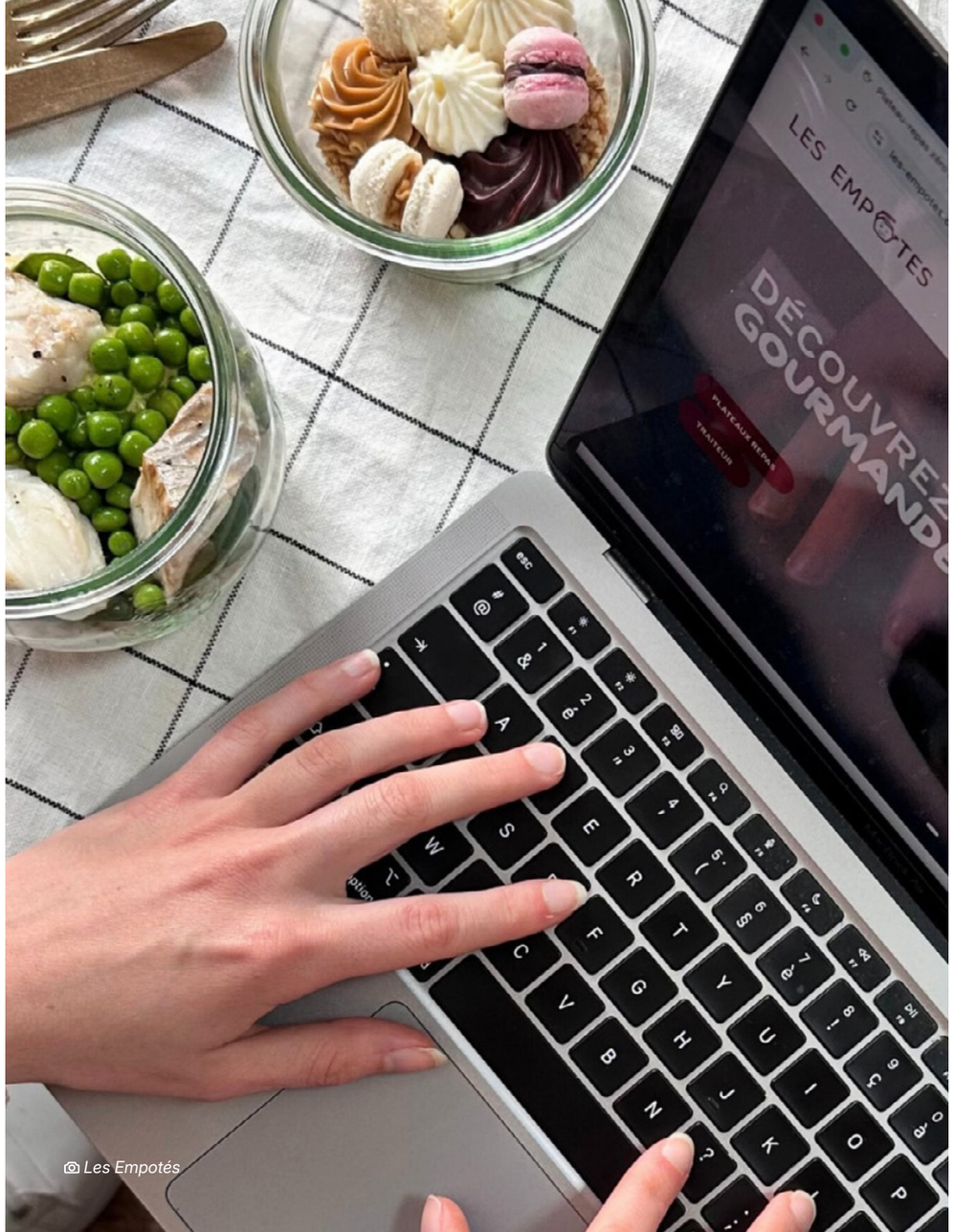
Despite the high number of respondents, not all companies completed every question (e.g. turnover figures) nor did they represent every sector (e.g. fewer respondents in the transport sector). Consequently, some figures are shown in absolute numbers rather than percentages. This methodological choice avoids over-representation of sectors with limited responses, where a single company's answer could disproportionately affect percentages (e.g. one response equating to 33% of a three companies sample).

This approach ensures a balanced visual interpretation of the data and prevents statistical distortions in sectors with smaller respondent pools.

6. RELIABILITY

Indicators rely on self-declared data that may vary in accuracy. Cross-checks have nonetheless ensured coherence and comparability across responses. Overall, the survey provides an overview of the diversity and maturity levels of companies operating in the European reusable packaging industry and serves as a robust baseline for future editions.

(e.g. turnover) or when the 2024 data is relevant to compare the samples (e.g. sector of operation), the 2024 data has been used as a comparative baseline against the 2025 results. The type of data used — whether 2025, 2024, or combined — is specified in the caption of each figure



Les Empotés

ANALYTICAL FRAMEWORK

The analysis of the European reusable packaging dataset was structured around three complementary lenses:

- Readiness and Maturity: assessing both the industry'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. With the contribution of Fost Plus and ConsomAction, this year's edition also piloted a new feature of the Barometer: a country-focused sub-report. In parallel to the European analysis, two national reports dedicated to bulk and reuse in Belgium were published. Building on this experience, we anticipate producing additional country-specific reports in or alongside future editions.

SAMPLE COMPOSITION

The 2025 European Reuse Barometer surveyed 115 reuse companies across Europe. These participating companies span a diverse range of sectors, with the largest representations in retail (43%) and B2C hospitality (27%). Smaller but notable portions of the sample operate in e-commerce (12%), B2B hospitality (11%), and transport packaging pools for industrial supply chains (7%).

While the overall sectoral distribution remains similar to last year's, the 2025 edition includes a higher proportion of companies active in the transport and B2B hospitality sectors. This evolution is a positive sign, indicating that the Barometer is increasingly reaching more mature and operationally advanced industries — those able to provide complementary insights compared to actors from more emerging segments of the reuse market.

WeCarry

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 by consumers to purchase their everyday products (e.g. packaged food, beverages, personal care).
- **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.

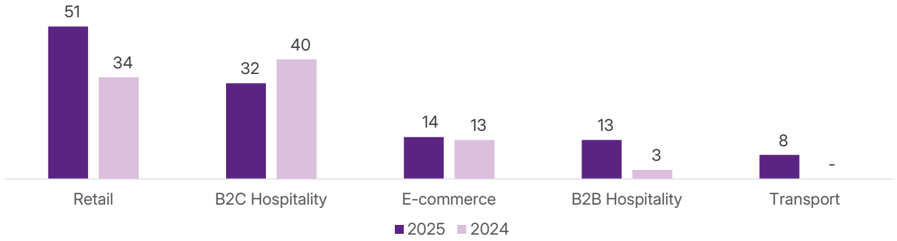


*Figure 1 – **Distribution of companies by sector of activity** (sample: 115 companies surveyed in 2025, 89 in 2024)*

NOTE : Numbers in the graph do not sum to 115 as companies can have several sectors of operation.

Geographically, respondents are headquartered across Europe, with France, Germany, and Belgium among the most represented countries (e.g. 30 French, 25 German, 16 Belgian companies), reflecting strong reusable packaging activity in those markets.

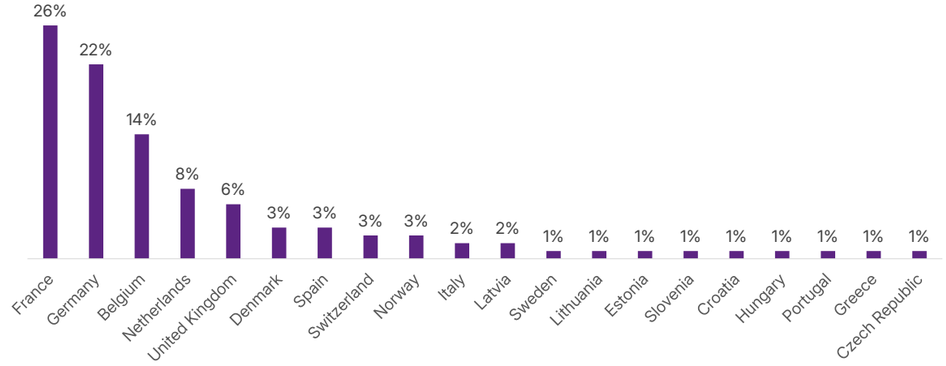


*Figure 2 – **Distribution of companies operating by location of their headquarters** (sample: 115 companies surveyed in 2025)*

The 2025 survey confirms a notable increase in participation from German, Belgian, and Dutch companies, reducing the French bias observed in the previous edition. In future editions, the goal is to continue strengthening outreach and mapping efforts in Central, Southern and Eastern Europe, to understand whether the lower participation reflects a smaller number of actors in those regions or the current limits of our mapping. This will help ensure an increasingly comprehensive view of reuse systems across the continent.

*Figure 3 – **Distribution of companies by their country(ies) of operation** (sample: 108 companies surveyed in 2025, 88 in 2024)*

NOTE : Numbers in the graph do not sum to 108 as companies can have several countries of operation. 60% of surveyed companies are active in just one country, 10% in two countries and 18% in 3 to 5 countries.

Most participating firms are relatively young: 84% were founded after 2015 and 55% after 2020, reflecting respondents still in their structuring phase. This helps explain the relatively modest turnover figures reported in later sections. In our sample, this sharp increase in company creation since 2015 is primarily driven by the retail and B2C hospitality sectors.

The B2B hospitality and transport sectors are less visible on these graphs as these more mature sectors are led by a few very large companies that have been operating for years.

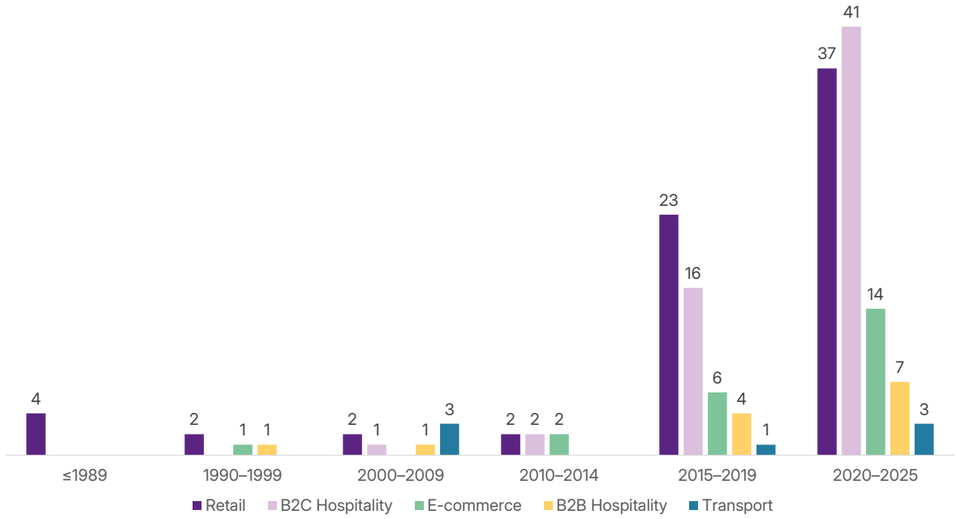


*Figure 4 – **Distribution of companies operating by year of creation and by sector***
(sample: 170 companies surveyed over the last two years)

NOTE : Numbers in the graph do not sum to 170 as several companies operate across different sectors. Because companies can operate in several sectors, the founding year reflects when the company was created — not when each activity began. This is why an e-commerce company appeared in 1990-1999.

Most of the solutions analysed are operationally mature, with over 82% positioned at high Social Readiness Levels (SRL 8-9) — meaning that their systems are deployed and accepted in the market. Few pilot projects appear in the sample, which aligns with the Barometer's focus on operational data rather than early experimentation.

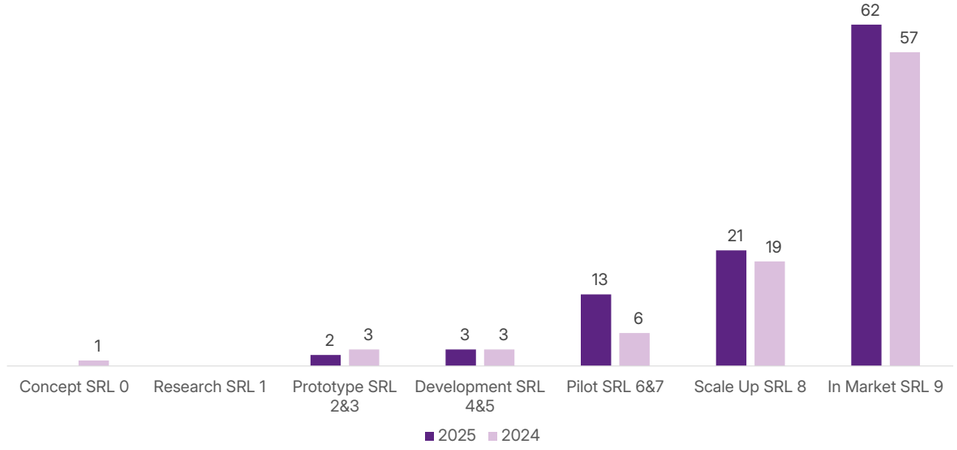


*Figure 5 – **Distribution of companies by their level of Social Readiness Level (SRL)***
(sample: 101 companies surveyed in 2025, 89 in 2024)

Employment levels also point to consolidating companies: most respondents have between 1 and 10 full-time employees dedicated to reuse, a stable trend since 2024, though with a slightly higher share of large organisations employing over 50 FTEs. In general, recruitment plans remain robust: 27% of the surveyed companies plan to hire between 1 to 4 employees within the next two years, 34% between 5 to 9 and 19% between 10 to 24. On average, companies plan to hire 12 employees within two years, confirming an evolving labor market. Recruitments are particularly led by delivery-based models (e.g. "return from home" models where companies deliver and pick-up packaging from home), which anticipate growth driven by the implementation of national and EU-level regulations such as the PPWR.

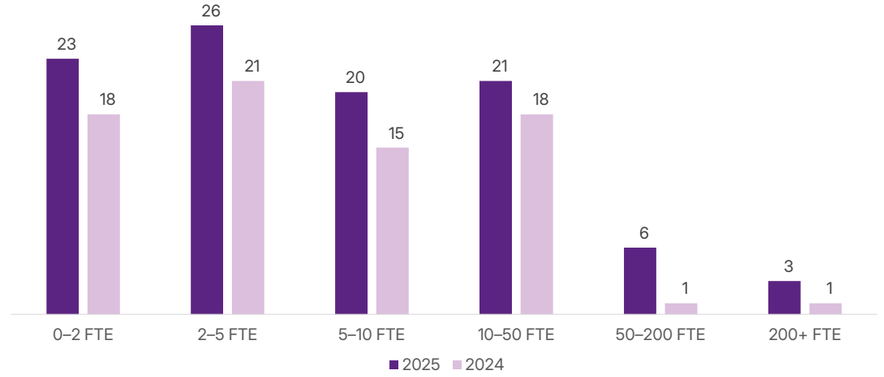


*Figure 6 – **Distribution of companies by number of full-time equivalent (FTE) employees working on reuse activities***
(sample: 99 companies surveyed in 2025, 74 in 2024)

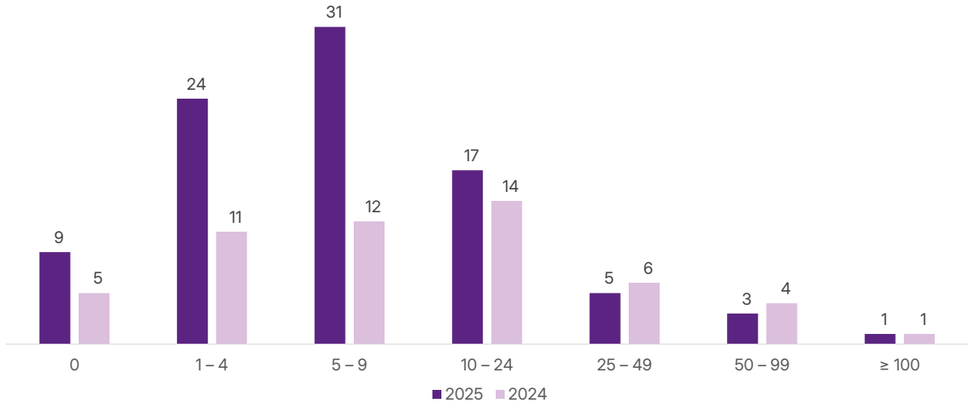


*Figure 7 – **Distribution of companies by number of FTE recruitments planned within the next two years for reuse activities***
(sample: 90 companies surveyed in 2025, 53 in 2024)

KEY FINDINGS

OPERATIONAL PERFORMANCE OF REUSE SYSTEMS

PACKAGING FORMATS & MATERIALS

Across the 212 packaging types analysed, the data shows a clear alignment between packaging format and material choice:

- 100% of reported reusable crates are made of plastic.
- In the retail sector, glass is predominant for 95% of reusable bottles (for beer, wine, etc.) and 78% of reusable jars.
- In the B2C hospitality sector, plastic is predominant with 97% of cups for beverages and 73% of food containers (e.g. takeaway boxes).
- In e-commerce, packaging is made of plastic in 88% of the cases.

Notably, most reuse operators surveyed handle a portfolio of packaging types rather than just one — 66% deal with three or more format categories (for instance, offering cups and food containers and bottles), whereas only 20% deal with a single type. This multi-format approach suggests companies are striving to offer comprehensive reuse solutions across different products. The types of packaging are defined in the Appendix.

NOTE : The type of packaging and material used by a company generally remains stable from one year to the next. To ensure the most comprehensive dataset possible, data from last year's edition has therefore been integrated into this year's analysis for companies that participated previously but did not respond to the 2025 survey.

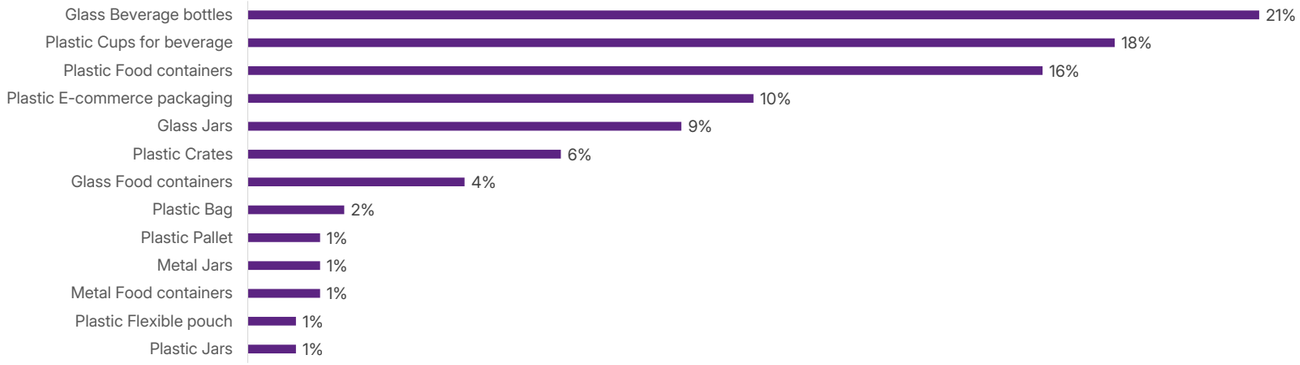


*Figure 8 – **Breakdown of packaging formats and materials used in reuse systems** (sample: 127 companies surveyed over the last two years reporting on 212 packaging types)*

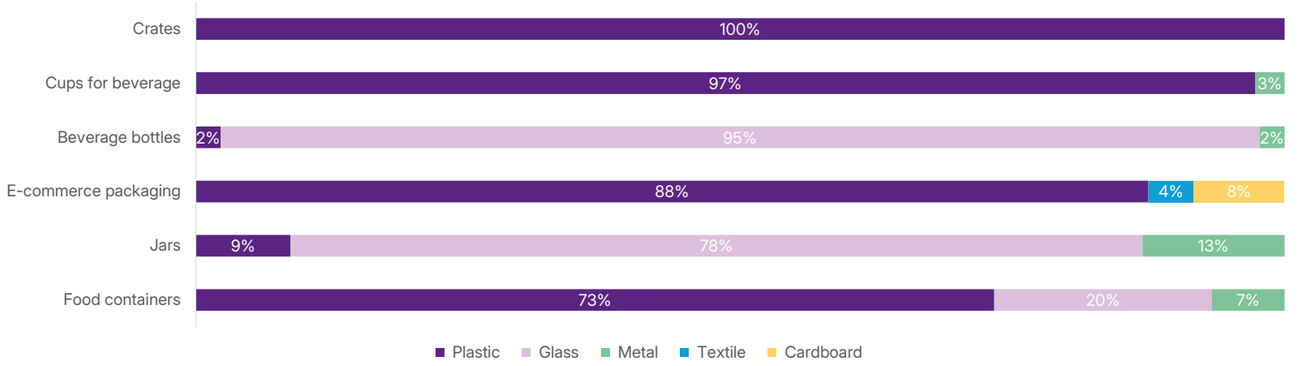
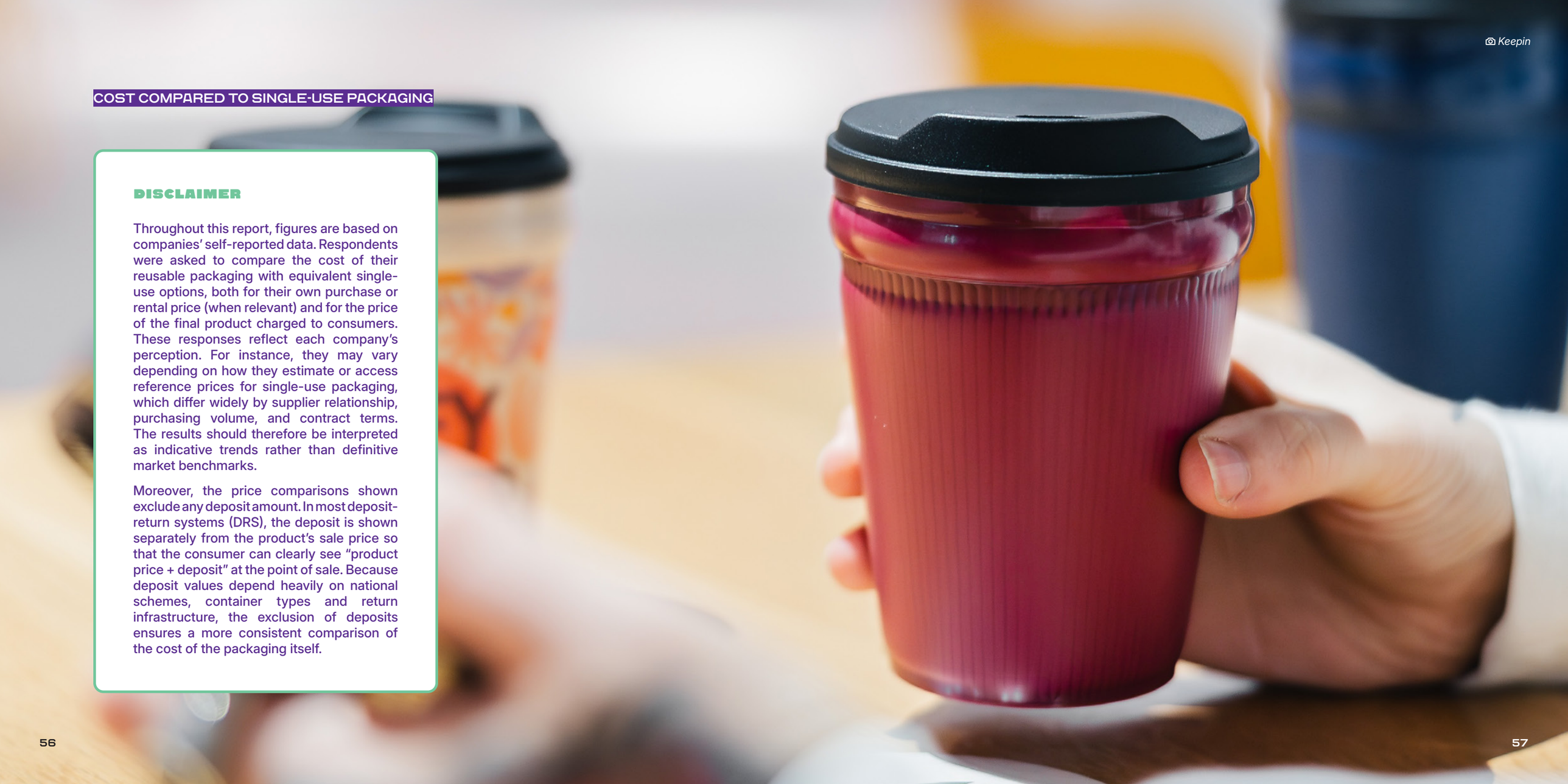


*Figure 9 – **Breakdown of packaging formats by materials used in reuse systems** (sample: 127 companies surveyed over the last two years reporting on 212 packaging types)*



Keepin

COST COMPARED TO SINGLE-USE PACKAGING

DISCLAIMER

Throughout this report, figures are based on companies' self-reported data. Respondents were asked to compare the cost of their reusable packaging with equivalent single-use options, both for their own purchase or rental price (when relevant) and for the price of the final product charged to consumers. These responses reflect each company's perception. For instance, they may vary depending on how they estimate or access reference prices for single-use packaging, which differ widely by supplier relationship, purchasing volume, and contract terms. The results should therefore be interpreted as indicative trends rather than definitive market benchmarks.

Moreover, the price comparisons shown exclude any deposit amount. In most deposit-return systems (DRS), the deposit is shown separately from the product's sale price so that the consumer can clearly see "product price + deposit" at the point of sale. Because deposit values depend heavily on national schemes, container types and return infrastructure, the exclusion of deposits ensures a more consistent comparison of the cost of the packaging itself.

Despite the environmental appeal of reusable packaging, cost remains a major barrier in many cases. Surveyed companies compared their reusable packaging costs to equivalent single-use packaging, and in a majority of cases, reusable packaging is still more expensive on a per-use basis.

- Specifically, for items like beverage bottles, cups, and e-commerce shipping packages, more than 60% of companies reported that the reusable option currently costs more to purchase or rent than the single-use alternative.
- The outlook is a bit more positive for items like jars and food containers where at a bit more than half of respondents said their reusable jars/containers are cost-neutral or cheaper to use than single-use packaging, indicating that reuse can be economically competitive for certain products.
- Long-established reuse formats, notably kegs and industrial crates, already achieve cost parity or savings — indeed, companies like IFCO, Brambles and Fozzy Group communicate on the fact that reusable transport packaging enabled their clients to significantly reduce costs, which is why these systems are standard in B2B logistics.
- Overall, however, aside from those mature systems, under current market conditions, the unit cost of reusable packaging is often higher than throwaway packaging.

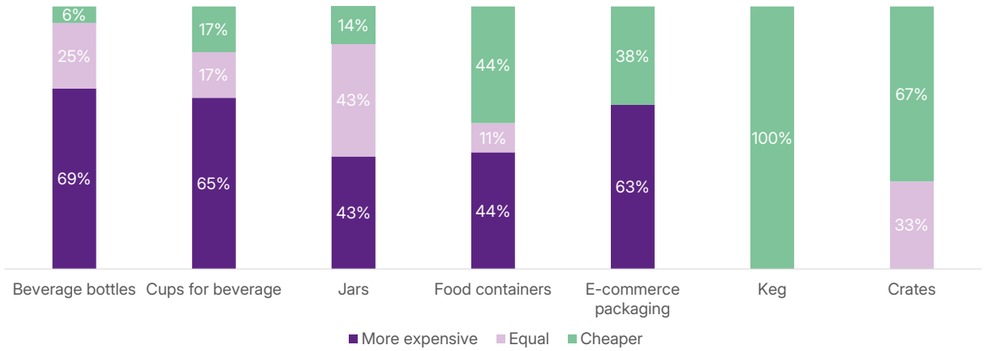


*Figure 10 – **Comparison of the purchase price for companies versus equivalent single-use packaging** (sample: 58 companies surveyed in 2025 reporting on 114 packaging types)*

NOTE : "More expensive" indicates that for a company, the cost of purchasing or renting the reusable packaging is higher than the cost of an equivalent single-use packaging. Conversely, "cheaper" means that for a company, the cost of purchasing or renting the reusable packaging is lower than the cost of an equivalent single-use packaging.

Encouragingly, many of the companies surveyed are not passing these higher costs to consumers in full. In more than half of the cases the products in reuse programs are ultimately sold to the end customer at the same price (or even cheaper) than their single-use equivalent. In other words, companies often absorb the extra expense to avoid penalizing the customer. However, the likelihood of a consumer-facing price premium depends on the sector.

- In B2C hospitality, consumers pay the same or less in half of cases for beverage cups and in two-thirds of cases for food containers.
- In retail, all surveyed companies reported price parity or savings for products sold in reusable glass jars, and two-thirds reported the same for reusable glass bottles.

Premiums paid by consumers still reflect an expensive cost of the reuse logistics (collection, transportation and cleaning) compared to nearly full externalisation of waste management costs in the case of disposables.

En Boîte Le Plat

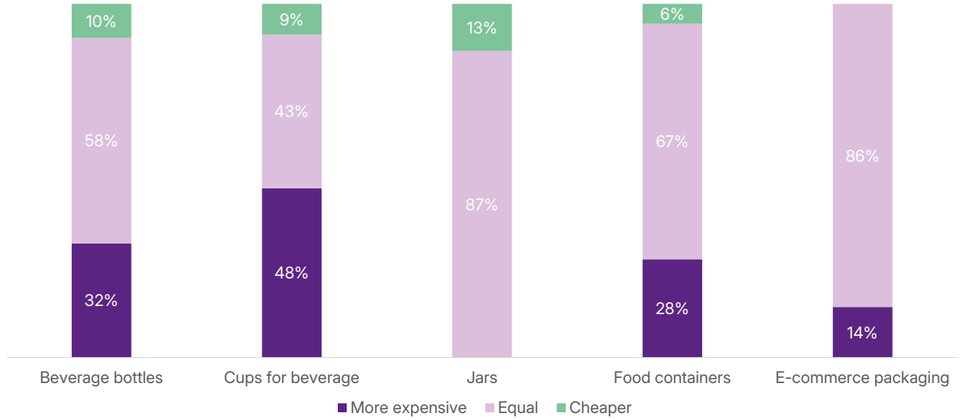


*Figure 11 – **Comparison of the price for consumers of products sold in reusable packaging versus equivalent single-use packaging** (sample: 57 companies surveyed in 2025 reporting over 111 packaging types)*

NOTE : "More expensive" indicates that, for end consumers, the price of a product sold in reusable packaging is higher than the price of the same product sold in single-use packaging. Conversely, "cheaper" means that the price of a product sold in reusable packaging is lower than that of the same product sold in single-use packaging.

These takeaways are confirmed by many firms, among which an e-commerce company that states: "Today it costs more to send back a packaging than to buy a new cardboard. When the cost of return [will end up being lower than the] cost of a single-use cardboard, then we will be able to make some changes." And also by a company in the retail sector: "[Our] biggest issue is that companies and big brands do not want to be first movers, do not want to invest in reusable packaging, and that single-use is still the cheaper option."

The data suggest that companies are not fully passing on their higher operational costs to consumers, and that some consumers continue to choose reusable packaging even when it is priced above single-use alternatives. This indicates that both businesses (and, by extension, their investors) and consumers are partially subsidising reuse systems to ensure their viability. While this reflects a strong commitment among early adopters to support the transition, it also reveals a structural imbalance that is unsustainable in the long run. The sections on Key Barriers and Enablers highlights the support needed to enable reuse to compete on equal footing — beyond goodwill and narrow profit margins.

Ecoscience Provence

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[7]. 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 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 — 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 amortised. In contrast, the price of single-use glass may be more exposed to inflation, energy market fluctuations, and raw material scarcity. Major beverage companies are already moving in this direction: Coca-Cola, for instance, has recently expanded its returnable glass bottle production capacity and announced multimillion-euro investments to scale reusable bottle systems in Europe, signalling growing industry confidence in the long-term cost advantages of reuse. See more here and here.

RETURN RATES

A critical factor in reuse systems is the return rate of packaging — i.e. the percentage of packages that customers return for reuse — and how financial incentives like deposits influence that rate. The survey indicates that return rates are very high in controlled reuse loops and can still be reasonably strong in consumer-facing contexts, but there is still room for improvement.

- In closed-loop B2B systems (such as transport packaging pools or reusable service ware provided to clients under contract with no direct consumer involvement), return logistics are tightly managed and typically achieve near 100% return rates. These high return rates are expected since partners are contractually obligated or have deposits embedded in B2B transactions.
- In consumer-facing reuse systems, the returns rates are a bit lower but still robust, especially when incentives and technology are in place. The best performing sectors are e-commerce and B2C hospitality, where respectively 67% and 58% of companies have return rates higher than 95%. Reuse systems in these sectors are usually able to collect some customer information (e.g. via an app sign-up, or by linking packaging to a phone number/email), which allows them to send reminders and nudges — this significantly boosts returns.

[7] World Economic Forum. “Why reusable packaging must become a commercial priority.” The World Economic Forum, 23 March 2023

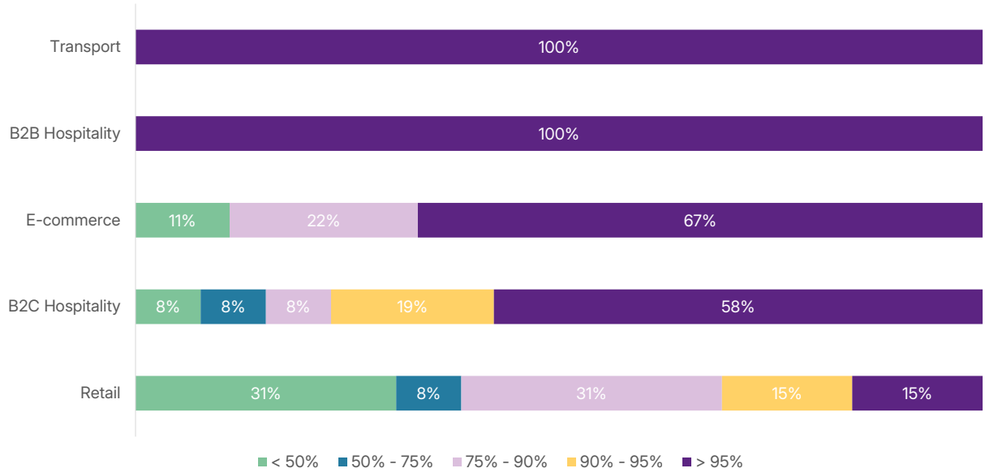


*Figure 12 – **Reported return rates for reusable packaging** (sample: 43 companies surveyed over the last two years reporting on 50 packaging types)*

REUSE CYCLES

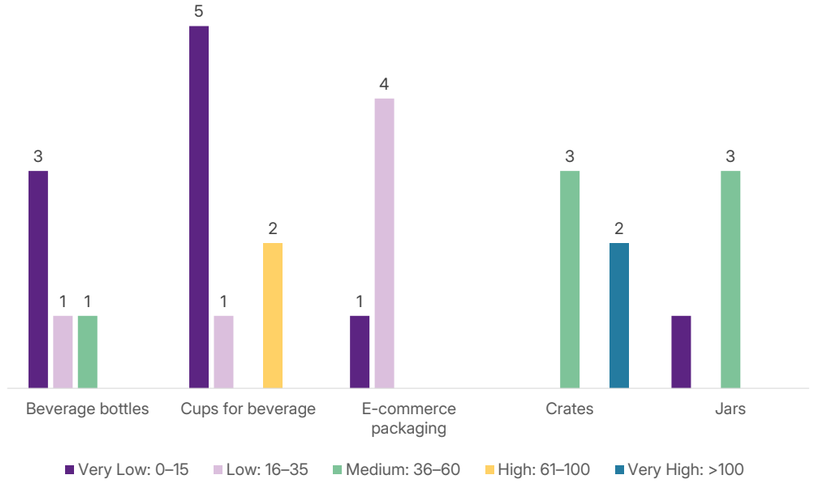


*Figure 13 – **Average number of cycle per packaging formats and materials** (sample: 11 companies surveyed in 2025 reporting over 26 packaging types)*

Reuse cycles — the number of complete rotations a reusable package accomplishes from its initial use to its return for reuse — are a critical indicator of system performance, as they determine both the environmental and economic viability of reuse models. Crates perform best, with an average of 82 cycles, reflecting their long-established durability in B2B logistics. Among consumer-facing formats, beverage cups lead with 30 cycles on average, followed by e-commerce packaging at 24 cycles on average. Beverage bottles achieve fewer rotations with around 19 cycles on average, consistent with higher breakage rates (as usually in glass) and demanding transport and handling conditions.

DEPOSIT INCENTIVES

Deposit and penalty schemes amounts reported between 2024 and 2025 appear to remain relatively stable from one year to the next. To ensure the most comprehensive dataset possible, data from the 2024 edition has therefore been integrated into this year's analysis for companies that participated previously but did not respond to the 2025 survey.

As reuse systems mature, most companies are turning to deposit-refund models — still the most effective way to ensure high packaging return rates. Two main mechanisms coexist:

- Traditional deposit schemes, where consumers pay a small refundable fee at purchase, dominate in retail settings with standardised return points (e.g. reverse vending machines).
- Penalty-based systems, more common in digital or B2C hospitality contexts, temporarily block a payment that is only charged if the packaging is not returned, offering a smoother user experience and allowing higher equivalent incentives for the end users to return the containers.

New Loop

Among surveyed companies, reported deposit or penalty amounts are distributed as follows:

- 28% fall between 0.10€ and 1€,
- 40% between 0.10€ and 2.50€,
- 18% between 2.50€ and 5€,
- 15% above 5€.

Lower deposits (under 1€) are standard in retail applications like beverage bottles or jars to balance affordability and motivation, while higher values — often linked to penalty systems — apply to takeaway packaging such as beverage cups and food containers.

These figures concern B2C packaging only, as B2B and transport systems operate through contractual pooling or leasing, where deposits are internalised within service fees. Overall, consumer-facing deposits remain a key operational and regulatory lever, combining economic incentives with transparency to build consumer trust and achieve consistent return rates across markets.

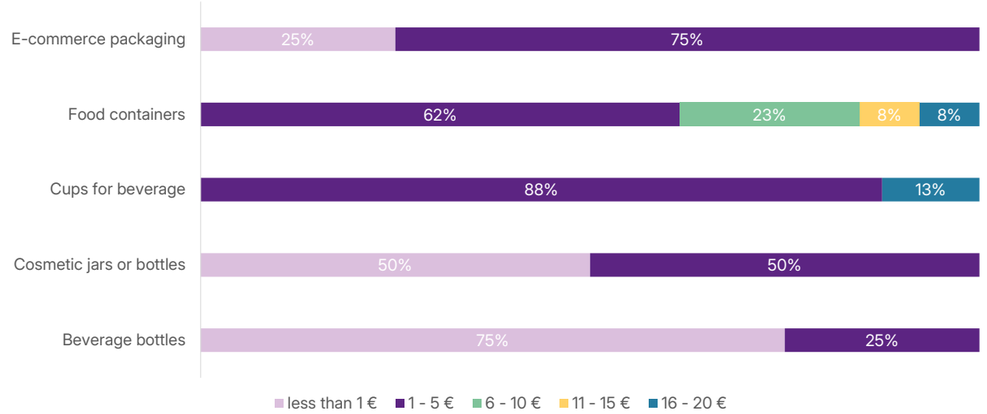


*Figure 14 – **Overview of deposit or penalty amounts applied to reusable packaging for B2C applications** (sample: 33 companies surveyed over the last two years reporting on 40 packaging types)*

SOFTWARE & TECHNOLOGY

Digital technology has become a key enabler of reusable packaging systems, with an increasing number of companies investing in software tools to enhance efficiency, traceability, and user experience. In the 2025 survey, 47 companies provided detailed information on the IT solutions supporting their reuse operations.

Sea Me

UNDERSTANDING THE IT SYSTEMS LISTED IN THIS REPORT

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

- **Stock management and asset tracking** (91% of companies), primarily via QR codes (74%) and RFID (41%) or both (33%), ensuring real-time visibility of packaging flows and preventing losses.
- **Deposit payment and penalty system**, used respectively by 60% and 26% of companies, automating refunds or penalties to drive high return rates.
- **Transport and trip coordination**, applied by 6%, optimising logistics between collection, washing, and redistribution sites.
- **Loyalty and engagement tools**, used by 4%, incentivising consumers to return or reuse packaging.

A few solutions also integrate analytics dashboards or API connections with external systems (Application Programming Interface: software tools that enable automatic data exchange with retailers' IT systems, logistics platforms, or deposit management tools), though these features — common in many industries — were not analysed further. The growing use of automation and data tools reflects the industry's shift toward real-time traceability and operational efficiency.

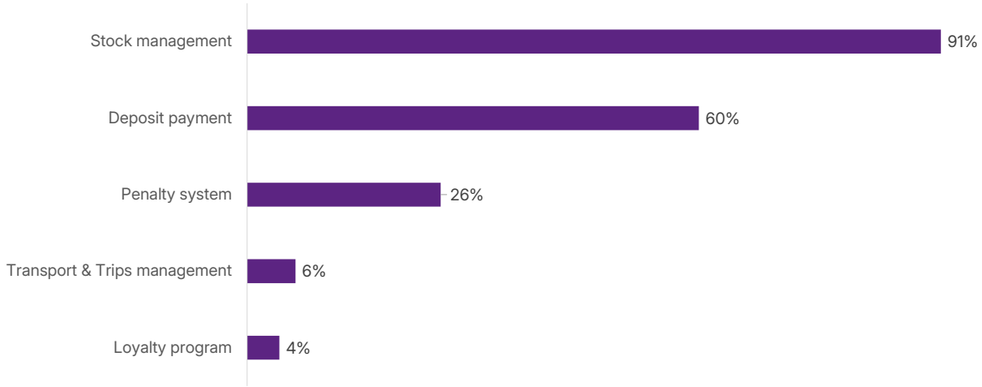


*Figure 15 – **Types of software and digital tools used by companies** (sample: 47 companies surveyed in 2025)*

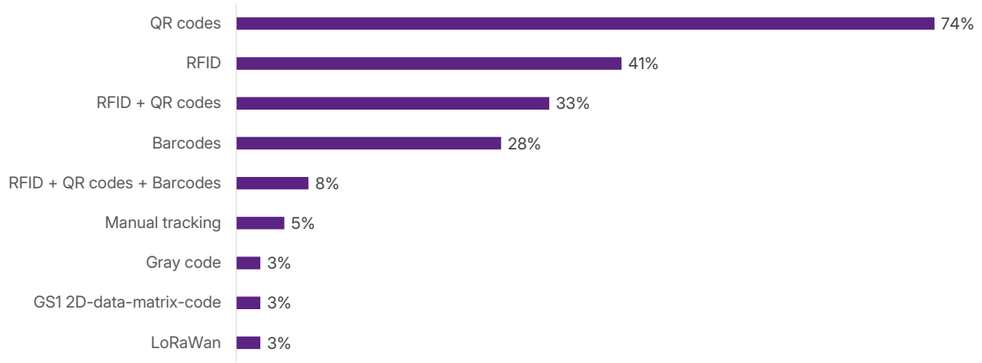


*Figure 16 – **Adoption rate of tracking technologies for reusable packaging** (sample: 39 companies surveyed in 2025)*

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

Looking ahead, companies expect AI and computer vision to further streamline operations by automating quality checks and improving return rates. As one B2C hospitality provider noted, "AI-powered computer vision technology for automated packaging quality control will revolutionise operational efficiency."

Technology is also enabling greater interoperability. Integration with Deposit Management Organisations (DMOs) and national deposit-return schemes is seen as the next step, allowing seamless tracking and compliance across EU markets. Some respondents anticipate city-scale reuse systems, digitally connecting consumers, businesses, and municipalities.

Overall, companies agree that "digitalisation makes reuse seamless, scalable, and trusted." From smart deposits to IoT-enabled tracking, technology is transforming reuse companies into data-driven operators — reducing costs, improving convenience, and providing the verified impact data needed to secure investment and regulatory support.

Borro's case study below illustrates how digital solutions 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.

Sykell

Borro

CASE STUDY – BORRO: 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:

- The return rate reached 93%, and the number of cups produced decreased significantly;
- Staffing needs at return points dropped by one-third;
- Fraud losses fell by an estimated 10,000€ per year;
- Refund transaction fees decreased by 5,000€ annually;
- 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.

TURNOVER, GROWTH, PROFITABILITY AND FUNDING

TURNOVER & GROWTH

DISCLAIMER

Many companies were cautious about disclosing turnover, as this data is sensitive. Consequently, the sample's turnover data (35 companies) might not fully represent each sector's reality. For instance, the transport packaging and B2B beverage reuse sectors are known to include some very large, established players (such as IFCO, CHEP, or big beverage companies like Coca-Cola who run reusable bottle programs). These firms have significant turnover from reuse but did not respond to the survey, meaning that the survey's turnover breakdown skews toward smaller startups.

Financially, the surveyed reuse companies vary widely in size, but the majority are relatively small enterprises in revenue terms:

- 28% are startups / micro companies (<100K€)
- 38% are small companies (100K€ to 1m€)
- 21% are medium companies (1m€ to 10m€)
- 13% are large to very large companies (>10m€)

The transport and B2B hospitality sectors that did respond showed higher revenues on average (consistent with being more mature), while retail and e-commerce reuse respondents were generally on the smaller end.

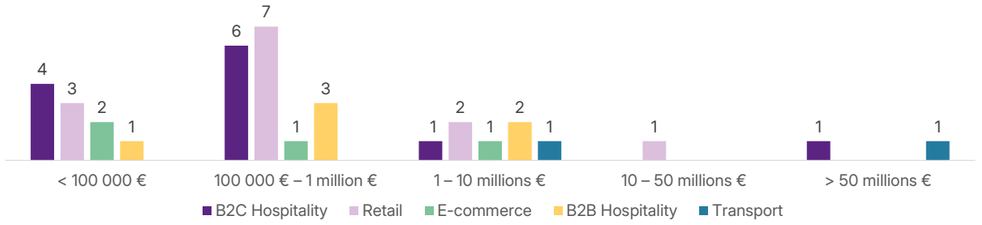


*Figure 17 – **Distribution of companies by turnover from reuse-related activities, by sector** (sample: 37 companies surveyed in 2025)*

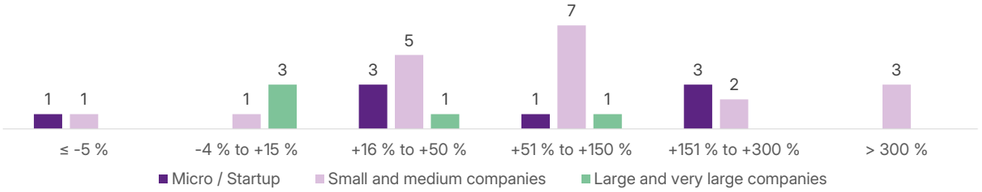


*Figure 18 – **Year-on-year turnover growth from reuse-related activities between 2022 and 2024 or between 2023 and 2024** (sample: 32 companies surveyed in 2025 that provided turnover data for 2022–2024 or 2023–2024)*

NOTE : Categories are based on annual turnover: micro/startups (<100K€), small and medium companies (100K€ to 10m€), and large and very large companies (>10m€).

On average, the expected growth rate across respondents has been around 11% annually in revenue terms (weighted by company size) from 2023 to 2024. This is a healthy growth rate, and significantly, the smallest startups projected the highest growth (nearly 89% per year for the micro segment, 33% for small and medium companies and 7% for large and very large companies) — reflecting that many are starting from a low base but see potential for a sharp ramp-up. As an e-commerce company states: "growth is very fast now, but it's still from a small base"

Respondents' growth is forecasted to continue increasing as respondents show strong optimism, with 94% of companies reporting either moderate or rapid expected growth in the next five years. No respondents indicated decline. Expected growth is most dynamic in transport packaging, where 67% of companies report expected rapid expansion. Even the more challenging retail and e-commerce segments show clear upward momentum.

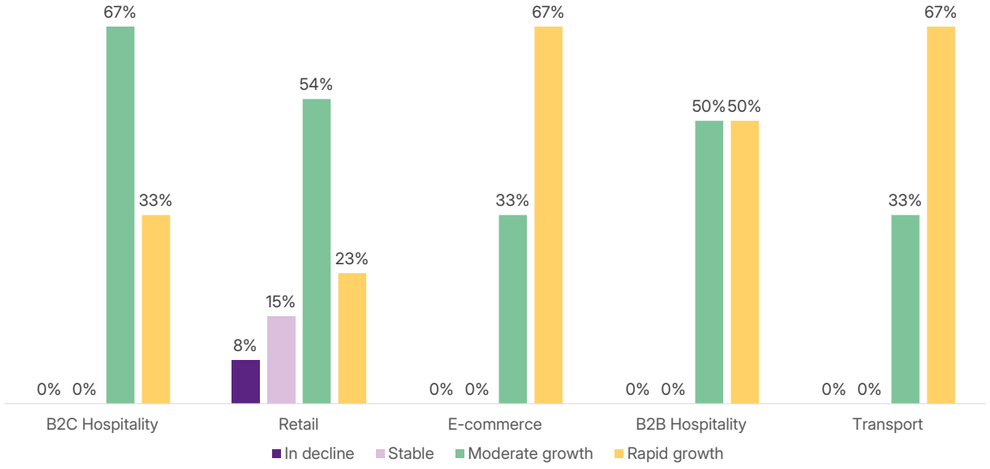


*Figure 19 – **Expected development of reusable packaging in each sector over the next 5 years** (sample: 103 companies surveyed in 2025)*

In summary, while current turnovers are often low, growth trajectories are strong. All sectors anticipate further scaling as reuse systems mature and new legislation — such as the PPWR — drives market adoption. Reuse solution providers are scaling their operations, expanding to new markets and clients, and investing in staff and technology with the confidence that reuse will become mainstream. Their aim is to reach the volumes needed for financial sustainability.

COMPANIES' PROFITABILITY

The survey asked whether companies' reusable packaging activities generated a positive operating margin in 2024. The results are aligned with last year: more than half of the respondents (53%) are profitable, meaning that achieving profitability remains a work in progress for many reuse businesses.

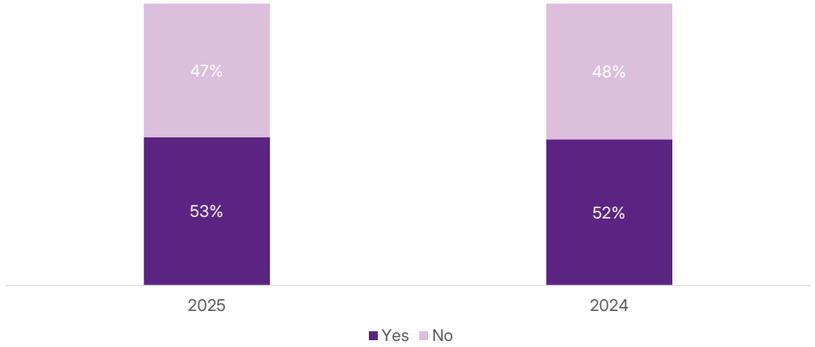


*Figure 20 – **Share of companies whose reuse activities generated a positive operating margin in 2024** (sample: 96 companies surveyed in 2025, 87 in 2024; results showing results "Information not available or not applicable" have been excluded)*

Profitability closely mirrors the maturity of each sector. Transport packaging stands out as the most profitable segment, with most pooling and logistics providers already achieving positive margins. These are typically long-established or larger companies, often operating reuse as part of broader, profitable supply-chain activities. B2B hospitality follows a similar pattern, supported by major beverage suppliers and stable demand.

In contrast, companies operating in retail and e-commerce remain the least profitable. Their challenge lies in competing with cheap, convenient single-use cardboard, which, in the case of e-commerce, is still exempt from EU reuse targets under the PPWR. This regulatory gap, coupled with limited market demand, makes scaling difficult. As two companies explained: “Our turnover is increasing every year, but we still need greater stability to secure jobs and future investments,” and “We could be profitable already if regulation pushed more customers to reuse.” Check out the case study below for more insights from transport and e-commerce reuse companies.

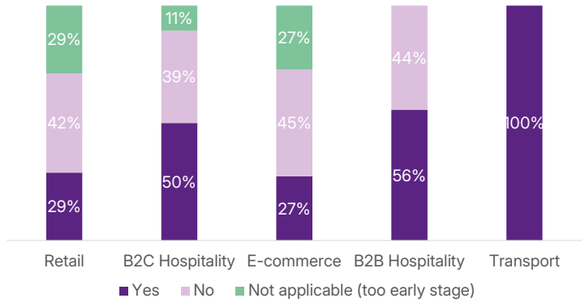


*Figure 21 – **Share of companies whose reuse activities generated a positive operating margin in 2024, by sector of activity** (sample: 96 companies surveyed in 2025)*

Despite current struggles, 61% of yet unprofitable companies expect to reach profitability within three years, driven by scaling and efficiency gains. As one operator noted, they must “reach higher economies of scale to bring down the costs related to cleaning and logistics.”

Pandobac - Léa Boeglin

CASE STUDY – PANDOBAC: MAKING REUSE EFFICIENT AND PROFITABLE

Pandobac offers a turnkey reusable packaging service for the food industry (wholesalers, manufacturers, and distributors). It manages the rental, tracking, washing, and reverse logistics of reusable crates used for transporting goods between businesses.

Its tracking platform, connected to ERPs (Enterprise Resource Planning systems that centralise a company’s operations such as inventory, finance, and logistics) and automated systems via an API (Application Programming Interface: software tools that enable automatic data exchange with retailers’ IT systems, logistics platforms, or deposit management tools), enables full control of rotation rates, minimises losses — the main cost driver in reuse — and optimises the management of logistics flows.

Economic impact and additional benefits

The Pandobac model is economically viable and quickly becomes profitable beyond a certain activity volume, thanks to several optimisation levers:

- scaling up volumes to reduce logistics and washing costs,
- precise return tracking to avoid crate loss and repurchase,
- optimised rotation times to limit immobilisation of crates.

Clients achieve up to 30% cost savings, along with operational benefits such as reduced handling time, fewer product losses thanks to the robustness of crates, and better ergonomics that help reduce repetitive strain injuries. It has also become a competitive advantage for suppliers looking to meet the growing demand from retailers and restaurants for responsible solutions.

To date, over 2 million crates have been reused through Pandobac with a return rate above 98%. Thus, Pandobac demonstrates that a reuse system can be both sustainable and economically competitive: a credible alternative, ready to be scaled up.

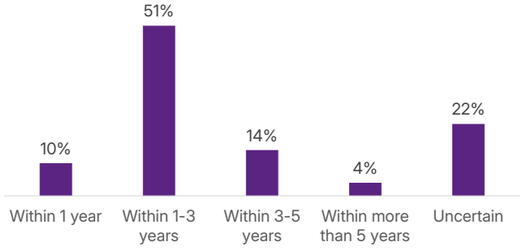


*Figure 22 – **Anticipated timeline for companies to reach a positive operating margin from their reuse activities** (sample: 51 companies surveyed in 2025; only includes companies that have not yet reached profitability)*

The coming years will therefore be decisive. Momentum and growth are vital for reuse systems to achieve financial sustainability. Without support during this transition, many early movers risk exiting the market before reaching scale. As one retailer warned, "without public support during these years, many startups might disappear before reaching the scale they need."

[8] The Cool Down. "Amazon announces new packaging trial that could change your future deliveries: 'The biggest single test we've ever conducted.'" The Cool Down, 26 11 2024

[9] Praxpack. "User-integrated development and testing of business models for reusable packaging solutions in online retailing."

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

companies 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 1.50€ — 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[8].

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[9]. 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. However, several companies warn that by exempting cardboard boxes from reuse targets, the PPWR is refraining the development of reusable solutions for e-commerce. As one respondent put it, "excluding cardboard boxes from the reusable quota makes the entire regulation toothless for the e-commerce industry" and another noted that "because cardboard is excluded from the reuse requirements, the largest webshops are not switching to reusable packaging".

ACCESS TO FUNDING

Given the profitability gap for many, access to capital remains essential. About 59% of companies have raised or plan to raise funds to support their growth, with an average of 4.3m€ raised or planned per company — broadly consistent with last year's figures (4.1m€). Funding levels vary widely: most (51%) raised under 2.5m€, while only 10% exceeded 10m€.

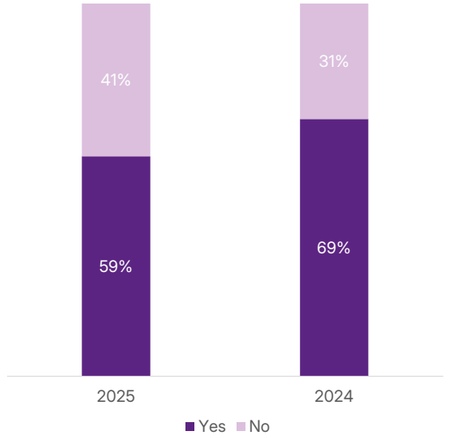


*Figure 23 – **Companies that have raised funds in recent years and/or plan to raise funds in the next five years** (sample: 100 companies surveyed in 2025, 88 in 2024)*

Most reuse businesses surveyed remain early-stage ventures: nearly 75% are in pre-seed or seed, and only a handful have reached series A or B. This is consistent with modest initial capital expenditures (CAPEX), as 82% invested under 1m€ at launch. The respondents are thus mostly small, fast-growing startups still testing and scaling their business models.

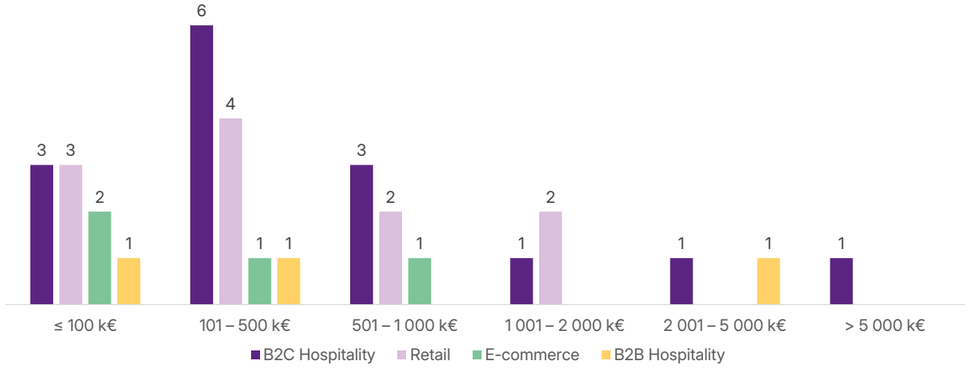


*Figure 24 – **Distribution of companies by amount of capital expenditures (CAPEX) invested at the launch of their reuse operations** (sample: 33 companies surveyed in 2025)*

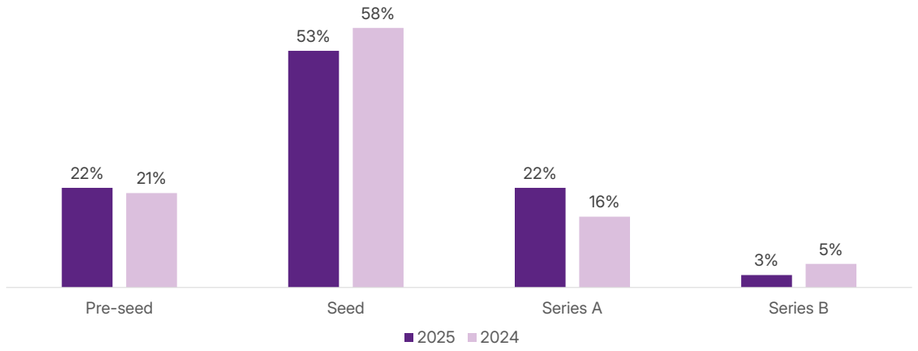


*Figure 25 – **Distribution of companies by their funding stage** (sample: 36 companies surveyed in 2025, 38 in 2024)*

UNDERSTANDING THE FUNDING STAGES LISTED IN THIS REPORT

The funding stage reflects a company's level of maturity and how far its business model has evolved — from early testing to commercial expansion. The repartition below shows that most reuse companies remain in early development phases.

- **Pre-seed (22%)** – very early creation phase, funded mainly by founders, small grants, or friends and family.
- **Seed (53%)** – start-ups validating their models and attracting early-stage venture or public innovation funds.
- **Series A (22%)** – companies expanding commercially and raising several million euros for growth.
- **Series B (3%)** – mature ventures scaling nationally or internationally with larger funding tickets.

Overall, the 2025 results are consistent with 2024, with the majority of reuse businesses surveyed still concentrated in pre-seed and seed stages, confirming a young and developing market that continues to require patient capital and a supportive public.

Funding sources reflect this early-stage structure. Public grants remain the main lifeline (51% of all external funds), followed by bank loans (23%) and private investment (19%). Crowdfunding and EPR-related mechanisms remain marginal. The heavy reliance on public support highlights the need for continued subsidies and policy-driven incentives to bridge profitability gaps.

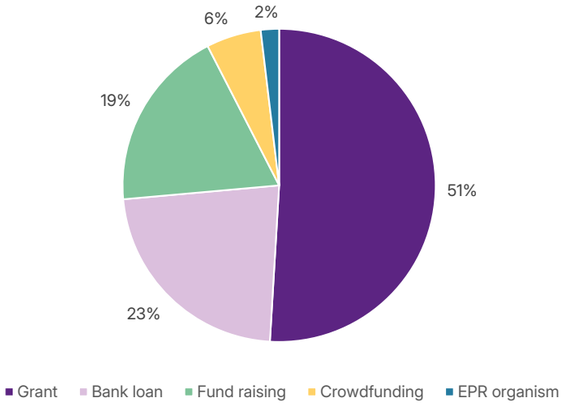


*Figure 26 – **Share of companies that have received external funding** (grants, loans, equity, or donations), by source (sample: 43 companies surveyed in 2025)*

Yet, raising capital remains difficult for the companies surveyed. Entrepreneurs cite investors' skepticism and regulatory uncertainty: "Investors still don't understand the potential of reusable packaging" (e-commerce) and "Private investors are hesitant until they see a clear regulatory push" (retail). Others stress the mismatch with short-term investment models: "The payback period is longer than what most investors expect" (B2C hospitality).

Despite these hurdles, companies showing clear traction continue to attract impact funds and strategic investors. As regulations like the PPWR create stronger market signals, larger rounds are expected to follow. Until reuse economics mature, public programs remain crucial to de-risk investment and ensure the industry's scaling momentum.

MARKET OUTLOOK AND ENABLING CONDITIONS

While earlier chapters focus on firm-level indicators such as turnover, profitability, and funding, this section examines the external drivers enabling reuse to further scale. It provides an essential outlook for interpreting the industry's growth potential and identifying the systemic levers needed to accelerate the transition from emerging initiatives to mainstream adoption.

INDUSTRY'S PERCEIVED MATURITY AND BARRIERS

88% of firms surveyed see the reuse market as still in development (either "emerging" or "growing"), with only 12% of respondents reporting it as being established.

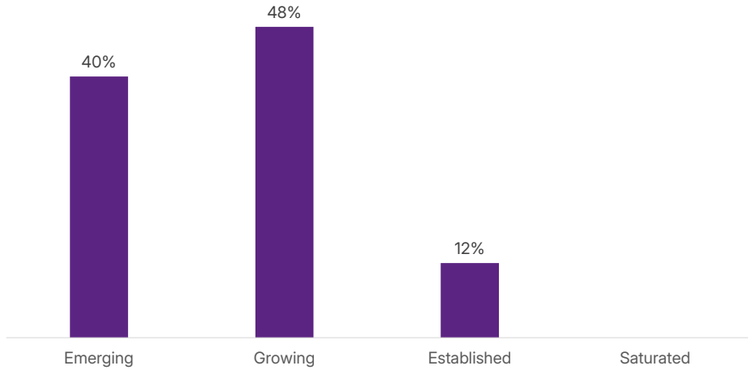


*Figure 27 – **Perceived maturity of the reusable packaging industry** (sample: 104 companies surveyed in 2025)*

The results are relatively consistent across sectors. Even in the more mature sectors dominated by large corporations (B2B hospitality and transport), only a small share consider their sector to be established (8% and 20%, respectively), and none view it as saturated. The e-commerce sector appears as the youngest and least mature, with 77% of respondents describing it as emerging, reflecting its ongoing experimentation and rapid evolution

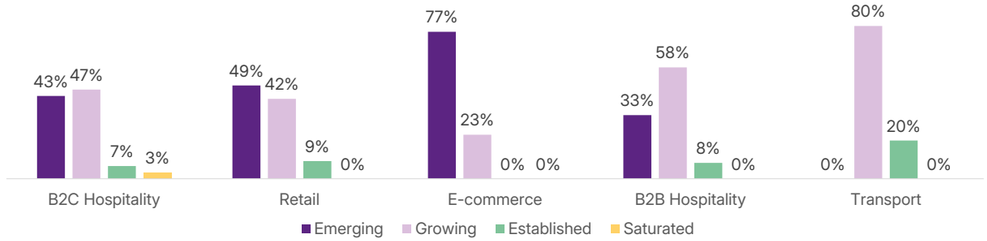


*Figure 28 – **Perceived maturity of the reusable packaging industry, by sector** (sample: 94 companies surveyed in 2025)*

Among countries with the highest number of responses, Germany is perceived by respondents as the most established market, followed closely by Belgium (respectively 35% and 13% seeing the market as "established").

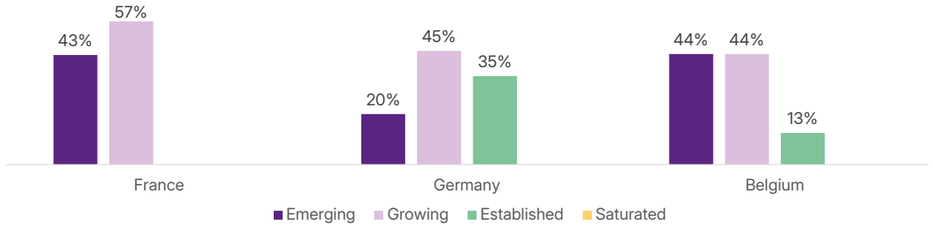


*Figure 29 – **Perceived maturity of the reusable packaging industry** (sample: 66 companies surveyed in 2025; countries shown are those with the highest number of responses: 30 companies headquartered in France, 20 in Germany, 16 in Belgium)*

Respondents still identify clear obstacles to the planned growth. The top three concerns are:

1. **Low consumer adoption (29%)**, as convenience continues to favor single-use;
2. **Regulatory gaps and lack of enforcement (25%)**, which weaken investor and market confidence;
3. **High investment and operational costs (19%)**, due to packaging, washing, and logistics expenses;
4. **Limited supply chain integration (19%)**, linked to the lack of standardisation and collaboration.

The two first points are closely connected: in the absence of strong regulation and effective enforcement, neither companies nor consumers feel sufficiently pushed to shift away from single-use, which ultimately slows adoption of reusable packaging.

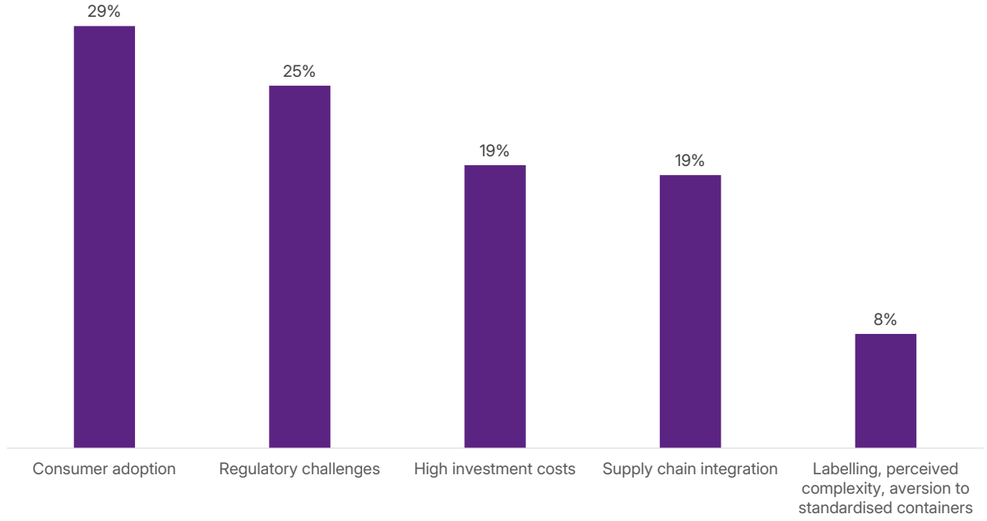


*Figure 30 – **Main barriers to scaling reusable packaging solutions by sector of activity** (sample: 101 companies surveyed in 2025)*

This lack of consumer adoption is reflected in the underutilisation of cleaning facilities reported by 39 companies:

- 28% operate at 2–10% of capacity
- 26% operate at 11–25%
- 15% operate at 26–45%
- 26% operate at 46–65%
- 5% operate at 66–100%

Overall, 70% of surveyed companies currently use only 2–45% of their cleaning capacity, indicating substantial room for scale-up. These operators have already invested in infrastructure and are technically prepared to serve higher demand — but are waiting for market uptake to grow.

Among sectors with the highest number of responses, B2C hospitality suffers even more than retail from the lack of consumer adoption and regulatory challenges, as customer habits remain difficult to shift and policy enforcement uneven.

*Figure 31 – **Main barriers to scaling reusable packaging solutions, grouped by sector of activity** (sample: 73 companies surveyed in 2025; sectors shown are those with the highest number of responses: 43 in Retail, 30 in B2C hospitality)*

Kegs United

These quantitative findings are confirmed by qualitative feedback. One B2C hospitality actor described Europe as “a very hard throw-away society that is not adopting reusables,” while another noted that industrial reuse “requires the collaboration of the value chain,” which remains “sporadic instead of systematic.” The case of Pyxo detailed in last year’s edition, forced into receivership in 2024, illustrates the impacts of weak policy enforcement and slow market adoption.

ENABLING DRIVERS TO ACCELERATE REUSE MATURITY

43% of companies indicate that policy progress and enforcement is the strongest driver of optimism to raise the mentioned barriers and finally bring reusable packaging solutions to scale.

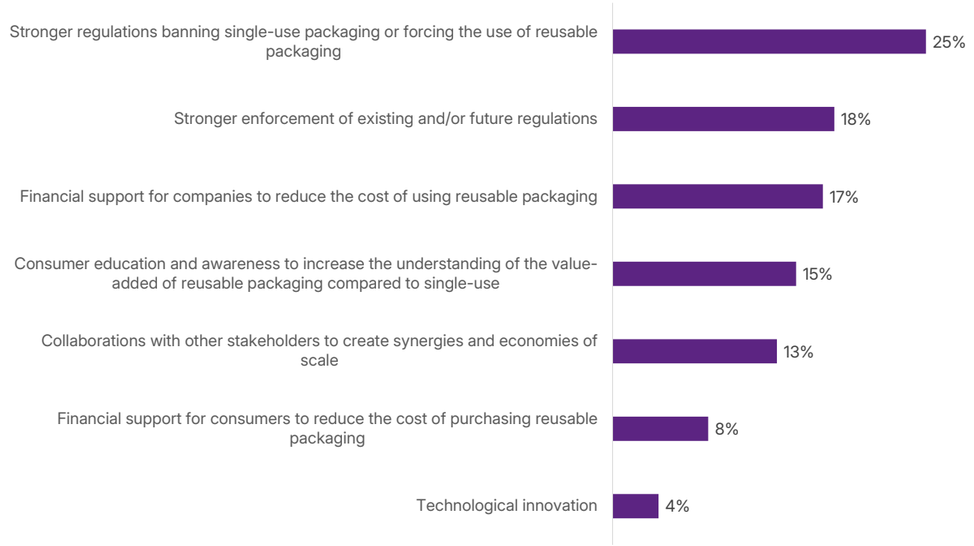


*Figure 32 – **Types of support that would most benefit companies active in reusable packaging** (sample: 100 companies surveyed in 2025)*

Concerning regulations, the EU Packaging and Packaging Waste Regulation (PPWR), adopted in late 2024 and effective by mid-2026, introduces the first binding reuse and refill targets across Europe. However, partial exemptions, particularly for cardboard, and the lack of harmonised enforcement still limit its impact. It is viewed positively by respondents: around half of them consider it to be somewhat or very supportive for the industry.

At the national level, France’s AGEC law, Germany’s reuse requirement for takeaway packaging, and the rollout of Deposit Return Schemes (DRS) in several countries are creating tangible momentum. As one reuse provider noted, these initiatives are “creating additional momentum for reuse solutions, with governments looking for partnerships to ensure DRS systems work at scale.”

Despite this progress, most respondents still find national frameworks only moderately supportive. Across Europe, 40% consider them somewhat or very supportive, while the majority perceive a neutral or weak environment.

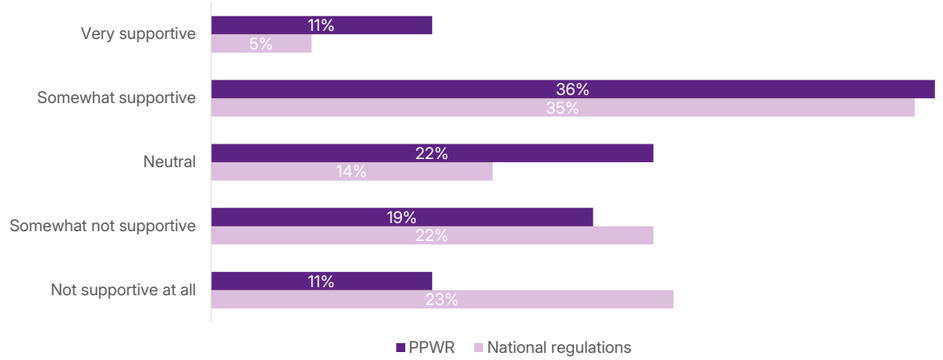


*Figure 33 – **Comparison of the perceived level of support from the national regulatory environment and the Packaging and Packaging Waste Regulation (PPWR) for the reusable packaging industry** (sample: 99 companies surveyed in 2025)*

Among major respondent countries, France shows slightly higher optimism, but 78% of businesses across France, Germany, and Belgium describe their national context as neutral or not supportive enough, insufficient to drive a market shift.

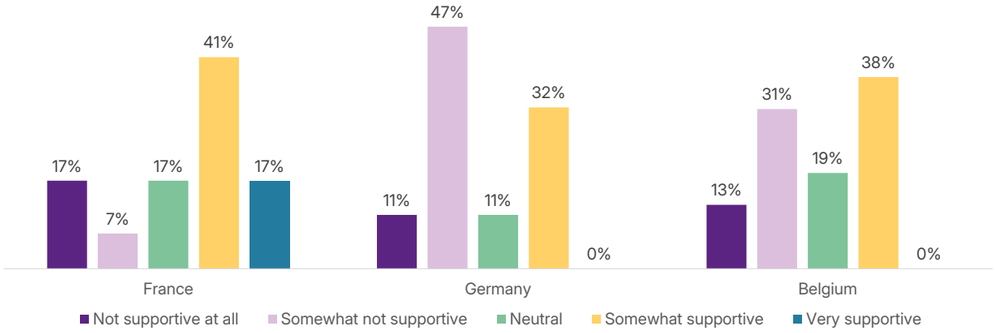


*Figure 34 – **Perceived level of support from the national regulatory environment for the reusable packaging industry** (sample: 64 companies surveyed in 2025; countries shown are those with the highest number of responses: 29 companies headquartered in France, 19 in Germany, 16 in Belgium)*

The Keepers

Lyreco Norway

These findings indicate that companies see the EU regulation as raising the bar for reuse across Europe. Since the PPWR is a directly applicable Regulation, it will enter into force in August 2026, establishing a harmonised minimum standard for all Member States to help them achieve the ambitious packaging waste reduction objectives laid out in article 43. Yet stakeholders increasingly acknowledge that, on its own, the PPWR's measures are unlikely to deliver the required shift. The elaboration of robust complementary national laws will therefore be decisive to help EU countries achieve these targets, and leverage the full potential of reusable packaging systems.

In addition to regulation, companies highlight other forms of support that could accelerate the adoption of reuse systems:

- **Financial assistance for businesses** (17%) is seen as critical to offset the higher costs of reusable packaging — consistent with findings in the Funding section, which underline the continued need for public support mechanisms.
- **Consumer education and awareness campaigns** (15%) are also viewed as essential to complement legislation and address current gaps in demand. While early adopters have already joined reuse schemes, broader market uptake will depend on effectively informing consumers or, where needed, creating stronger regulatory incentives.
- **Enhanced collaboration among stakeholders** (13%) is another key priority, aimed at fostering synergies and economies of scale. Companies call for greater alignment around shared, interoperable packaging formats to reduce costs and simplify logistics, as well as closer cooperation with Deposit Management Organisations (DMOs) and public authorities to integrate reuse within emerging Deposit Return Schemes (DRS) and national waste-prevention policies.

Together, these priorities reflect respondents entering a scale-up phase, where supportive legislation, financial incentives, and cross-sector partnerships can transform reuse from niche innovation into a mainstream business reality.

CONCLUSION

ACCELERATING THE TRANSITION TO REUSE IN EUROPE

INDUSTRY MOMENTUM AND MARKET OUTLOOK

The 2025 European Reuse Barometer reveals a fast-evolving ecosystem: 94% of surveyed companies report moderate to rapid growth, with the majority expecting profitability within five years. They remain young, most companies were founded after 2015 — and diverse, spanning consumer-facing systems (e.g. retail, B2C hospitality) and, to a lesser extent, mature B2B formats (e.g. transport packaging, kegs). Profitability correlates strongly with the respondents' maturity: transport and B2B hospitality systems are more often financially viable, while retail and e-commerce actors still struggle with high costs and limited uptake. Nevertheless, optimism is high, underpinned by scaling ambitions and innovation.

KEY BARRIERS AND ENABLERS

The main hurdles remain consistent — low consumer adoption, high operational costs, and lack of regulations and enforcement — challenges reported primarily in B2C sectors, where most survey responses are concentrated, and only to a lesser extent in B2B . Many companies have built strong reuse infrastructure, yet face underutilisation due to weak demand — a pattern clearly reflected in cleaning operations, where 70% of surveyed companies report running at only 2–45% of their installed capacity. Respondents emphasise that regulation and consumer incentives are essential to break the cost/convenience imbalance compared to single-use. Companies call for shared infrastructure, standard packaging formats, and better supply chain integration. Collaboration and interoperability are key enablers.

INNOVATION AND INVESTMENT TRENDS

Digitalisation, packaging standardisation, and automation are reshaping the industry. From QR-based tracking to AI-powered cleaning systems, technology is making reuse more scalable and transparent. Still, most firms remain in early funding stages — 75% are in pre-seed or seed — with 59% planning to raise capital. Public support plays a critical role: 51% of funding comes from grants, reflecting the respondents' early-stage nature and the need for continued policy and financial backing.

Dotch

POLICY AND REGULATION

Policy remains the strongest catalyst for change. The upcoming EU Packaging and Packaging Waste Regulation (PPWR) is seen as a turning point, offering harmonised definitions, key requirements and even mandatory reuse targets for transport, grouped and beverage packaging across Europe from 2026 onward. Yet companies stress that it is not sufficient on its own: partial exemptions and weak enforcement limit its impact, with only about half of respondents viewing it as supportive. Likewise, national regulations are still perceived as only moderately supportive until now. Stakeholders stress the need for clearer enforcement, more ambitious national action, and alignment between EU and Member State strategies.

CALL TO ACTION

To scale reusable packaging and achieve environmental impact at scale, coordinated effort is required:

- Public authorities must swiftly implement and enforce reuse mandates, fund and enable the development of shared infrastructure (including in public spaces where needed), and embed reuse into public procurement with the right design requirements to ensure maximum performance, convenience and safety.
- Industry and reuse providers should deepen collaboration, co-invest in shared logistics, advocate for additional supportive measures, and improve user experience.
- Investors must provide patient capital and support emerging business models that align with evolving regulation.
- Consumers and civil society must reinforce demand through advocacy, participation, and education.

With the right mix of regulation, infrastructure, funding, and cultural shift, reuse can move from niche to norm. The building blocks are in place: now is the time to scale reuse across Europe.

APPENDIX

DEFINITIONS

PACKAGING-LINKED DEFINITIONS

PACKAGING (PPWR)

An item, irrespective of the materials from which it is made, that is intended to be used by an economic operator for the containment, protection, handling, delivery or presentation of products to another economic operator or to an end user, and that can be differentiated by packaging format based on its function, material and design, including:

a. an item that is necessary to contain, support or preserve a product throughout its lifetime, without being an integral part of the product, and which is intended to be used, consumed or disposed of together with the product;

b. a component of, and ancillary element to, an item referred to in point (a) that is integrated into the item;

c. an ancillary element to an item referred to in point (a) that is hung directly on, or attached to, the product and that performs a packaging function, without being an integral part of the product, and which is intended to be used, consumed or disposed of together with the product;

d. an item that is designed and intended to be filled at the point of sale in order to dispense the product, which is also referred to as 'service packaging';

e. a disposable item that is sold and filled or designed and intended to be filled at the point of sale and which performs a packaging function;

f. a permeable tea, coffee or other beverage bag, or soft after-use system single-serve unit that contains tea, coffee or another beverage, and which is intended to be used and disposed of together with the product;

g. a non-permeable tea, coffee or other beverage system single-serve unit intended for use in a machine and which is used and disposed of together with the product;

PLASTIC (PPWR)

A material consisting of a polymer within the meaning of Article 3, point (5), of Regulation (EC) No 1907/2006, to which additives or other substances may have been added, and which is capable of functioning as a main structural component of packaging, with the exception of natural polymers that have not been chemically modified.

RETURN RATE (ZERO WASTE EUROPE)

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

REUSABLE PACKAGING (PPWR)

Packaging placed on the market shall be considered to be reusable where it fulfils all of the following requirements:

a. it has been conceived, designed and placed on the market with the objective to be re-used multiple times;

b. it has been conceived and designed to accomplish as many rotations as possible under normally predictable conditions of use;

c. it fulfils applicable requirements regarding consumer health, safety and hygiene;

d. it can be emptied or unloaded without being damaged in a way that would prevent its further function and re-use;

e. it is capable of being emptied, unloaded, refilled or reloaded while maintaining the quality and safety of the packaged product and ensuring compliance with the applicable safety and hygiene requirements, including those on food safety;

f. it is capable of being reconditioned in accordance with Part B of Annex VI, while maintaining its ability to perform its intended function;

g. it allows for affixing of labels 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;

h. it can be emptied, unloaded, refilled or reloaded without risk to the health and safety of those responsible for doing so; and

i. it fulfils the requirements specific to recyclable packaging set out in Article 6, so that it can be recycled when it becomes waste.

REUSE (PPWR)

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

REUSE SYSTEM (PPWR)

The organisational, technical or financial arrangements, together with incentives, that allow re-use either in a closed loop or open loop system, such as a deposit and return system that ensures that packaging is collected for re-use.

ROTATION (EUROPEAN UNION)

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 product. Also referred to as a "reuse cycle".

SINGLE-USE PACKAGING (PPWR)

Packaging which is not reusable packaging.

STANDARD (EUR-LEX)

A technical specification, adopted by a recognised standardisation body, for repeated or continuous application, with which compliance is not compulsory, and which is one of the following:

a. 'international standard' means a standard adopted by an international standardisation body;

b. 'European standard' means a standard adopted by a European standardisation organisation;

c. 'harmonised standard' means a European standard adopted on the basis of a request made by the Commission for the application of Union harmonisation legislation;

d. 'national standard' means a standard adopted by a national standardisation body;

PACKAGING TYPES

BEVERAGE BOTTLES (REGULATION (EU) 2025/40, ART 2)

Sales (primary) packaging intended to constitute a sales unit for the end-user, including bottles used for containing and selling beverages.

CRATES (REGULATION (EU) 2025/40, ART 2)

Packaging designed to group or transport products, such as rigid boxes or pallet-containers, classified as transport (tertiary) packaging under the PPWR.

CUPS FOR BEVERAGES (REGULATION (EU) 2025/40, RECITAL 11)

Service packaging filled at the point of sale, such as takeaway cups provided with a drink to the consumer, and therefore considered packaging under the Regulation.

E-COMMERCE PACKAGING (REGULATION (EU) 2025/40, ART 2)

Packaging used for the delivery of products sold online or through distance sales channels to the final user, generally considered as transport packaging.

FOOD CONTAINERS (REGULATION (EU) 2025/40, ART 2)

Primary packaging intended to hold and protect food products, subject to design, recyclability, and reuse requirements under the PPWR.

JARS (REGULATION (EU) 2025/40, ART 2)

Sales packaging forming a sales unit for the consumer, typically used for food or cosmetic products, falling under the general definition of primary packaging.

PALLETS (REGULATION (EU) 2025/40, RECITAL 95)

Transport (tertiary) packaging used to facilitate the handling, storage, and transport of grouped goods; explicitly mentioned in the PPWR as an example of reusable transport packaging.

SECTORS

E-COMMERCE

Includes any company that provides reusable packaging to companies selling products directly to end users through online platforms or other distance selling methods (e.g. online retailers, subscription box providers, marketplaces, and direct-to-consumer brands).

Linked definitions:

- **E-commerce packaging (PPWR):** Transport packaging used to deliver products in the context of sale online or through other means of distance sales to the end user.

HOSPITALITY

Includes any company that provides reusable packaging to companies offering food, drink, lodging, leisure, or event-related services by serving consumers directly on-site or through takeaway/delivery systems.

This survey differentiates:

- **B2B hospitality:** Providing reusable packaging to hospitality companies (e.g. glass bottles, reusable jars)
- **B2C hospitality:** Providing reusable on site dining and takeaway packaging for hospitality consumers (e.g. reusable cups, reusable containers)

Linked definitions:

- **Take-away packaging (PPWR):** Service packaging filled at attended points of sale with beverages or ready-prepared food that are packaged for transportation and immediate consumption at another location without the need for any further preparation and are typically consumed from the packaging.
- **Hospitality packaging (New ERA):** Reusable packaging used for businesses that provide services related to hotels, restaurants (including takeaway and delivery), bars, events, canteens, theme parks, and recreational facilities.
- **HORECA sector (PPWR):** Accommodation and Food Service Activities according to NACE Rev. 2 – Statistical classification of economic activities.

RETAIL

Includes any company that provides reusable packaging to companies selling packaged consumer goods directly to end users through physical points of sale (e.g. shops, supermarkets, pharmacies).

Linked definitions:

- **Retail packaging (New ERA):** 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

Includes any company that provides reusable packaging to companies active in logistics, warehousing, and distribution activities that involve the handling, protection, and delivery of goods in bulk or grouped formats throughout the supply chain. This applies to both B2B and B2C logistics, excluding large transport containers (like shipping containers).

Linked definitions:

- **Transport packaging (PPWR):** Packaging conceived so as to facilitate the handling and transport of one or more sales units or a grouping of sales units, in order to prevent damage to the product from handling and transport, but which excludes road, rail, ship and air containers.

LIST OF NATIONAL PARTNERS

CONSOMACTION, BELGIUM

ConsomAction is the Belgian federation of professionals in the bulk goods and packaging reuse sector. It represents and gathers stakeholders committed to reducing waste, from producers to consumers, around a packaging-free, local, ethical and low-impact model. From content to container!

FOSTPLUS, BELGIUM

Since 1994, Fost Plus has driven Belgium's shift to sustainable packaging by improving design, boosting sorting and recycling, and fulfilling the Extended Producer Responsibility of its 5,000 members to build cleaner, circular material chains.

MAPP CENTRE, DENMARK

MAPP is a leading interdisciplinary research centre at Aarhus University with 30+ years' experience. With 25–40 researchers, it studies food-related behaviour and perceptions and has strong EU, Nordic, and Danish collaborations with academia, industry, and NGOs.

ZERO WASTE ESTONIA FOUNDATION, ESTONIA

Zero Waste Estonia SA empowers organisations and individuals to thrive in their efforts toward sustainability. With a mission to unite communities, raise awareness, and drive meaningful change, it works toward a waste-free world.

RESILIENT PLANET, GREECE

Resilient Planet helps businesses turn sustainability into strategy. Through engaging workshops and practical tools, we empower teams to act on climate, embrace circularity, and build resilient, future-proof organizations.

RÉSEAU VRAC ET RÉEMPLOI, FRANCE

Réseau Vrac & Réemploi brings together stakeholders of bulk sales and reusable packaging in France. It fosters the development of the industry through advocacy, standardization, studies, a trade fair, and communication campaigns.

MEHRWEGVERBAND DEUTSCHLAND, GERMANY

The Reusable Packaging Association Germany (RPAG, Mehrwegverband Deutschlan e.V.) unites ~ 100 members working on reusable systems, research, logistics, material solutions, and advocacy to prevent packaging waste and to close packaging material loops. RPAG fosters collaboration across sectors and shares legal and practical expertise.

GIACIMENTI URBANI, ITALY

Giacimenti Urbani is an Italian association promoting circular economy and waste reduction by reusing materials, extending product lifecycles, and fostering community-based sustainable practices.

ZERO WASTE LATVIJA, LATVIA

Zero Waste Latvia is a NGO that brings together sustainability enthusiasts to make life without waste in Latvia a norm, promotes principles of zero waste lifestyle and circular economy, and seeks to reduce the environmental impact of pollution caused by Latvian society.

POLSKIE STOWARZYSZENIE ZERO WASTE, POLAND

The Polish Zero Waste Association works to raise public awareness about resources, prevent waste generation at the source, promote a zero-waste lifestyle, and encourage shifts in production and consumption patterns towards a circular economy.

CIRCULAR ECONOMY PORTUGAL, PORTUGAL

Circular Economy Portugal (CEP) is a non-profit that promotes the circular economy through awareness, training, and consultancy. Its mission is to empower people, organizations and public entities to adopt systemic and collaborative circular practices.

INŠTITÚT CIRKULÁRNEJ EKONOMIKY, SLOVAKIA

Institute for Circular economy (INCIEN) is a non-profit organization focused on supporting the transition to a circular economy. Cooperates with local governments, companies, and the public (both professional and lay), produces analyses and publications, and builds capacity in the field of circular economy.

EKOLOGI BREZ MEJA, SLOVENIA

Ekologi brez meja is a one of the leading Slovenian NGOs dedicated to improving the state of the environment — focusing on efficient resource use and active citizenship. Most of their activities deal with promoting waste prevention and minimization.

ES REUTILIZA, SPAIN

Es Reutiliza is the Spanish Alliance for Reuse, which aims to promote public policies, action frameworks, and awareness-raising activities aimed at promoting the development of packaging reuse systems and bulk sales in Spain."

DURABILITAS, SWITZERLAND

Durabilitas is an independent Think & Do Tank engaged for a sustainable Switzerland. Since 2022, we promote packaging reuse by fostering science-to-society knowledge transfer, coordinating industry actors, and advocating for better framework conditions.

VERPACT, THE NETHERLANDS

Non-profit created in 2023 from the merger of Afvalfonds Verpakkingen, Nedvang and KIDV. Verpact is the Dutch EPR organisation for packaging, coordinating collection, recycling and waste prevention while supporting companies in meeting their obligations.

INCIEN, CZECH REPUBLIC

INCIEN (Institute of Circular Economy) is a non-profit organization active since 2015. It promotes circular economy by helping businesses, municipalities, government, and communities cut waste, reuse resources, and innovate sustainably.

GOUNPACKAGED, UNITED KINGDOM

GoUnpackaged is the UK's leading consultancy specialising in reuse and refill, helping clients across the supply chain to reduce their single-use packaging footprint by transitioning to reuse, undertaking research & advising governments on reuse policy.

Gordon

LIST OF COMPANIES

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.

BIBAZ, FRANCE

Bibaz designs and distributes distinctive reusable containers, combining design and innovation through their unique, modular combinations.

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.

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.

BOTTLESS, FRANCE

BOTTLESS develops refillable, airless packaging solutions for cosmetics and personal care. By reducing plastic by over 90% while preserving premium performance, they empower brands and consumers to enjoy sustainability without compromise.

BOUT' À BOUT', FRANCE

Bout' à Bout' develops glass reuse in Western France with a wide collection network and France's largest ISO 22000-certified washing plant. It co-founded GO! Réemploi, a service provider for Citeo, to scale reuse nationally.

BOXO, NETHERLANDS

BOXO is a mission-driven and Steward Owned company offering a universal deposit system for reusable shipping packaging used by webshops. It connects webshops, parcel carriers, fulfilment and packaging companies through one system.

CA VAUD L'RETOUR, SWITZERLAND

ça Vaud l'retour is a Cooperative aiming at developing a reuse system in the French part of Switzerland - accompanying local producers and shops in the steps to adopt reuse

CAPSA PACKAGING, SPAIN

Capsa Packaging has pioneered the first reusable cardboard box, enhancing the performance of any conventional box. Improve logistics safety and efficiency while reducing waste and carbon footprint.

CAULI, UNITED KINGDOM

Cauli (CauliBox) is the largest reuse system provider for UK foodservice. Their award-winning software and hardware technology enables circular food & drink packaging with an industry-leading 99.6% return rate.

CIRCOLUTION, GERMANY

Circolution provides reusable packaging-as-a-service for food brands and retailers. It manages the entire circular system - from smart packaging and tracking to washing and logistics - enabling scalable, data-driven reuse solutions.

CIRQLE, DENMARK

Cirqle builds the digital infrastructure for reusable packaging. Their RFID-enabled system tracks every use, automates deposits, and delivers verified CO_2 & waste savings—making reuse as effortless and scalable as single-use.

CLUBZERØ, UNITED KINGDOM

Clubzerø's Reuse Packaging System drives regulatory compliance & cost reduction for governments & brands globally. Its patent-protected system includes reusable packaging, drop point infrastructure & tracking technology, eliminating single-use waste.

CONSIGN'UP, FRANCE

Consign'Up is a cooperative of collective interest based in Occitanie Pyrénées that operates the all reuse loop. It collects, washes and resells reusable packaging to regional stakeholders in favor of a more local and economically viable circular economy.

CU MEHRWEG, GERMANY

The company is developing standardized reusable cups with a 50 cent deposit. They can be returned through existing reverse vending machines, ensuring easy integration into retail systems.

CUP REVOLUTION LATVIA, LATVIA

Only company in Latvia with a reusable system, providing a full-service solution based on a one-stop principle.

CUPHERO, ITALY

CupHero designs and supplies high-quality reusable polypropylene cups for festivals, stadiums, bars, and events. Combining sustainability, innovation, and customization, it helps brands reduce waste while offering a practical, eco-friendly experience.

ECO PACKAGING IDEAS, SPAIN

The company promotes reusable packaging to reduce impact and build a zero-waste society. Through innovation, it extends resources, improves user experience, and proves that a better way of producing and consuming is possible.

CUPXCHANGE, NETHERLANDS

CupXchange offers a full service solution for reusable cups and packaging with the lowest environmental impact and highest social impact.

DISHCIRCLE, GERMANY

The company manufactures reusable Packaging. It provides a rental service for reusables for every B2B usecase as well. The reusables are also cleaned in its own cleaning facility.

DISTRO, FRANCE

Distro is operating a reuse system for the glass bottles. Helping producers to convert into the circular economy, operating logistic and cleaning operations for them.

CUPUP SYSTEM, CROATIA

Founded in 2015, CupUp was established with a clear mission: to reduce waste by offering eco-friendly, reusable cup solutions for businesses and events.

ECOSCIENCE PROVENCE, FRANCE

Ecoscience Provence is a non-profit scientific organisation dedicated to environmental preservation. Since 2005, it has been leading projects focused on three main themes: circular economy, sustainable consumption, and waste reduction.

EN BOÎTE LE PLAT, FRANCE

En Boîte Le Plat France is a national network that aims to challenge society's throwaway mentality by reintroducing a collective solution for reusable takeaway food packaging. It is made up of eight local associations.

ETERNITY SYSTEMS, FRANCE

Eternity Systems specializes in the industrial washing, repair, storage, and transportation of reusable packaging. It currently operates 18 washing facilities across France, Germany, Spain, Portugal, the US, and Canada.

FAIR SQUARED, GERMANY

Fair Squared GmbH is a Cologne-based German company offering certified fair-trade cosmetics and hygiene products. It is committed to natural ingredients, zero-waste packaging, social and environmental responsibility, and transparency.

FAIRCUP, GERMANY

FairCup GmbH is a German reuse system providing deposit-based cups and food containers for retail, gastronomy, and on-the-go consumption. With partners across supermarkets, bakeries, and cafés, FairCup promotes sustainable, circular packaging.

GORDON, SWEDEN

Gordon is a last-mile company specializing in coordinated flows of temperature-controlled deliveries. The company has two business areas: a comprehensive solution for refrigerated last-mile deliveries and a SaaS platform. Gordon was founded in 2015.

GOUNPACKAGED, UNITED KINGDOM

The Refill Coalition, run by GoUnpackaged, is a groundbreaking cross-sector collaboration between leading UK companies to develop scalable, standardised refill and reuse solutions for in-store and online. The solutions are proven, in-market and ready to use.

HEKET PACKAGING, ITALY

Heket Packaging Systems develops innovative solutions for reusable packaging, creating efficient circular systems that extend product life cycles and reduce environmental impact

HAUT LA CONSIGNE, FRANCE

Haut la Consigne makes the reuse of containers, especially glass bottles, possible by providing consulting and necessary operational solutions like collecting, sorting and washing (including drying and machine inspection). It also treats Beauty care flasks.

GRIN, NORWAY

GRIN makes smart collection systems for the circular economy. It helps companies get their circular products back from consumers. Enabling new circular ecosystems and business models for anything from reusable packaging to medical devices to electronics.

INCASSABLE, FRANCE

L'Incassable is developing a glass bottle reuse network in the South of France to reduce waste from single-use packaging.

KEEPIN, GERMANY

KeepIn dedicates all its passion to producing reusable packaging. It provides system providers, the HoReCa sector and event organisers with tailor-made sustainable solutions that can be fully customised to reflect corporate identity or brand.

KEGS UNITED, NETHERLANDS

Kegs United b.v. is a not for profit pool for renting refillable 20L beer kegs in The Netherlands. Over 30 beer breweries in The Netherlands use its steel kegs, and it is growing.

KIMI, SLOVENIA

Kimi is a Slovenian company established in 1990, specializing in the development and production of cleaning, washing, and hygiene products. Its activities include the manufacturing of soaps, detergents, cleaning and polishing agents, and disinfectants.

KIUD TECHNOLOGIES, ESTONIA

KIUD transforms textile waste into reusable, rigid packaging. Their patented process upcycles such abundant waste stream into strong sheet material. Enabeling cost cuts, CO_2, & to reduce single-use cardboard while helping brands meet EU PPWR 2030 reuse targets.

KOOR, FRANCE

Koor's award-winning pump-action container is designed for refillability, repairability, and accessibility—from liquids to viscous products. It offers multiple refill methods, from manual to fully automated, making reuse practical at home or in-store.

LE FOURGON, FRANCE

Le Fourgon delivers everyday products in reusable packaging among individuals and professionals. Since 2021, more than 35 M of packaging has been collected and reused thanks to their electrical vans and 97% of return rate.

LEIHBOX, SWITZERLAND

LeihBOX provides a rental solution for reusable foldable plastic boxes, plus software, logistics, container processing, B2C return network, and smart boxes with sensors for efficient standardized secondary packaging circulation.

LES EMPOTÉS, FRANCE

Les Empotés is an eco-responsible company that deliver catering services, for lunch, cocktail party or gala evening, in Paris and Ile de France. Every dishes or container is picked up after the event, washed and re-used.

LYRECO, NORWAY

The Lyreco Group is a market leader in Europe and the world's third-largest distributor of workplace products and services. The Group operates in 25 countries across Europe and Asia.

MA BOUTEILLE S'APPELLE REVIENS, FRANCE

A pioneer in reuse, Locaverre is a cooperative company created in 2017 to carry out the project Ma bouteille s'appelle Reviens. In 2024, the company washed 1.3 million bottles, thereby avoiding more than 678 tonnes of waste.

MEHRWEGKONZEPTE SERVICE, GERMANY

One of the most powerful washing systems for reusable plastic containers in Germany. Storage, nationwide logistics, and concept development. Your partner for reusable containers.

NEW LOOP, DENMARK

New Loop builds city-scale deposit-return reuse systems for takeaway packaging. It combines public return points, instant digital refunds and shared reverse logistics to make reuse as easy as single-use. Rolling out now in central Copenhagen.

OPOPOP, FRANCE

Opopop, pioneer in reusable parcel packaging in France, helps companies move from single-use to reusable parcel packaging (ready-to-use or custom), technology (deposit system, tracking tools, logistics APIS...), and full support from strategy to operations.

OENOCO, FRANCE

Oenoco's mission is to design innovative products and solutions to contribute to the revival of deposit systems, particularly in the wine sector.

OÉ, FRANCE

Oé is B Corp certified since 2017, and the first wine brand to put back in place the Deposit Return System. It also works on a zero waste logistic. Their wines are certified organic and pesticide-free.

PACTOZERO, SPAIN

PactoZero develops reusable packaging systems for foods and drinks in shops, food catering services, and events. It combines technology and experience to achieve successful and sustainable implementations.

PAKA, SPAIN

Paka is a smart reusable packaging system to free food from plastics in the fresh local markets.

PAKT, NETHERLANDS

Pakt is a circular packaging partner helping brands replace single-use with durable, reusable systems. They design, source and manage reusables, run reverse logistics and cleaning, and deliver data to cut waste, CO_2 and cost across the supply chain.

PANDOBAC, FRANCE

Pandobac offers a service of reusable crates for B2B food transportation. The service includes crates rental for food suppliers, collection, washing, and tracking. Pandobac is a sustainable and economical alternative to cardboard, wooden and polystyrene boxes.

PETAINER, UNITED KINGDOM

Petainer are experts in Reusable PET bottles. Their sites have been adapted to make high-quality bottles that can be reused. Harder to produce than a one-way bottle, their sites have dedicated equipment and quality inspection systems that ensure bottle longevity.

RECIRCLE, SWITZERLAND

reCIRCLE, based in Bern, replaces single-use packaging with reusable, durable, and eco-friendly alternatives. With local production and short transport routes, it helps save resources and reduce CO_2 emissions — together.

QAPSUL, FRANCE

Qapsul offers an innovative solution of reusable containers for meal delivery and catering. Durable, practical, and compliant with regulations, Qapsul helps professionals reduce waste and meet sustainability requirements.

RAVIOLI, GERMANY

Ravioli operates a reusable system for e-com packaging enabling brands to reduce packaging waste by up to 95% and cutting packaging related carbon emission by up to 80%. Customers receive a deposit and / or loyalty points when returning the reusable packaging.

RE-ZIP, DENMARK

RE-ZIP enables reusable packaging for both open e-commerce loops and closed internal logistics. With packaging designed for reuse, smart tracking technology and return systems, it reduces waste, cuts CO_2, and boosts loyalty.

PETREL, FRANCE

In order to reduce signe use packaging, Petrel is designing and operating packaging reusable loops between identified stakeholders. It is based in France with European ambition.

RECUP, GERMANY

ReCup is Germany's largest reusable packaging system for to-go food and drinks, offering deposit-based cups and bowls via ~20,000 partner locations. Founded in 2016, ReCup aims to build a circular ecosystem for a world without single-use packaging.

RESPRAY SOLUTIONS, HUNGARY

Respray provides in-store refill stations that are placed out into drug stores and supermarkets where customers can refill their own packaging. With innovative design, UI / UX, quality and safety features Respray leads the revolution in the refill scheme.

(ECOURAGE), NORWAY

(ecourage) offers a smart, scalable refill solution for brands. By combining closed-fill technology, digital intelligence and modular design, it enables standardized refill models that reduce waste, optimize efficiency and advances circular packaging solutions.

REFEELME, GREECE

Refeelme provides full scope reusable cup systems for festivals, sports, and hospitality venues, combining deposit-return schemes with branding and impact reporting, helping partners reduce waste, cut costs, and showcase their sustainability commitment.

REROOTED ORGANIC, UNITED KINGDOM

Organic, Fresh, Delivered dairy-free plantmilk to your doorstep. Premium high content delicious plantmilk in 8 flavours. Find them through National distributors or directly on their website.

YOYO GROCERY CO, UNITED KINGDOM

Yoyo is the world's first grocery reuse system using lightweight, low-carbon, flexible plastic packaging. With a 94% return rate and uncompromising safety standards, Yoyo is setting a new benchmark for circular grocery packaging.

REVERA, FRANCE

Revera is a local yet nationally-connected glass bottle deposit scheme system in AuRA, France. It operates a professional network by advising producers and distributors to use reusable bottles. It also collects, sorts the bottles to finally wash them before they go back to the market vendors involved in the sector.

RHINOPAQ, GERMANY

Rhinopaq reduces single-use packaging waste in B2B shipping with a smart reuse system. Their durable boxes are reused up to 20 times, RFID-tracked, and refurbished by inclusive workshops – saving up to 95% waste, 60% CO2, and 40% costs.

ROTOMPT, PORTUGAL

Rotom Portugal is part of the Rotom Group, providing sustainable pallet and packaging solutions. It focuses on reuse, repair and circular logistics to reduce waste and optimize supply chains.

SIA DEPOZITS, LATVIA

SIA Depozits specialises in reusable products and what surrounds them. It caters to customers needs and provides full service in this field. Its goal is to prove that single use is thing of the past and it is time to change. Washing is done by Hobart reusable dish washer.

SOOFÛT, FRANCE

Soofût rent, wash, and maintain stainless steel kegs for hundreds of independent breweries. Every keg it deploys replaces countless single-use alternatives, helping its clients significantly reduce their carbon footprint.

SUPER FLACON, FRANCE

Super Flacon produces and delivers home and personal care products in reusable glass bottle.

SYKELL, GERMANY

Sykell aims to accelerate the transition to the circular economy by minimising waste and preserving nature. Their goal is to make reusable packaging simple and scalable. With EINFACH MEHRWEG and CIRCULAR ERP, it builds circular systems that keep resources in use

THE KEEPERS, FRANCE

The Keepers designs and manufactures RVMs for collecting all types of reusable packaging for all high-traffic locations (supermarkets, restaurants, etc.).

THE OCEAN PACKAGE, GERMANY

Ocean Package is a reuse startup from Germany developing smart, durable packaging for e-commerce and logistics. Their reusable boxes reduce waste, money and CO_2, integrate into existing supply chains and are digitally tracked to enable scalable circular systems.

WECARRY, GERMANY

Wecarry offers reusable, RFID-enabled bags for bakeries and retailers, reducing single-use packaging. Its 100% organic cotton or recycled PET bags are durable, trackable, and designed for a circular, sustainable system.

WELL PACK, CZECH REPUBLIC

Well Pack is a world-leading company in value-added logistics services. Its strategy is grounded in a simple but powerful idea: sustainability must be practical to be transformative.

XPACK GREEN LOGISTICS, GERMANY

xpack packaging is robust, volume-optimized and reusable – the sustainable solution for shipping. It offers more than reusable packaging: a managed returnable system, including return and incentive schemes, supported by their cloud-based management platform.

LIST OF INDICATORS

Indicators monitored for this barometer:

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. INDUSTRY MATURITY AND READINESS

- Average reported return rate for reusable packaging by format/material.
- Amount of deposit or penalty applied per packaging type (for B2C applications).
- Usage of the cleaning / reconditioning centers compared to the maximum capacity (e.g. based on a full usage of the cleaning center(s) 8 hours per day, 5 days per week)
- Average number of cycle per packaging formats and materials
- 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 potential 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)

Pandobac - Léa Boeglin

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

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EUROPEAN REUSE BAROMETER

Nowa Market