

BELGIAN REUSE BAROMETER

2026 EDITION

Assessment of the current reusable and refillable packaging landscape in Belgium – structured by PPWR reuse categories

In association with:

CONSOMaction

Fostplus

A part of:

EUROPEAN REUSE BAROMETER

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Wobz

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This report would not have been possible without the reuse and refill operators active in Belgium who took time to answer the survey and share data about their formats, their return rates, their costs, their hiring plans and their stakes.

The full list of companies taking part, with what each of them does, is published on the report's website.

STRATEGIC PARTNERS

Zero Waste Europe and New ERA form the steering committee of the Reuse Barometer. They co-design the project's strategic 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.

Learn more at: zerowasteeurope.eu

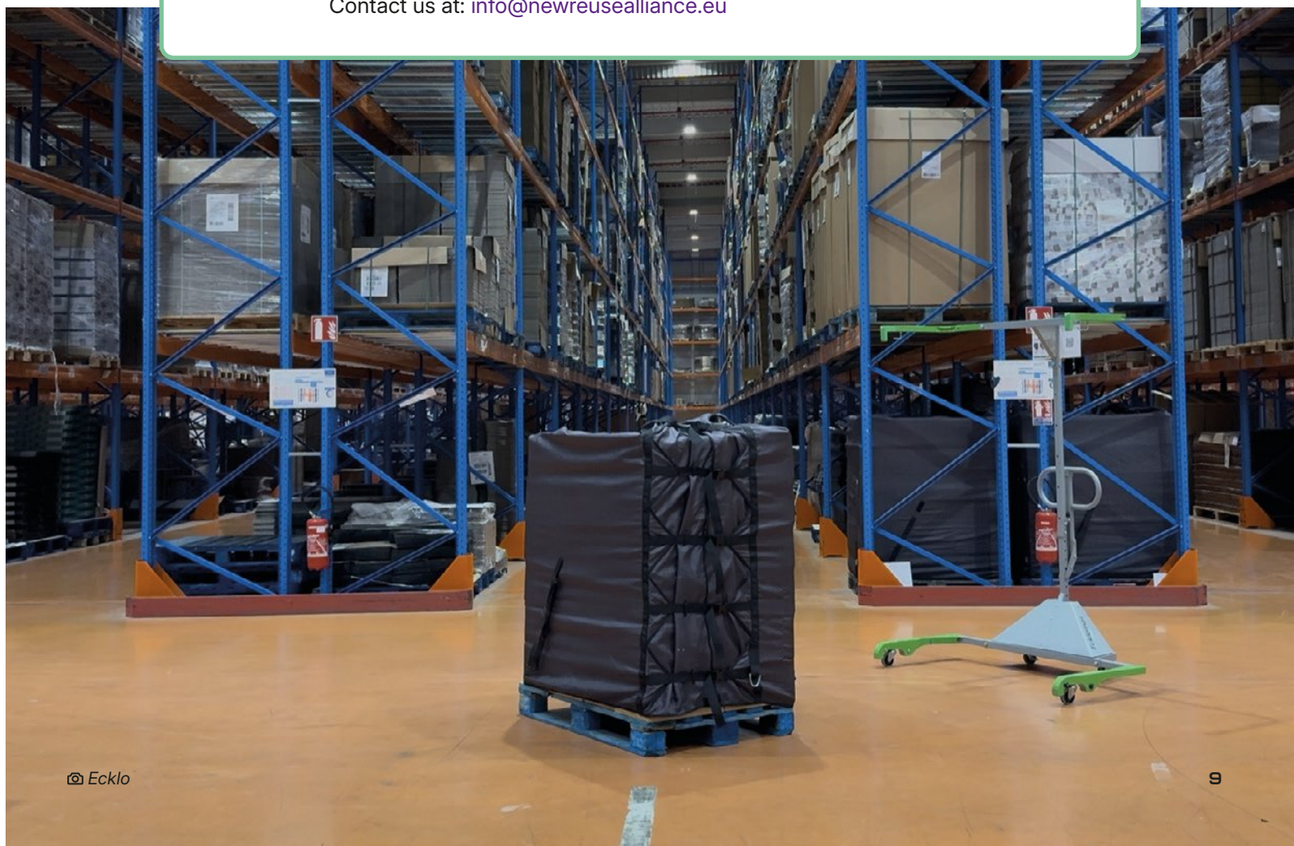
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New ERA represents organisations offering reusable and refillable solutions and support across the entire packaging supply chain – from service providers to research centres – covering various market segments such as takeaway, e-commerce, retail, and 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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Ecklo

NATIONAL PARTNERS

The Belgian edition is carried by three national partners: **Fost Plus**, **Valipac** and **ConsomAction**. They strengthen the survey's quality and relevance at country level and ensure broad participation from Belgian reuse and bulk companies by disseminating it through their networks. This Belgian edition is funded by **Fost Plus**, demonstrating its commitment to supporting innovation and accelerating the transition towards sustainable packaging systems.

Fostplus

Fost Plus bridges the gap between the insights generated by the study and their practical relevance for the Belgian market. Through its expertise and position within the packaging ecosystem, Fost Plus helps ensure the report reflects Belgian realities, provides actionable insights on market beliefs regarding reuse and refill, and supports stakeholders in navigating the implications of the PPWR targets.

Since 1994, Fost Plus has been accelerating the transition to sustainable packaging management. It works closely with citizens, businesses, public authorities and experts to collect and recycle the household packaging put on the market by its members, fulfilling their Extended Producer Responsibility. By building sustainable material chains, Fost Plus contributes to a better society and a cleaner world for all.

Learn more at: fostplus.be

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CONSOMaction

To maximise the survey's representativeness, ConsomAction encouraged its extensive network of stakeholders involved in bulk retail and reuse to contribute. It is the driving force behind the bulk retail section of this report. Finally, the association is funding the French and Dutch translation of this report, whilst committing its staff to rolling out and raising awareness of it in Belgium.

ConsomAction is a non-profit organisation committed to responsible, fair and sustainable consumption. It supports citizens, companies and public authorities in their transition towards practices that are more respectful of the environment, health and collective well-being. Through awareness-raising, training, advisory activities and the publication of practical guides, it empowers consumers to make informed choices and to actively participate in shaping a more just and well-regulated economic system.

Learn more at: consomaction.be

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valipac

Valipac plays a key role in extending the survey's reach to transport packaging: it connected the Barometer with the pooling operators read in Section 7, reviewed this edition, and its annual reporting provides the national benchmark against which the report's findings on business packaging are checked.

Valipac was created in 1997 by Belgian industry as a collective answer to extended producer responsibility for industrial packaging, and is the first European organisation dedicated specifically to that packaging. Its core mission is to achieve the recycling rates imposed on its member companies for the industrial packaging they place on the Belgian market, and beyond that to act for a circular economy: promoting circular packaging, encouraging separate collection, ensuring traceability and stimulating local recycling.

Learn more at: valipac.be

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Le Fourgon

PROJECT LEAD

InOff Plastic acts as the operational lead of the Belgian 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

Key findings from the 2026 Belgian edition of the Reuse Barometer, structured around the PPWR reuse categories, with a dedicated refill focus.

Companies surveyed
48
respondents

Reuse companies
33
in sample

Refill companies
17
in sample

This second Belgian edition of the Reuse Barometer presents and analyses the companies operating in Belgium through the lens of the EU Packaging and Packaging Waste Regulation (PPWR) reuse & refill categories, making it directly actionable for Belgian industry and policymakers alike.

The Belgian Reuse Barometer is the survey-based assessment of the reusable and refillable packaging industry operating in Belgium. This second edition is based on the Belgian respondents to the 2026 European survey: 59 of its 130 respondents operate in Belgium. Eleven of them are pan-European transport poolers. Their data is summarised in a dedicated part of Section 7 and analysed further in the European edition. Of the 48 remaining companies, 33 operate in reuse, 17 in bulk and 2 in both models. With 28 companies headquartered in the country, in this survey Belgium has the second-largest national cohort in Europe, after France. This survey of 48 companies describes the operators building these systems, not the Belgian packaging market as a whole. Fost Plus and Valipac's activity reports measure how much of the packaging placed on the market is reusable; this report describes the companies developing the reuse systems behind it. Each figure states the sample size on which it is based.

Belgium is not starting from zero. By 2025, 43% of household packaging placed on the Belgian market and 82% of commercial and industrial packaging in circulation were already reusable by weight[1] – prominent examples in Belgium are the returnable glass bottles for beer, water and soft drinks[13]. Belgium in effect runs two reuse economies: this inherited one, large and steady, and the one measured here, in which 48 companies bring the same logic – deposit, pooling, washing, standardisation – to take-away counters, e-commerce parcels and the bulk aisle. The first shows reuse solutions at scale that producers and distributors can capitalise on to work towards the 2030 PPWR targets on drink and transport packaging. The second is where innovations are still at an early stage and scale still needs to be reached.

REUSE AND REFILL: TWO COMPLEMENTARY MOVEMENTS

Belgian reuse operators are technically equipped, and they perform wherever a deposit or a contract secures the return of the packaging. Their tracking technology is already in place: three-quarters of the 16 companies answering track their packaging with QR codes, 63% with RFID and 38% with barcodes – a level equal to or above the European average for these three tracking technologies. Washing capacity is installed and waiting for volume: six companies reported how much of their maximum washing capacity they use. One reported 75%, three reported 50% and two reported 10% or less. Return rates differ with the return mechanism rather than with the sector. None of the five using an upfront deposit (a deposit is paid upfront and refunded when the packaging comes back) reports less than 50%. Both companies using a hybrid deposit (combine an upfront model with a post-paid model: consumers pay only if the packaging is not returned) report 90% or more. Of the six that reported no deposit scheme, three report less than 50%. A study for OVAM lists guide values for take-away systems, taken from a blueprint by Zero Waste Europe and Reloop: a 90% return rate after one year[4]. Of the 13 companies that reported a return rate, six reach 90% or more.

Bulk retail is an established activity for the 17 operators studied rather than a side activity. A median 70% of their assortment is sold loose, bulk generates a median of 80% of their revenue, and ten of the seventeen report that this share is still growing. Their supply chain is short: operators carry a median of 165 bulk references, half of them sourced from Belgian producers and 11 of 13 companies answering source their products within 150 km of the shop. Stock losses are 5% or less for 11 of the 12 companies answering. The main obstacle they name lies with their suppliers rather than with customers: half of the operators answering are held back by suppliers that are hard to find or not delivering in bulk, while low consumer demand is named by one in ten. These findings should be read with the sample in mind: 33 companies answered the refill questions in the 2025 Belgian edition against 17 answers in this edition.

Neither movement can reach scale alone. The 2025 Belgian edition reached the same conclusion[5]: bulk engages the consumer directly in waste prevention, reuse organises the logistics behind it, and a bulk shop is only free of single-use packaging when reusable packaging is used both to supply the shop and to take products home. In 2026, five of the 11 operators answering offer containers against a deposit. Seven reported a return rate on their containers; the median is 80%.

THE ECONOMICS OF THE TRANSITION

Operators currently carry most of the cost of the transition. Nine of the 15 companies answering pay more to acquire reusable packaging than its single-use equivalent, yet only 5 of 13 charge the end-consumer more. Whether that premium is recovered depends on the number of times the packaging

is reused: a cardboard box travelling a median 1.4 times is single-use in practice, whereas cups and food containers reused several hundred times are where reuse becomes cheaper than single-use. The operators carry this on lean teams – a median of 5.5 full-time equivalents dedicated to reuse – and they are nonetheless hiring: 16 of the 18 companies answering plan to recruit within two years, around 84 positions between them. Just under half of those answering (13 of 28) hold a Life Cycle Assessment of their packaging.

POLICY AND COLLABORATION: THE PATH TO SCALE

The support requested by respondents is consistent with last year, and differs between reuse and refill operators. Asked in this survey which policy measures would help them, 84% of companies operating in Belgium (38 out of 45) chose a tax on single-use packaging where a reusable or bulk alternative exists – the highest score of any measure in this survey, and above the 69% recorded in Europe – ahead of reuse and reduction targets (62%) and subsidies (58%). Asked what would help them most, the two groups answer differently: 88% of reuse companies rank stronger regulation and enforcement first, while refill operators rank education and awareness first (71%). Technological innovation comes last for both, which can suggest that the technology is already in place. Collaboration is already widespread – 31 of 43 report at least one active form – but standardisation, at 28%, remains the least common form. The relationship with Extended Producer Responsibility (EPR) schemes is mainly a question of visibility: 41% describe it as positive, while 27% – twice the European share – say they cannot see what EPR schemes do for reuse. For events, the regulatory framework is already advanced: Flanders requires 90% of reusable catering material to be collected[7], Wallonia makes reusable cups compulsory[8] and the City of Brussels imposes a 90% return rate on events held on its public space from September 2026: organisers must manage the complete lifecycle of reusable containers, handling everything from distribution, collection, and washing to their recirculation[9].



PRS Pooling

CALL TO ACTION

- **Policymakers:** innovators operating in Belgium highlight the importance of a supportive policy environment. Respondents point to effective enforcement of existing regulations, greater consumer awareness, and economic measures that help level the playing field between single-use and reusable systems as key enablers for growth.
- **Retailers, producers and brands:** the systems exist and are ready to be adopted. Adopt them, and develop them as shared and standardised systems rather than each building its own.
- **Investors:** support the shared loops that will be needed for the 2027 and 2030 obligations as demand for them is expected to rise.

Section 10 develops these recommendations actor by actor. The message of this second Belgian edition is that the foundations exist and the mechanisms have been proven. Belgium's strong reuse heritage and drinks expertise provide a solid foundation for a growing reuse and refill economy. With the PPWR providing clear direction towards reuse, regulation, retail and consumers can help turn this momentum into new business models and value chains.

INTRODUCTION

The PPWR reuse targets, the Belgian context, and what this national edition adds

CONTEXT AND PURPOSE OF THE BAROMETER

The Belgian Reuse Barometer is the national benchmark dedicated to reusable and refillable packaging systems in Belgium. Launched in 2025 as the country's first[5-6], and part of the European Reuse Barometer family that has tracked the industry in three annual editions[10], it documents, quantifies and supports the transition towards reuse and refill across the sectors that carry it – food and beverages, retail, hospitality, e-commerce and B2B transport. This second edition is based on the Belgian respondents to the 2026 European survey: 59 companies operating in Belgium, of which 48 form the study base; the eleven others, the pan-European transport poolers, are read on their Belgian-relevant indicators in Section 7. It examines the national market in more detail than the European report can: the cost of reuse measured from both the operator's and the consumer's side, return rates by the mechanism securing them, tracking technology, washing utilisation, and a refill section on bulk as an operating supply chain. Throughout, self-reported figures are cross-checked against published benchmarks under the verification framework described in Section 4.

THE PACKAGING TRANSITION ENTERS ITS BINDING PHASE

The regulatory framework the industry has called for is now in place. The EU's Packaging and Packaging Waste Regulation (PPWR), formally adopted in late 2024, became applicable on 12 August 2026[11] – it sets legally binding reuse and refill targets, directly applicable in every Member State. It requires each Member State to reduce packaging waste per capita by 5% by 2030, 10% by 2035 and 15% by 2040 against 2018 levels, and beneath those headline figures it sets category-specific reuse quotas rising from 2030 onwards – for transport packaging, for beverages, for grouped packaging – alongside refill and reuse obligations at the take-away counter and refill provision for large retail stores. The fieldwork for this report closed in the weeks before the regulation became applicable, and the report is published with it in force. It therefore provides a reference picture of the Belgian market at the moment the binding obligations began.

Why the targets exist is visible in Fost Plus's own numbers. In the Fost Plus Environmental Barometer, 80% of the Belgians surveyed say there



Vytal

is too much packaging[64] (Ipsos surveyed 1,000 Belgians for this study between June and September 2024). In its 2024 Activity Report, Fost Plus adds that "there is a clear need for innovative and sustainable packaging systems, with an increasing focus on prevention and reuse"[2]. The organisation summarises what the PPWR asks: "The amount of packaging waste per capita must be significantly reduced, and to achieve this, the main focus is on the development of reusable packaging systems". Even though Belgium remains the European recycling champion (79.3% recycling rate of packaging versus 67.4% as EU average[22]), the prevention curve is dropping: Between 2024 and 2025, barely 2 kg less packaging waste per resident was collected over the two-year period.

A NATIONAL MOMENTUM

Belgium enters that era with a solid base. By 2025, 82% of the commercial and industrial packaging in circulation on the Belgian market was reusable by weight[14], and 43% of household packaging[2]. That 43% share – 99.3% by weight in 2025 – is mostly beverage glass: the beer, water and soft-drink bottles on which Belgians have used a deposit for decades[12]. Valipac's breakdown by material provides some details on reusable commercial and industrial packaging. In 2025, the reusable share of commercial and industrial packaging was 96% for metal, 91% for plastic, 90% for wood against 2% for paper and cardboard[14] which

Valipac describes as not really suitable for reuse. Valipac records reusable packaging at each rotation. At the European level, Reusable Packaging Europe highlights that 1.2 billion reusable transport assets circulate, completing on average 56 rotations over an eight-year life[15]. Regarding reusable cups, eight social-economy companies coordinated through the Wash-IT platform wash more than 60 million reusable cups a year.

Rules and projects are developing but so far cover a narrow field. Since June 2023, Flanders has banned serving drinks in single-use containers at events and organisers who use reusable containers must guarantee that at least 90% are collected for reuse[7]. PET bottles and cans were given a temporary exception that was due to end on 1 January 2025. On 20 December 2024, the Flemish Government postponed that date to 2030, judging the deadline unworkable for the sector[16]. Wallonia has made reusable cups obligatory at events since September 2023[8]; the City of Brussels imposes a minimum 90% cup-return rate, with a reporting duty, from September 2026[9]. A study carried out for OVAM by the University of Antwerp lists values for a well-performing collection system[4], taken from a Zero Waste Europe and Reloop blueprint for take-away packaging: a return rate of 90% after one year and 95% after two, and at least 10 rotations within one year. Retail is preparing for the restriction on single-use plastic packaging for fresh fruit and vegetables, which applies from 1 January 2030 (PPWR Art. 25 and Annex V, see Section 5.5)[11]. Between April and October 2026, a collaborative model has been tested at scale: Belgium's six major supermarket chains have been selling mushrooms in a single standardised returnable tray, carrying a 0.30€ deposit and a QR code from GS1, across seven Mechelen stores[17]. It was a trial that ran for six months in one Belgian city. The pilot monitored return rates and the efficiency of the chain but no results were available for this report. Flanders' Green Deal Anders Verpakt published its final report in June 2025: 31 of the 59 participating parties said their project would not be stopped immediately[19]. However, the scopes concerned by these rules or projects are still very narrow: usually restricted to just a few types of product or packaging. A lot remains to be done to address the single-use consumer packaging used every day, while ensuring the most sustainable packaging solution is chosen in each context. Belgium's emerging refill and reuse economy offers scope for further innovation and scaling to help meet the PPWR targets.

OBJECTIVES OF THE BAROMETER

The 2026 Belgian Reuse Barometer pursues three objectives:

1. **Assess the maturity** of reuse and refill across the PPWR's packaging categories – readiness levels, formats, materials and system types – so that each chapter can be read against the target its companies will have to meet;
2. **Measure performance** where it decides viability: return rates by the mechanism that secures them, acquisition and shelf costs, tracking, washing utilisation, employment, and the refill supply chain from sourcing to container returns;
3. **Support coordination** between companies, retailers, EPR schemes, reuse national associations and the three Regions, with indicators kept comparable with the European edition so that Belgian progress can be read at European scale.

WHAT THIS SECOND EDITION CHANGES

From market sectors to the regulation's own categories. The 2025 edition mapped the Belgian ecosystem for the first time, in the sector categories the market itself uses; this edition replaces that taxonomy with the regulation's. **Transport, Beverage and Take-away (HORECA)** directly mirror the packaging categories addressed by the PPWR's reuse targets, and a dedicated **Refill** segment tracks the bulk (packaging-free) models its refill provisions promote. A fourth category, '**Other: Food & Personal care**', carries no binding PPWR targets to date but is tracked with the same indicators because several respondents work in it. It merges two categories that the European edition reports separately – food packaging outside HORECA, and personal & home care. The category-by-category targets are set out in Section 5, "PPWR Obligations on Reuse & Refill".



Foodprint

Scope characteristics that should be noted. Eleven companies operating in Belgium are left out of this report's figures. They are pan-European poolers of transport packaging, such as pallets and crates moved between businesses. Their staff, revenue and hiring figures describe European groups, not Belgian activity, so these are analysed in the European report. However, their packaging, how they are standardised, how they come back and what they cost are as valid in Belgium as anywhere, so those indicators are read on their own in a one-page panel at the end of Section 7. However, transport companies that provide reusable packaging used for e-commerce are still analysed in this report because their parcels reach a final consumer. In the same way, a company active in transport and in another category, such as an industrial washer for consumer packaging, will also be analysed in this report. The refill focus is deepened: building on the dedicated Belgian refill edition driven by Sylvie Droulans of ConsomAction in 2025[5], the refill indicators are published here as eleven full charts plus a food-versus-non-food read in prose, on a cohort of 17 Belgian bulk operators.

This second edition moves from mapping the Belgian ecosystem to measuring its performance. Its ambition is unchanged: to give companies, policymakers, investors and end consumers a shared evidence base, and to show that reuse and refill are not only a regulatory requirement but an industrial opportunity in Belgium. The chapters that follow examine the market category by category, against the targets its companies will have to meet.



Dutch Cups

METHODOLOGY

How the 2026 survey was designed, collected, and structured around PPWR categories

METHODOLOGICAL APPROACH

1. ONLINE SURVEY

Between April and July 2026, the European Reuse Barometer survey was distributed to companies offering services for reusable or refillable packaging systems headquartered and operating in Europe. The questionnaire collected self-reported data on company profiles, packaging formats used, operational performance, logistics models, financial indicators, and perceived regulatory and financial barriers. This Belgian edition is built on the respondents operating in Belgium, whether headquartered there or naming Belgium as one of their markets.

Of the 130 European respondents, **59 operate in Belgium and 28 are headquartered there** – the second-largest national cohort after France (35). Eleven pan-European operators of transport packaging pools are then set aside from the figures and read separately in Section 7; the 48 that remain form the study base (see the scope rule in 4.2): **33 in reuse and 17 in bulk** (two operate both models).

When this report compares Belgium with Europe, it applies the same rule to Europe: companies working only in B2B transport are left out. The European figures shown here (111 companies) can therefore differ slightly from those in the European report (130 companies).

2. DATA VALIDATION AND CONSOLIDATION

Responses were cross-checked for internal consistency. Every figure in this report is drawn directly from the survey data with no imputation: where a company did not answer a question, it is excluded from that figure's sample rather than assigned a default. This is why sample sizes vary from figure to figure, and why each figure states its own.



Loopipack

The figures are self-reported. This remains the only practical way to collect data at this level of detail and around 30 indicators, but self-reported data tends to run optimistic, and errors, rounding or honest overstatement may go undetected if a figure is never compared with an external source. Three checks are therefore applied before publication:

- **Automated consistency checks**. Each submission is compared against the company's own past figures and against peers in the same country, sector and size bracket; outliers are flagged and resolved directly with the company – corrected, excluded, or explained as a case study.
- **External benchmarks**. The weightiest indicators are checked against independently published data: national EPR and PRO reporting (Fost Plus, Valipac)[1-13-14], the 2025 Belgian edition of this barometer[5-6], the Deloitte bulk-and-reuse barometer for the neighbouring French market[21] – see the Bibliography.
- **Published with a confidence note**. Readers who identify an inconsistency may report it directly to the editorial team, and confirmed corrections are reflected in the next update.

The analysis focuses on identifying patterns and trends rather than statistical representativeness, consistent with the exploratory nature of the Reuse Barometer.

3. INDICATOR DEVELOPMENT

The questionnaire ran in seven thematic blocks over five pages, with most questions conditional on earlier answers – a pooler and a zero-waste grocer each saw only the questions that applied to their model. The single most important branch point is the industry question (reuse, bulk, or both), which separates reuse from refill companies throughout this report. The full indicator list is given in the Appendix.

4. COVERAGE AND FOCUS COUNTRIES

Dissemination ran through the barometer's national partners – in Belgium, Fost Plus, ConsomAction and Valipac – by direct outreach and newsletters. Belgium is one of the three countries with the highest number of respondents, alongside France and Germany, which is what makes this dedicated national analysis possible.

5. DATA REPRESENTATION AND LIMITATIONS

While not statistically exhaustive, the dataset provides a snapshot of the Belgian market, on samples that are necessarily smaller than European level ones: groups per category range from 5 to 17 companies. The transport panel of Section 7 rests on eleven operators answering between three and nine questions each; it is reported as counts and is never combined with the base. Year-on-year comparisons in this report should be read with the sample in mind: the 2025 Belgian edition drew on 34 companies answering the reuse questions and 33 answering the bulk questions, where this edition counts 33 reuse companies and 17 bulk operators. The number of reuse companies is stable, while the number of bulk operators is roughly half the size it was. Every figure displays its sample sizes (n = ...) so that the reader can assess how much weight to give it.

ANALYTICAL FRAMEWORK - PPWR PACKAGING CATEGORIES

The 2026 edition introduces a structural shift relative to previous editions. Rather than organising data by sector of activity (retail, hospitality, e-commerce, transport), findings are now organised by PPWR reuse category. This change makes the report directly actionable: readers can identify, for each regulatory target, which companies are already operating relevant systems and what performance they achieve.

Four reuse categories are used throughout: **Transport**, **Beverage**, **Take-away** and **Other**: **Food & Personal care**. The last of these merges the European edition's two separate "Other" categories – food packaging outside HORECA, and personal & home care packaging – because on the Belgian base each holds only a handful of respondents; a company tagged with both is counted once. **Refill** is treated as a distinct segment rather than a fifth reuse category, because a refill model – where the end user supplies the container – is structurally different from a reuse system where the operator owns and circulates the packaging. **One Belgian scope rule applies**: companies whose only category is Transport and whose sectors include no e-commerce are excluded, as explained in 4.1. Transport therefore appears in every category figure only as its **E-commerce** sub-group; a multi-category company (such as an industrial washer serving several markets) keeps its place in all its other categories.

Categories are assigned by what a company actually does with the packaging, not by the packaging format it reports. The test is who physically interacts with the container and for what purpose. A company is assigned every category its activity genuinely covers, so a company may carry one, several, or none: the assignment is not a single "primary" category, and the per-category counts in this report therefore sum to more than the number of companies. Companies whose activity sits outside the categories – consultants, networks and NGOs, and some manufacturers – carry none, and are excluded from the by-category figures. That reflects the assignment method rather than incomplete data.

Two rules govern the assignment:

- **Transport – E-commerce is pooler-only**. It is assigned only to a company that itself manages the e-commerce packaging – collecting, cleaning and redistributing it. Merely using reusable e-commerce packaging that someone else manages does not qualify.
- **Software and cleaning companies are classified according to the packaging their clients use**. Every assignment was made company by company from the survey response and public evidence, and reviewed case by case.


ReCircle

PPWR OBLIGATIONS ON REUSE & REFILL



Euro Pool System

This section presents the reuse and refill targets and obligations set by the Packaging and Packaging Waste Regulation across five areas of the packaging value chain. Each packaging category is illustrated with companies operating in each space. Fost Plus and Valipac' Matchmaker and the Reuse Barometer website can be used to search for Belgian Reuse & Refill solution providers, searchable by category.

TRANSPORT PACKAGING

Transport packaging is packaging conceived to facilitate the handling and transport of one or more sales units or a grouping of sales units, preventing damage from handling and transport – excluding road, rail, ship and air containers[11]. **Grouped packaging** – packaging constituting a grouping of sales units at the point of sale – travels through the same business-to-business handling and transport loops. For simplicity, Grouped packaging is inserted into this Transport category. At European level this category regroups crates / boxes and pallets used in B2B exchanges within the retail, hospitality, pharmaceuticals, chemicals and horticulture & agriculture sectors, **and it also covers e-commerce packaging**: under the PPWR, packaging used to deliver goods bought online is treated as transport packaging, because e-commerce is a sales channel rather than a packaging category of its own, and it falls under the same Article 29 transport targets. **In this Belgian report, however, the category contains only the e-commerce side**: the pan-European poolers of pallets, crates and roll containers operating in Belgium are kept out of the figures, because their company-level data describes European groups, and are analysed in the European report. This packaging, however, is Belgian transport packaging, and a dedicated section reads the eleven of them on formats, standardisation, returns, cost and tracking. The figures of this report therefore cover the reusable e-commerce packaging that Belgian consumers return themselves: shipping envelopes, pouches and returnable parcel boxes.

PPWR TARGETS - ARTICLE 29

FROM 2030:

- From 1 January 2030, economic operators that use transport packaging, or sales packaging used for transporting products, including for products distributed via e-commerce, within the territory of the Union, in the form of pallets, foldable-plastic boxes, boxes, trays, plastic crates, intermediate bulk containers, pails, drums and canisters of any size or material, including flexible formats or pallet wrappings or straps for stabilisation and protection of products put on pallets during transport, shall ensure that at least 40 % of such packaging in total is reusable packaging within a re-use system.

Since 25 February 2026, a delegated act exempts pallet wrapping and straps from the two 100% requirements. They remain covered by the 40% target[59].

- From 1 January 2030, by way of derogation from paragraph 1 of this Article, economic operators that use transport packaging or sales packaging used for transporting products, in the forms as listed in paragraph 1 of this Article, within the territory of the Union, between different sites on which the operator performs its activity, or between any of the sites on which the operator performs its activity and the sites of any other linked enterprise or partner enterprise, as defined in Article 3 of the Annex to Recommendation 2003/361/EC as applicable on 11 February 2025, shall ensure that such packaging is reusable within a re-use system.
- From 1 January 2030, by way of derogation from paragraph 1, economic operators that use transport packaging or sales packaging used for transporting products, including for products distributed via e-commerce, in the forms as listed in paragraph 1, to deliver products to another economic operator within the same Member State shall ensure that such packaging is reusable within a re-use system.
- From 1 January 2030, economic operators that use grouped packaging in the form of boxes, excluding cardboard, outside of sales packaging to group a certain number of products to create a stock-keeping or distribution unit shall ensure that at least 10 % of such packaging is reusable packaging within a re-use system.



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FROM 2040:

- From 1 January 2040, those economic operators shall endeavour to use at least 70 % of the packaging referred to in the first subparagraph in a reusable format within a re-use system.
- From 1 January 2040, economic operators shall endeavour to use at least 25 % of the packaging referred to in the first subparagraph in a reusable format within a re-use system.

These targets do not apply to packaging used for dangerous goods, large-scale machinery or custom-designed equipment, flexible formats in direct contact with food/feed/food ingredients, or cardboard boxes (fully exempted).



PRS Pooling

CASE STUDY
PRS POOLING
NETHERLANDS (OPERATING IN BELGIUM)

An industry that built its own pool. PRS – Pallet Return System – is the closed pallet pool of the European plastics industry. It started in the mid-1990s, when the German chemical industry council (VCI) and then Plastics Europe "came up with an industry-wide concept based on standard, reusable pallets". Faber Group won the bid to run it and set up a European network of depots, carriers and collection centres. PRS calls it a system "created by the industry, for the industry". By serving some 70% of the polyolefins business, PRS has, in its own words, created an industry standard and says "the original participants remain customers of PRS to this day"[23].

How it works. The distribution model is divergent: pallets go from a few plastic producers to many clients. About 100 producer sites – Exxon Mobil, Borouge, LyondellBasell among them – deliver to more than 15,000 clients – converter sites – across Europe and Turkey. A producer orders pallets, ships its polymers on them, and tells PRS where they went. The receiving converter has one task: they store the pallets separately for collection and PRS then picks them up. Collection is free, damaged pallets included. At the depot the pallets are inspected and repaired against strict quality criteria and re-supplied to the nearest customer.

Who owns the pallets. PRS's user guide states that "PRS pallets are rented and remain the property of PRS. You are not permitted to destroy, re-use or sell the pallets." This matches the PPWR's definition of a closed loop system, in which packaging circulates "without the change of the ownership of packaging" and PRS describes itself as "the system operator"[23].

What secures the return. Producers exchange shipment data with PRS that enables PRS to set up return management reporting and analysis. On top of this, the collection is free for the converters and a recognition scheme recognises partners who achieve a return rate of at least 65%. The pallets are recognisable by their "characteristic green edges" and PRS markings. PRS handles losses: it is "constantly investing in and renewing the pallet pool to replace any lost pallets"[23].

BEVERAGE PACKAGING

This category covers alcoholic and non-alcoholic beverages made available to consumers in sales packaging. These bottles are mostly used in the retail and hospitality sectors.

PPWR TARGETS - ARTICLE 29

FROM 2030:

- From 1 January 2030, final distributors that make alcoholic and non-alcoholic beverages in sales packaging available on the territory of a Member State to consumers shall ensure that at least 10 % of those products are made available in reusable packaging within a re-use system.

FROM 2040:

- From 1 January 2040, economic operators shall endeavour to make at least 40 % of the products referred to in the first subparagraph available in reusable packaging within a re-use system.

OWN-BRAND RULE:

- Final distributors shall ensure that packaged products manufactured under their own brand contribute on a fair and proportionate basis towards to the achievement of the targets set out in this paragraph.



EXEMPTED : highly perishable beverages, and milk, milk products and their dairy analogues; wine, liqueur wine, sparkling and semi-sparkling wines, wine from raisined or overripe grapes, partially fermented grape must and wine vinegar; aromatised wine products; products similar to wine obtained from fruit other than grapes or from vegetables, and other fermented beverages; and alcohol-based spirits. Among grapevine products, four categories are not exempted: new wine still in fermentation, grape must, concentrated grape must and rectified concentrated grape must[11].

CASE STUDY - COCA-COLA - BELGIUM

In June 2026, Coca-Cola published a survey carried out with iVOX among 1,000 Belgians. Just over half (53%) buy water or soft drinks in glass at least occasionally, and 61% of those aged 16 to 34. For 82%, glass is the norm in a café. The weight of glass (43%) and the storing of empty bottles (29%) are named as barriers.

Coca-Cola's research and development centre in Anderlecht designed a one-litre glass bottle that is 140 grams lighter[72]. A crate of six bottles weighs 840 grams less. The bottle is being introduced gradually in all retail channels and drinks wholesalers in Belgium.

The survey also shows gaps in knowledge. Of the respondents, 48% think that all glass bottles of soft drinks and water belong in the glass recycling container. Only six in ten know that many glass bottles, including those of all Coca-Cola brands produced in Belgium, are cleaned and refilled.

Coca-Cola's glass bottles for soft drinks and water are designed to be cleaned and refilled at least 25 times, on condition that consumers bring them back to the shop. The Coca-Cola Company states that it therefore launched an awareness campaign in Belgium under the slogan Samen gaan we voor hervulbaar (together we go for refillable)[72]. Earlier in 2026, Coca-Cola and Carrefour signed a Sustainable Linked Business Plan in which Coca-Cola commits, among other things, to the lighter one-litre bottle and to stimulating reuse.

The production, collection, cleaning and refilling of the Coca-Cola bottles sold in Belgium take place in Belgium. They are refilled in Ghent, Antwerp and Chaudfontaine[72]. Returned bottles are sorted automatically. Damaged ones are recycled into new glass packaging. Intact bottles are washed inside and outside and the old labels are removed. Cameras and sensors then check each bottle before it is refilled with a new crown cap and a fresh label[72]. That way the same glass bottle can be reused at least 25 times.

TAKE-AWAY PACKAGING (HORECA)

Take-away packaging is service packaging filled at attended points of sale with beverages or ready-prepared food, packaged for transportation and immediate consumption at another location without further preparation, and typically consumed directly from the packaging. This packaging – mostly cups / tumblers and food containers / trays – is used in the hospitality, events and retail sectors.

PPWR TARGET - ARTICLE 32

BY 12 FEBRUARY 2027:

1.a. final distributors that conduct their business activity in the HORECA sector and that make available on the territory of a Member State hot or cold beverages in take-away packaging shall provide a system for consumers to bring their own container to be filled;

1.b. final distributors that conduct their business activity in the HORECA sector and that make available on the territory of a Member State ready-prepared food in take-away packaging shall provide a system for consumers to bring their own container to be filled.

2. Where consumers bring their own container to be filled, final distributors as referred to in paragraph 1 shall offer them the products at no higher cost and under no less favourable conditions than when selling the sales unit consisting of the same product and single-use packaging.

PPWR TARGET - ARTICLE 33

BY 12 FEBRUARY 2028:

- Final distributors that conduct their business activity in the HORECA sector and that make available on the territory of a Member State hot or cold beverages or ready-prepared food in take-away packaging shall give consumers the option of obtaining the products in reusable packaging within a system for re-use.
- Final distributors shall inform consumers at the point of sale, through clearly visible and legible information boards or signs, about the possibility of obtaining the products in reusable packaging.
- Final distributors shall offer the products filled in reusable packaging at no higher cost and under no less favourable conditions than a sales unit consisting of the same product and single-use packaging.

FROM 2030:

- Final distributors shall endeavour to offer 10 % of products for sale in a reusable packaging format.

CASE STUDY - BILLIE CUP BY RE-UZ - BELGIUM

Billie Cup is a reusable take-away coffee cup with a 1€ deposit, which the customer gets back by returning the cup to any café in the network. It started in 2019 and is now used in more than 400 cafés, canteens and shops in Belgium, the Netherlands and France[27]. Two Ghent environmental activists launched it under the non-profit Mei Plasticvrij, with 37 partner locations – 20 cafés in Ghent, 10 in Antwerp and the outlets of Foodmaker, a Belgian chain of healthy fast-food restaurants. At that time, its founders said that "barely one percent" of Belgian coffee-to-go customers used a reusable cup[28]. The mechanism is simple: the customer pays 1€ extra for the cup, drinks, and either hands the cup back to any café in the network for the euro or keeps it. The café washes the returned cups and serves them again. The cup is polypropylene, built for at least 500 washes and recycled into new cups at the end of its life. Cafés pay a flat yearly fee. When a customer keeps a cup, the café keeps the euro, which pays for its replacement[27].

Billie Cup has since joined Re-uz, the European company behind the reusable Ecocup festival cups and one of this edition's Belgian respondents. The network now counts more than 400 partners: over 130 in Belgium – half of them coffee bars, alongside twelve colleges and universities, the UZ Gent cafeterias and several hospitals and office buildings – over 280 in the Netherlands and 25 in France[27]. The Vrije Universiteit Brussel serves all hot drinks in Billie Cups in its restaurants on the Etterbeek and Jette campuses. The university states that this avoids 40,000 single-use cups a year on the Etterbeek campus alone[65].

During its first year of implementation, around seven customers in ten kept the cup rather than returning it, according to a Dutch review written with Billie Cup's co-founder[29]. The same review credits the system's simplicity: participating outlets have little to do beyond washing the cups and refunding the deposit.



REFILL

The PPWR defines refill as an operation by which a container fulfilling the packaging function – either owned by the end user or purchased at the point of sale – is filled by the end user or the final distributor with products purchased from that distributor. A refill station is a place where a final distributor offers products that can be purchased through refill[11].

N.B. "Refill" in common usage may be confused with recharge formats – intermediate packaging designed to refill a primary container (e.g. cosmetics recharge packs) – which the PPWR definition of "refill" does not cover, as it refers specifically to the direct filling of a container fulfilling the packaging function and owned or purchased by the end user. To avoid ambiguity between regulatory terminology and market practice, this study will use the term "Refill / Bulk", referring to the sale of products without pre-packaged packaging. The term "bulk sales" does not yet have a harmonised legal definition at European level (see Appendix A.6).

PPWR TARGET - ARTICLE 28

FROM 2030:

- From 1 January 2030, final distributors with a sales area of more than 400 m2 shall endeavour to dedicate 10 % of that sales area to refill stations for both food and non-food products.

CASE STUDY - ECOURAGE - NORWAY

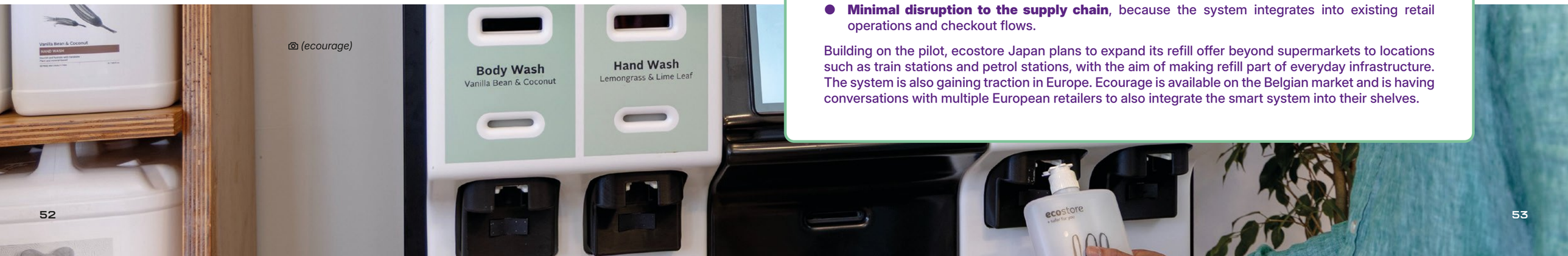
In October 2025, New Zealand household and personal care brand ecostore partnered with Ecourage, a developer of smart refill systems for liquids, to roll out automated refill machines in AEON retail stores in the Tokyo area. The pilot started in four stores and was one of the largest retail deployments of refill technology in Japan. The goal was to show that refill can fit into an everyday supermarket visit and does not have to stay a niche activity in specialised zero-waste shops[70].

Instead of gravity-fed taps or bulk drums, the Ecourage system uses precision dispensers combined with a reusable 1-litre pouch fitted with an NFC-enabled OmniCap™. Shoppers pick up a pouch, choose a product (laundry liquid, fabric softener, wool & delicates or dish liquid), slide it into the machine and press a button. About 30 seconds later the pouch is filled without mess or spills. A printed ticket is attached, and payment happens at the regular till. Customers who register their cap's unique ID can earn discounts and rewards. Because the pouch stays with the consumer, there is no need to bring empty bottles from home.

Key results:

- **An average of 58 grams of plastic saved per refill**, with each refill replacing a new bottle.
- **Fast, clean dispensing** (about 30 seconds per litre) removes the main frictions associated with traditional refill.
- **Every refill is traceable**, giving brands and retailers verified data on customer behaviour and environmental impact.
- **Built-in loyalty mechanics** through NFC caps reward repeat use and build long-term refill habits.
- **Minimal disruption to the supply chain**, because the system integrates into existing retail operations and checkout flows.

Building on the pilot, ecostore Japan plans to expand its refill offer beyond supermarkets to locations such as train stations and petrol stations, with the aim of making refill part of everyday infrastructure. The system is also gaining traction in Europe. Ecourage is available on the Belgian market and is having conversations with multiple European retailers to also integrate the smart system into their shelves.



(ecourage)

OTHER: FOOD & PERSONAL CARE PACKAGING

This category covers **food packaging outside HORECA** – primary packaging for food products sold through retail channels (shops, supermarkets, online), including jars, food containers and flexible pouches not used in a take-away context – together with **personal and home care packaging**: primary packaging for cosmetics, hygiene and household care products (bottles, jars, sprays, refill cartridges, containers) used to sell products in the retail sector. The two are reported as one category throughout this Belgian edition. Each holds only a handful of Belgian respondents on its own, and both describe the same thing: reusable primary packaging sold on a retail shelf, outside the beverage and take-away channels.

REGULATORY STATUS

- This category is **not covered by binding PPWR reuse targets**. However, reuse solutions in this space are already active in Belgium, which is why it is tracked in this Barometer. They can be an alternative to Annex V's restrictions on the use of single-use plastic packaging for unprocessed fresh fruit and vegetables. The restriction is detailed below.
- While refill targets are not written specifically for the Food & Personal Care category, its high suitability for refill models makes it a strong contributor toward the PPWR overall refill obligations.

PPWR RESTRICTIONS - ANNEX V

- Article 25: From 1 January 2030, economic operators shall not place on the market packaging in the formats and for the uses listed in Annex V.
- Single-use plastic packaging for less than 1,5 kg pre-packed fresh fruit and vegetables. Member States may set up exemptions in respect of this restriction if there is a demonstrated need to avoid water loss, or turgidity loss, microbiological hazards or physical shocks, oxidation, or if there is no other possibility to avoid commingling of organic fruits and vegetables with non-organic fruits and vegetables in compliance with requirements in Regulation (EU) 2018/848 of the European Parliament and of the Council on certification or labelling, without entailing disproportionate economic and administrative costs.



CASE STUDY - NOWA MARKET - BELGIUM

Nowa Market (short for "No Waste") is a Brussels-based online grocery store founded by Ophélie Defourt in September 2022. It sells food, cosmetics, household products and even pet food, all certified organic and all packaged in returnable jars. Nowa Market delivers across the 19 Brussels municipalities and eight neighbouring ones, including Waterloo and Tervuren. Orders placed before 10 pm arrive the next day, at the customer's home, workplace or one of more than 35 pick-up points. The company absorbs part of the cost of home delivery, a choice it considers essential to keep the service accessible.

The deposit is linked to each jar. Each jar carries a deposit of €0.10 to €5, which the company describes as a way of renting packaging rather than buying it. Every jar has a QR code: when an empty jar is returned and scanned, the deposit is credited to the customer's account and deducted from their next order. All pick-up points double as drop-off points for empty jars, which are then washed and refilled. Only Nowa Market jars and already deposited containers like beer bottles are accepted, as they are designed specifically for its reuse system. Customers can see in their account how many jars they have returned and how many are still at home.

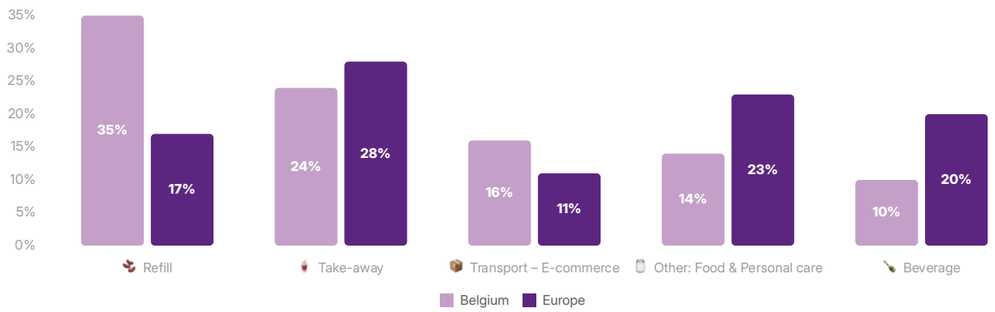
Behind this system is Nowa Market's proprietary ERP platform for reusable packaging, which tracks each container "from filling and sale to return, washing, and redistribution". The platform is now being rolled out beyond Nowa Market, helping retailers, producers and other organisations set up reusable packaging systems without building their own technology. Its aim is to remove the operational complexity that Nowa Market sees as one of the biggest barriers to reuse.

Nowa Market

OVERVIEW OF COMPANIES SURVEYED

Geographic origin, year of creation, and Social Readiness Level of the companies operating in Belgium

FIGURE 1 – PPWR CATEGORIES



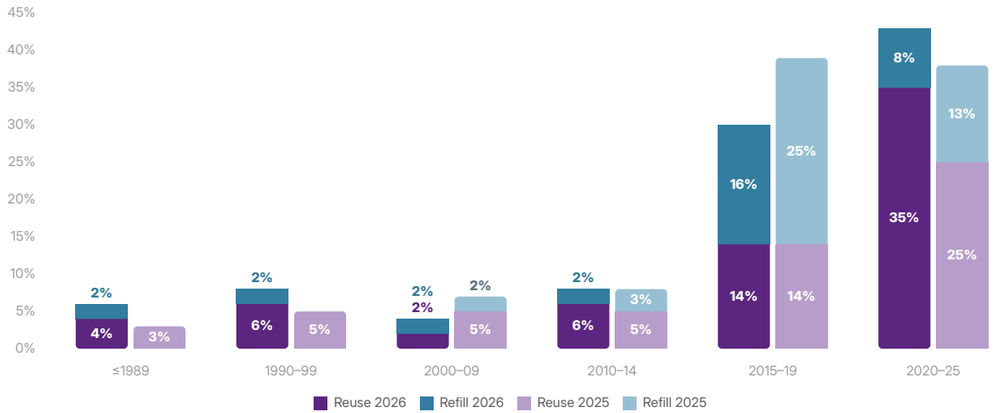
Each PPWR category as a share of all category tags; a company can carry several.
Sample: 41 companies surveyed in 2026



Aucxis

Refill is the largest segment of the Belgian study – **17 companies, 35% of all PPWR category assignments** – against only 17% at European level. Take-away follows at 24% (Europe 28%) and Transport – E-commerce at 16% (Europe 11%). The reverse applies to Beverage, at 10% in Belgium against 20% in Europe, and to Other: Food & Personal care, at 14% against 23%. This is a property of the sample and not a measurement of the Belgian market. This edition set out to cover refill alongside reuse, so Belgian bulk operators were actively sought for it – which is also why most of the refill companies in the European report are Belgian. The distribution above therefore describes who answered the questionnaire; it should not be read as the shape of packaging reuse in Belgium. It is shown so that the composition of the sample is visible to the reader before the chapters that follow.

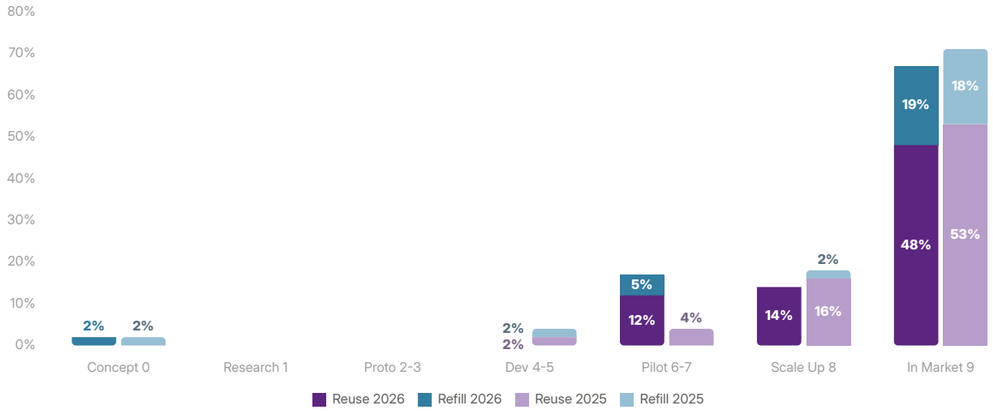
FIGURE 2 – YEAR OF CREATION



Year of creation. Each edition is one stacked column, split between reuse (purple) and refill (teal); the six columns of an edition sum to 100% of that edition's companies. A company active in both segments is counted in each.
Sample: 33 reuse and 16 refill companies in Belgium in 2026 · 36 reuse and 27 refill in the 2025 Belgian edition

Reuse and refill companies differ in age. Among reuse companies, just over half (52%) were created since 2020, against 44% in the 2025 Belgian edition, indicating a segment in which companies continue to appear. Bulk operators were created earlier: half of those answering were founded between 2015 and 2019, and only a quarter since 2020. The 2025 edition read the same way, more sharply still, with 59% created in 2015–2019. Belgium's bulk wave belongs to the second half of the 2010s and has not yet been followed by an equivalent one. The columns above show the same thing against the whole of each edition, which is where the shift is easiest to see: in 2026 the 2020–25 band is 35% reuse and 8% refill, where in 2025 it was 25% reuse and 13% refill. Company creation has shifted towards reuse. Neither segment consists only of start-ups: 6% of the reuse companies answering were founded before 1990, unchanged from the 2025 edition, and the oldest companies in the sample date back to the 1940s. Figure 3 shows that most of these companies are already fully in market. Created recently or not, the sample is made of operating businesses rather than early-stage ventures.

FIGURE 3 – SOCIAL READINESS LEVEL (SRL)



Social Readiness Level (SRL). Each edition is one stacked column, split between reuse (purple) and refill (teal); the columns of an edition sum to 100% of that edition's companies answering.
Sample: 31 reuse and 11 refill companies in Belgium in 2026 · 34 reuse and 11 refill in the 2025 Belgian edition



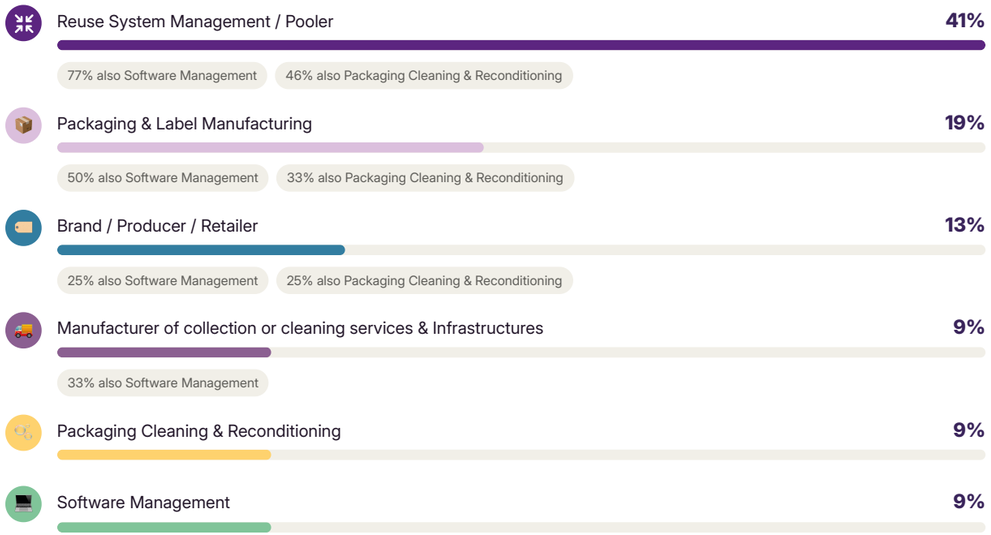
Both segments consist of operating businesses rather than experiments. Within the refill cohort, **nearly three-quarters of the bulk operators answering (73%) are fully in market**, exactly as in the 2025 Belgian edition, and 65% of reuse companies are too. Counting scale-up stage as well, 84% of the reuse respondents sit at SRL 8–9. Companies fully in market account for roughly two-thirds of each edition, almost none are below pilot stage, and the two editions show nearly the same profile. The only visible change concerns early-stage reuse companies, where those at pilot stage rise from 6% to 16% of the reuse sample. That reflects which companies answered this year rather than any loss of maturity: a few younger consumer-facing systems took part for the first time. The refill profile is unchanged between the two editions, on a small base of eleven operators answering the question in each.

REUSE SYSTEMS

ALL PPWR CATEGORIES COMPARED

MAIN ACTIVITY, EMPLOYMENT & REUSE SYSTEM TYPE

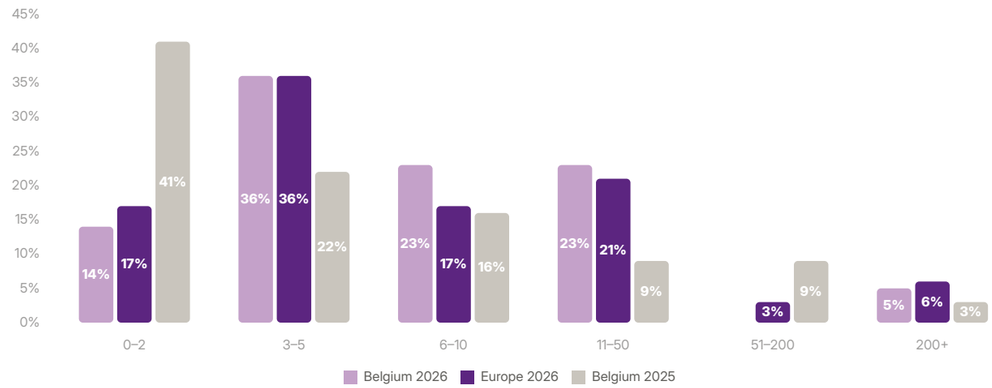
FIGURE 4 – REUSE, COMPANIES' MAIN ACTIVITY



Main activity, as % of the reuse companies answering. The chips show the share also running that activity in house, so they do not sum to 100%.
Sample: 32 companies surveyed in 2026

Reuse System Management / Pooler remains the single largest main activity (**13 of 32 reuse companies, 41%**): packaging & label manufacturing comes second (6 companies), while software management, packaging cleaning & reconditioning and collection infrastructure (3 each) show that every step of the reuse value chain is present within the country.

FIGURE 5 – REUSE, EMPLOYEES (FTE)

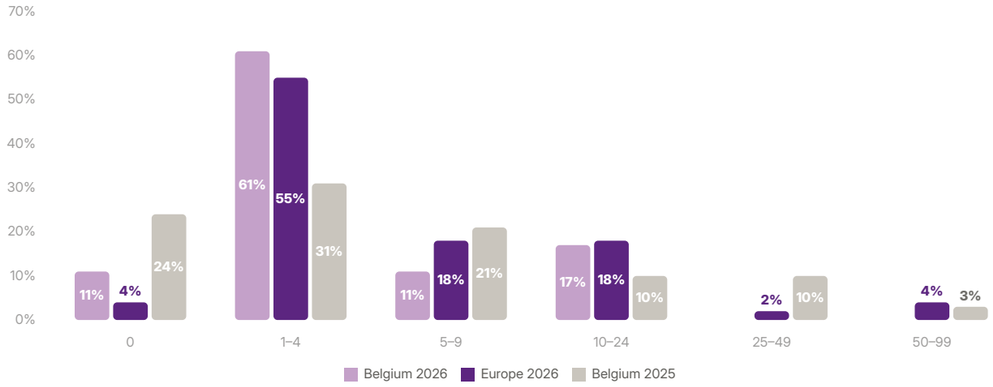


Full-time equivalents working on reuse, as % of the companies answering in each population. Belgium 2026 is compared with Europe 2026 and with the 2025 Belgian edition.
Sample: 22 companies in Belgium · 66 in Europe, surveyed in 2026 · 31 in Belgium in 2025



Reuse teams remain small: **the median company dedicates 5.5 full-time equivalents (FTE)** to reuse, half of the 22 answering have 5 FTE or fewer, and only one exceeds 50. The differences with the 2025 edition and with Europe should not be interpreted as a change in the market. Companies with 2 FTE or fewer account for 14% here against 41% in the 2025 Belgian edition, and the Belgian and European distributions are close this year where they were not last year – but the companies answering changed between the two editions, and 22 answers are too few to draw a conclusion about employment in Belgian reuse. The figure describes the companies in this sample: small teams operating systems that are already in market.

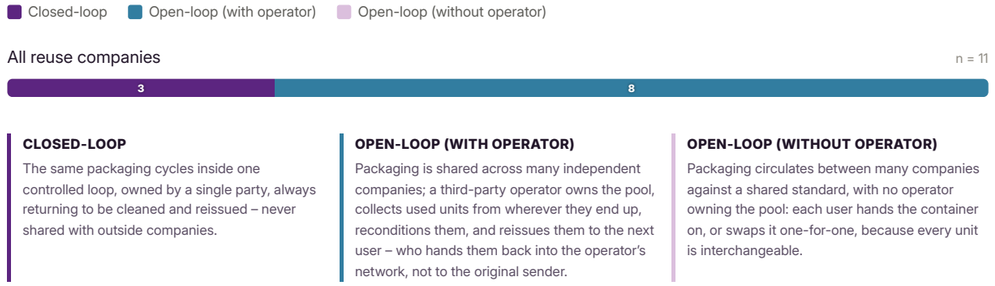
FIGURE 6 – REUSE, PLANNED RECRUITMENTS



Full-time-equivalent recruitments planned within two years, as % of the companies answering in each population. Belgium 2026 is compared with Europe 2026 and with the 2025 Belgian edition.
Sample: 18 companies in Belgium · 55 in Europe, surveyed in 2026 · 31 in Belgium in 2025

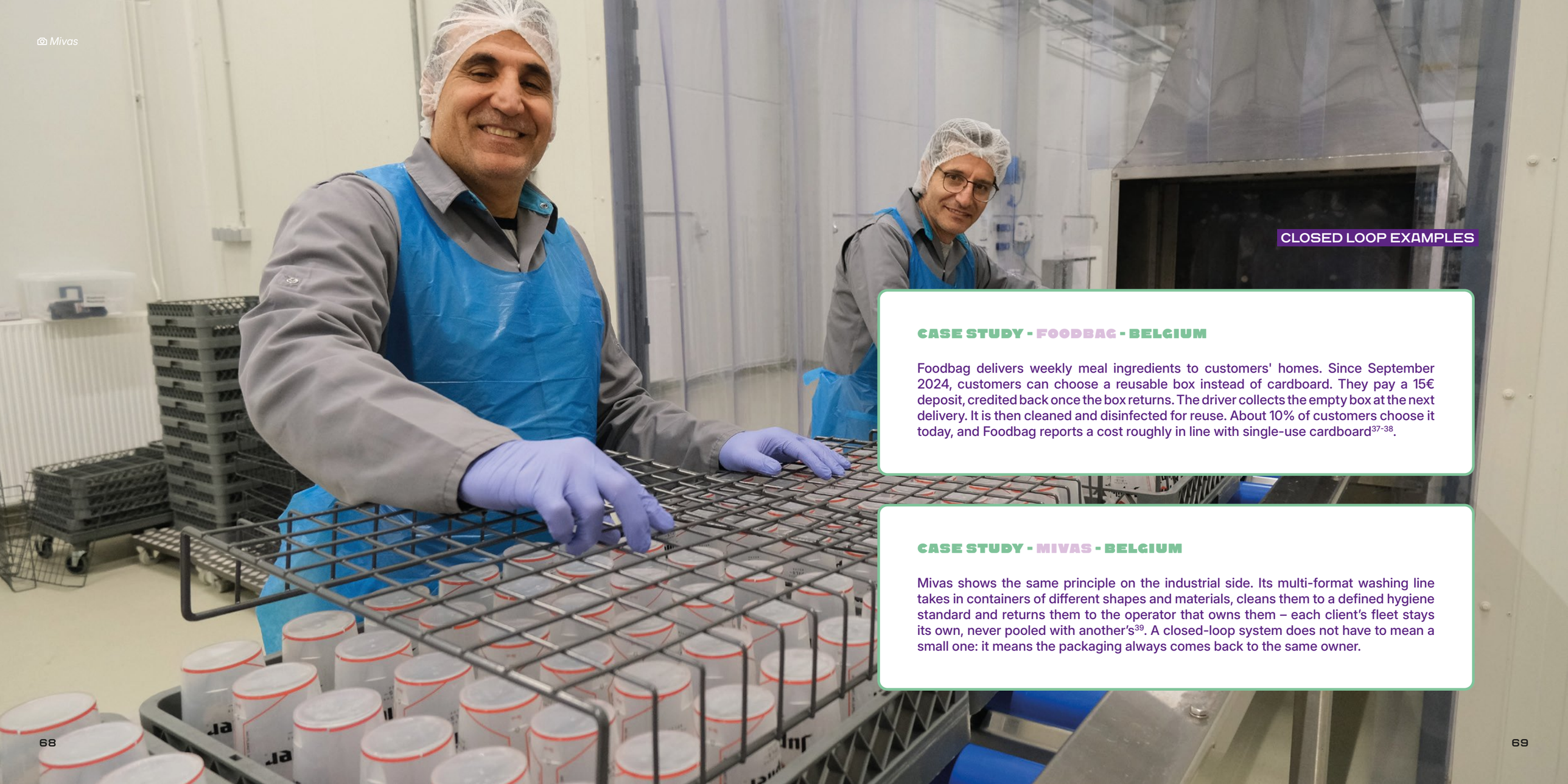
Recruitment plans remain robust: **16 of the 18 companies answering plan recruitments within the next two years** – around 84 positions between them, typically one to four per company, with the largest single plan at 20. The share planning no hire at all has fallen sharply, from 24% in the 2025 Belgian edition to 11%. The largest plans have, however, disappeared: last year 13% of Belgian companies planned 25 recruitments or more, and this year none does. Recruitment is therefore more widespread but more cautious than in 2025.

FIGURE 7 – REUSE, TYPE OF SYSTEM



Type of reuse system operated, across all reuse companies answering. Shown as number of companies; the definitions are given under the bars.
Sample: 11 companies surveyed in 2026

Only 11 companies answer this question, so the figure is shown for the sample as a whole rather than split by category. On that basis, **8 of the 11 run an open-loop system with an operator** – a shared pool of packaging managed by a third party – and the remaining 3 run closed-loop systems, in which the packaging always returns to the same owner. No respondent operates an open-loop system without an operator, in which standardised packaging circulates between users with nobody managing the pool. Belgium nevertheless runs the operator-free model at national scale, and always has: a lot of the returnable beer bottles circulate on a shared industry standard with no pool operator behind them. The Duvel Moortgat case study shows this inherited model, the standard beer bottle that any brewer can fill and any brewer can wash.



Mivas

CASE STUDY - FOODBAG - BELGIUM

Foodbag delivers weekly meal ingredients to customers' homes. Since September 2024, customers can choose a reusable box instead of cardboard. They pay a 15€ deposit, credited back once the box returns. The driver collects the empty box at the next delivery. It is then cleaned and disinfected for reuse. About 10% of customers choose it today, and Foodbag reports a cost roughly in line with single-use cardboard[37-38].

CASE STUDY - MIVAS - BELGIUM

Mivas shows the same principle on the industrial side. Its multi-format washing line takes in containers of different shapes and materials, cleans them to a defined hygiene standard and returns them to the operator that owns them – each client's fleet stays its own, never pooled with another's[39]. A closed-loop system does not have to mean a small one: it means the packaging always comes back to the same owner.



Foodprint

OPEN LOOP (WITH OPERATOR) EXAMPLES

CASE STUDY - BRING BACK - BELGIUM

Bring Back operates a pooled system of reusable glass bottles and jars for Belgian producers, distributors and consumers[40]. A jar filled by one producer, sold through one retailer and returned by one household does not go back to whoever filled it: it returns into Bring Back's network, is washed at its centre, and is reissued to whichever producer needs it next. The container is shared infrastructure, and the operator – not the brand – owns and governs it.

CASE STUDY - FOODPRINT - BELGIUM

Foodprint shows how the same loop is fed from the distribution side. As a distribution partner for producers and retailers, it selects products against an environmental and social charter, puts them on the shelf in returnable containers, and collects the empty containers – then sends them to Bring Back's washing centre rather than building a washing line of its own[41]. Two independent Belgian companies, one shared pool and one shared washing step: the clearest local illustration of why an operated open-loop system costs less per rotation than everyone running their own.

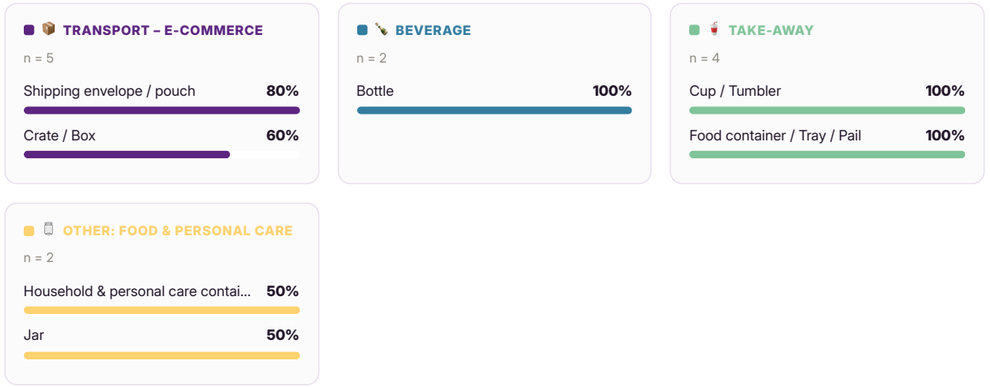
OPEN LOOP (WITHOUT OPERATOR) EXAMPLES

CASE STUDY - DUVEL MOORTGAT - BELGIUM

No respondent operates this model, but Belgium does – at national scale, through the returnable beer bottle. The brewing sector converged long ago on a handful of standard formats, above all the steinie, sold against a deposit and returned through the shops that sell it. Nobody owns the pool and no operator stands behind it. Each brewery finances its own collection – through bilateral agreements with the distributors, which ensure the collection – and washes what comes back – including other brewers' bottles, since every unit is interchangeable. Duvel Moortgat reports that around 88% of the beer it sells in Belgium is in returnable packaging[42]. A shared standard and shared discipline do the work an operator would – that is what places the model here.

PACKAGING FORMATS, MATERIALS & REUSE CYCLES, PURCHASE PRICE

FIGURE 8 – REUSE, PACKAGING FORMATS



Top reusable packaging formats per PPWR reuse category. A company can appear in more than one category and reports up to three formats, so shares within a category can exceed 100%.
Sample: 12 companies surveyed in 2026

Each category is dominated by the same formats in Belgium as at European level: **cups and food containers in Take-away (4 companies each)**, shipping envelopes (4) and crates (3) in Transport – E-commerce, glass bottles in Beverage, and jars alongside household & personal-care containers in the merged Other: Food & Personal care category. Per-category samples are small (1–5 companies), but the format map matches both the European edition and the 2025 Belgian finding of identical formats for identical applications.

FORMATS IN PRACTICE

A few respondents' own submissions show these formats reused in context:

- **Shipping envelope / pouch – Transport (e-commerce)**: Rajapack Benelux proved full operational compatibility of its reusable e-commerce packaging with Amazon FR (40,000 pieces) and Decathlon FR.
- **Cup / tumbler – Take-away**: VYTAL ran reusable cups at the FIFA Fan Fest and full-stadium roll-outs.
- **Cup – Take-away**: Borro (Belgium) runs reusable cups at stadiums and events on a digital deposit layer: fans order, return and are refunded automatically, with no app.
- **Flexible pouch – Other: Food & Personal care**: Moree's SmartPaks replace single-use multi-layer coffee bags from roastery to café.

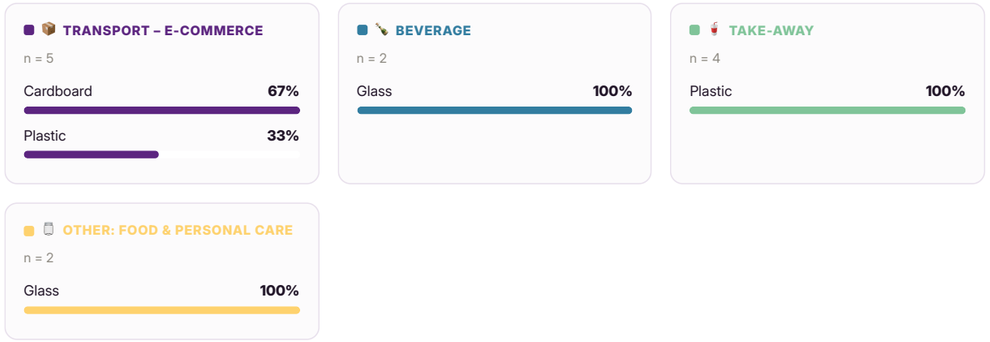


Moree



Packback

FIGURE 9 – REUSE, PACKAGING MATERIALS



Materials per PPWR reuse category, as each material's share of that category's material mentions. Each panel sums to 100%.
Sample: 12 companies surveyed in 2026

Materials follow the same pattern as formats: plastic accounts for all Take-away mentions (8 of 8), while glass dominates Beverage and Other: Food & Personal care. The only change concerns Transport – E-commerce, where cardboard is now mentioned more often than plastic (6 mentions against 3), whereas the 2025 Belgian edition recorded e-commerce packaging as 75% plastic. Given the sample size, this should be interpreted with caution. Pairing each format with the material reported in the same slot gives the combinations Belgian operators actually run. Twelve companies report both a format and its material, and three combinations lead: **plastic cups and plastic food containers, 4 companies each, followed by cardboard crates with 3**.

REUSE CYCLES: TOO FEW ANSWERS TO CHART, BUT CONSISTENT WITH EUROPE

Reported reuse cycles show the widest spread of any figure in the survey: for the same format and material, companies in the European survey report anything from a handful of trips to tens of thousands. Part of this reflects the difference between a packaging's theoretical design life and the cycles it actually completes in operation – even though the survey explicitly asked for figures "based on operational figures, not theoretical assumptions" – with a few cumulative lifetime totals stretching the top end further.

On the Belgian sample, the answers are too few to be charted. Only ten companies report a packaging format together with its material and a cycle count, and once those are grouped by format-and-material couple only three couples reach even three answers. The numbers are therefore given as text, and should be read as indicative of these respondents rather than as measurements of Belgian practice.

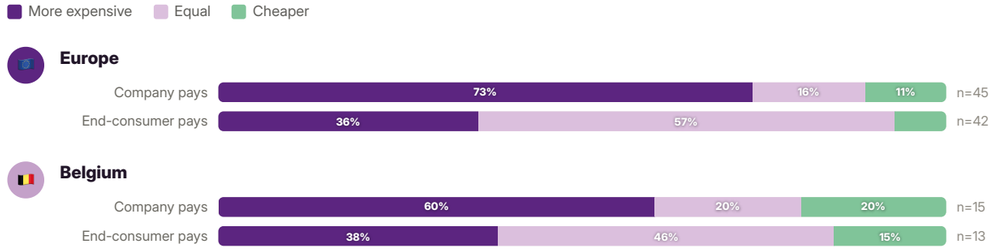
On that basis, and taking the median of each couple: **cardboard e-commerce boxes rotate about 1.4 times** (5 answers, all between 1 and 4), **plastic cups around 250 times** (4 answers, spanning 7 to 800) and **plastic food containers around 300 times** (3 answers, 200 to 400). Glass bottles and the remaining couples drew too few or too divergent answers to publish.

The PPWR's article 11 requires reusable packaging to be "designed to accomplish as many rotations as possible"[11]. That raises the question whether cardboard boxes that travel once or twice meet that test. The PPWR does not yet set a minimum number of rotations; the European Commission must set one by 12 February 2027 for the packaging formats most frequently used for reuse[11].

Compared with the European edition, which calculates the same format-and-material pairs on a sample several times larger[10], two of the three give similar results. Cardboard crates and boxes are barely reused in both (a median of 1.4 either way) and plastic food containers sit in the same 300–350 band. The only apparent difference concerns plastic cups, with a Belgian median of 250 rotations against roughly 50 in Europe. With only four answers, ranging from 7 to 800, this gap reflects the sample rather than a genuine difference in Belgian practice.

The Belgian answers do support one distinction of commercial importance. A cardboard box that travels once or twice is reusable in principle and single-use in practice whereas a plastic crate or food container reused several hundred times is where reuse becomes cheaper than single-use (figure 10). The difference is a factor of one hundred or more, and it is the main determinant of whether a reuse system is economically viable.

FIGURE 10 – REUSE, COST FOR THE COMPANY VS FOR THE CONSUMER



*The cost of reuse from both ends: the top bar is what the **company** pays for the packaging, the bottom what the **consumer** pays at the shelf. % of each bar's own respondents.*
Sample: 15 companies in Belgium · 45 in Europe, surveyed in 2026

Companies were asked to compare the cost of reuse with single-use from two perspectives: the price the company pays to rent the packaging (top bar) and the price the consumer pays at the shelf (bottom bar). Belgium follows the European pattern, in a less marked form. **60% of the 15 Belgian reuse operators answering report that, for a company, reusable packaging is more expensive than single-use, against 73% in Europe**; and at the shelf the premium still remains – 38% charge the consumer more in Belgium, 36% in Europe, while "equal" is the most common answer in both. The difference between the two Belgian bars shows that companies pay the acquisition premium and largely do not pass it on, effectively subsidising reuse. In the 2025 edition, 5 companies reported that reusable bottles were more expensive to buy or rent, and 3 reported the same for cups. However, these results should be used with caution, as the sample is not representative of the reuse industry: most of the companies concerned are working in two sectors that are not yet at scale: take-away and e-commerce. The cost advantage of single-use is due to a current lack of scale of the concerned reuse models, while reusable packaging is more competitive in more mature activities around pallets and crates.



The Ocean Package

CASE STUDY
THE OCEAN PACKAGE
GERMANY (OPERATING IN BELGIUM)

The Ocean Package illustrates the point at which the higher acquisition cost shown in figure 10 is offset, which depends on the number of rotations achieved.

The company runs what it describes as Germany's first closed-loop system for parcels[43]. The box is made entirely of polypropylene, around 70% of it recycled. Each box is digitally tracked, and monitoring software tracks where every unit is, what condition it is in and how often it has travelled.

A box is reused up to 20 times, which the company reports cuts the packaging's ecological footprint by about 95% and its CO2 emissions by up to 80% against single-use cardboard[43].

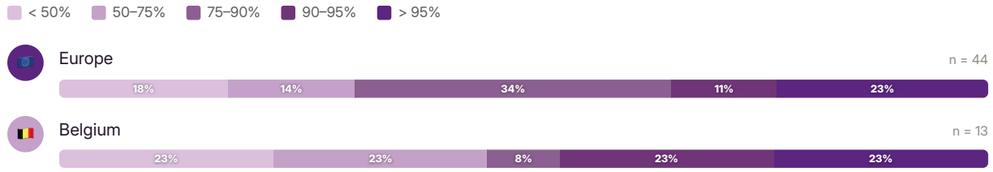
Tribu rents out children's toys and sends the same box to its next customer. The Ocean Package states that this is a financial advantage for Tribu from the third delivery[43]. Outfittery is an online clothing service. The company reports that more than 99% of its boxes come back to the warehouse[43].

The Ocean Package reports that its customers have seen up to 70% cost savings over single-use packaging when reuse cycles exceed 20 turns. One of its customers saved 500,000€ in 2025 by switching to reusable packaging.

Return rates, examined in figures 11 and 12, are therefore what determines whether the business case in figure 10 is achieved.

RETURN RATES

FIGURE 11 – REUSE, RETURN RATES



Reported return rates, as % of the reuse companies answering in each population. figure 12 breaks the same answers down by the mechanism that secures the return.
Sample: 13 companies in Belgium · 44 in Europe, surveyed in 2026

Belgian return rates are widely spread. Of the 13 respondents, **six report 90% or more and six report 75% or less**. All five take-away respondents report 90% or more. The three rates below 50% come from companies that reported no deposit. figure 12 looks at the deposit in more detail.

For events, 90% is written into two sets of rules. Flemish event law already requires 90% of reusable catering material to be collected[7]. From September 2026 the City of Brussels requires a 90% return rate on reusable cups, with the figures reportable on demand[9]. However, these rules apply to events only.

A study carried out for OVAM by the University of Antwerp lists guide values for take-away systems: a 90% return rate after one year and 95% after two. They come from a blueprint by Zero Waste Europe and Reloop[4].

CASE STUDY - AUCXIS STAR - BELGIUM

STAR, Aucxis's RFID reuse system, illustrates the mechanism behind the highest return rates shown in figure 11.

STAR: RFID enables large-scale reuse for sports venues and events. STAR enables fully automated reusable packaging systems for stadiums, festivals and public events by combining RFID technology with instant, automatic deposit refunds. Every reusable item is uniquely identified and linked to the original payment, allowing visitors to return cups without apps, tokens or manual intervention.

At Royal Antwerp FC, the system achieves a 98% return rate. Automated returns reduced manual handling by 75%, while faster service increased beverage sales by more than 7% during peak moments. The club replaces up to 1 million single-use cups per season, avoiding approximately 7 tonnes of plastic waste annually.

STAR has since been successfully deployed across a wide range of large-scale venues and events, including RSC Anderlecht, Royale Union Saint-Gilloise, KVC Westerlo, Tomorrowland, the Ghent Winter Festivities, Bevers & Bevers / Cupnation events (cyclocross, running events and festivals), and Edgbaston Cricket Stadium (UK) – providing organisers with higher return rates, lower operational costs, item-level traceability and reliable compliance reporting.



Aucxis



CASE STUDY
THE BELGIAN RETURNABLE BEER BOTTLE
BELGIUM

Belgium's oldest reuse system is also its largest.

How it works. Buy a crate of Belgian beer and you pay for the beer, plus a deposit on the bottles and another on the crate itself – typically **around 0.10€ per 25 cl or 33 cl bottle and roughly 4.50€ per crate**. Bring the empty bottles and the crate back and you get that money returned. The bottle is then washed and refilled again, before it is finally recycled.

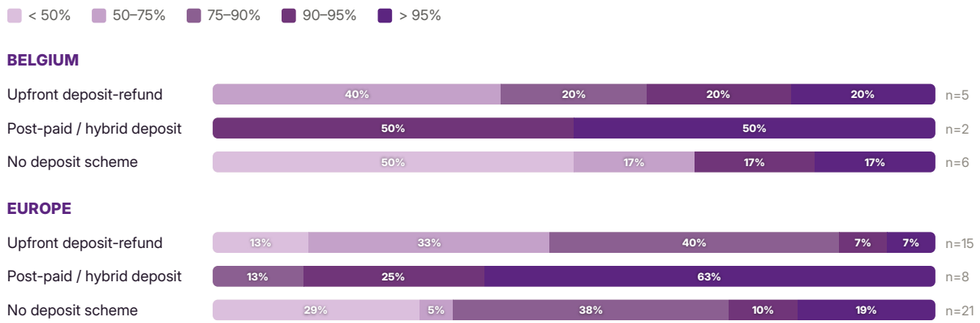
Who runs it. Nobody, centrally – and that is the point. Under the federal packaging levy (Book III of the law of 16 July 1993), drinks in single-use containers are taxed at 9.86€ per hectolitre and drinks in reusable containers at 1.41€ provided: the producer proves that the container is filled at least seven times, the packaging is recovered through a deposit and is actually reused, and that the deposit is at least 0.16€ for containers above half a litre and 0.08€ below[44]. The federal government announced in February 2025 that the levy on reusable containers would be abolished[49]; that change had not been enacted by mid-2026.

A majority of brewers are embracing reuse as part of their packaging models. In 2022, the Belgian Brewers federation reported that 67% of beer was sold in refillable packaging: 45% in deposit bottles and 22% in kegs[66]. The following are a few examples, not an exhaustive list.

Two of the country's largest brewing groups have made the same choice. Alken-Maes has used returnable bottles for Cristal, Maes, Grimbergen and Affligem for decades and put Desperados into returnable bottles in 2024, around nine million 33 cl bottles on the Belgian market that year[46]. Duvel Moortgat reported that around 88% of the beer it sells in Belgium comes in returnable packaging[42]. Some of these bottles are shared formats and some are a brand's own: the Steinie is, in Duvel Moortgat's words, the bottle most people associate with Duvel, the company accounts for more than 70% of the Steinie bottles sold in Belgium, and the format is also used by other breweries[42].

The deposit bottle is not confined to the large groups or to Flanders. In Wallonia, Brasserie de la Lesse is a cooperative brewery in Éprave, near Rochefort. It works with deposit bottles and collaborates with the neighbouring Rochefort Trappist brewery to have the bottles washed and put back into circulation. In Brussels, Brasserie Mobius uses the standardised APO bottle[48].

FIGURE 12 – REUSE, RETURN RATES BY DEPOSIT MECHANISM



UPFRONT DEPOSIT-REFUND

A deposit is charged when the packaging is issued and refunded when it is returned.

POST-PAID / HYBRID DEPOSIT

No deposit is paid when the packaging is issued, though a financial guarantee may be held. Users are charged only if it is not returned. Because it works by reconciliation over time rather than a charge at every transaction, it can carry far less operational friction.

The same return rates as figure 11, regrouped by how the return is secured, as % within each bar. The mechanisms are defined under the chart; each bar shows its own count.
Sample: 13 companies in Belgium · 44 in Europe, surveyed in 2026

Both companies running a hybrid deposit report a return rate of 90% or more. Of the five running a classic upfront deposit-refund, two reach 90%+ and none falls below 50%. Of the six that reported no deposit scheme, three sit below 50%.

Regarding reusable glass bottles, figures show that even an established mechanism can suffer from losses. Belgians who buy a deposit bottle are expected to return the empty bottle to the shop and recover their deposit, but some instead drop it in the nearest bottle bank – the public glass container intended for single-use glass packaging such as single-use jars and wine bottles – from which the glass is recycled rather than washed and refilled. Fost Plus measured in 2025 that **3.7% of everything in Belgium's glass banks is returnable deposit glass**: nearly 12,000 tonnes of perfectly reusable bottles destroyed each year, and about 5 million € of deposits that households paid and never claimed back[50].

UPFRONT DEPOSIT-REFUND IN PRACTICE

CASE STUDY - CMB MARIA & FRANZ - BELGIUM

La Conserverie & Moutarderie Belge (CMB) shows the upfront model working outside drinks, on an ordinary supermarket shelf.

CMB sells mustard, sauces, olives and bread spreads under its **Maria & Franz** brand in reusable standardised glass jars carrying a 15-cent deposit. The customer pays the deposit at the till and recovers it when the jar is returned. The return route is the notable element. The jars go back through **the same in-store machines that already take back beer bottles, yoghurt jars and drinks bottles**[51], requiring no new behaviour, no new location, no app, no extra sorting space.

Two Belgian companies make it possible. CMB set up **Foodprint** (see figure 7) as a separate organisation to run the reverse logistics, with the explicit intention of offering that service to other producers. The jars are then washed by **Bring Back** (see figure 7), which opened the first industrial washing plant for glass bottles and jars in Belgium in February 2022, washed more than 2.5 million containers in 2024 and, with the 2.5 million € it raised in August 2025, is moving to a new line in Grâce-Hollogne rated at up to 80 million containers a year[61].

This case suggests that the deposit is the simpler element of an upfront scheme. Its effectiveness depends on whether the customer can return the packaging at a location they already visit, and on whether washing capacity is available.



CASE STUDY - BORRO - BELGIUM

Borro illustrates a deposit that the consumer does not pay in advance.

At **Club Brugge's Jan Breydel stadium**, the club tested three competing systems between January and May 2025 before going live with Borro that July; installation took a week and a half. The stadium now handles **more than 45,000 cups per home game at a 93% average return rate**[52].

The mechanism is the point. Nothing is charged when a fan takes a cup: Borro places a **1.50€ temporary reservation on the payment card**, which is released automatically within minutes once the cup is returned[52]. A fan who returns the cup pays nothing and does nothing – there is no queue for a refund, no token, no app. Only a fan who walks off with the cup is actually charged.

The operational effect is measurable in ways that matter to a commercial operator: an estimated **9,889€ a year** less lost to deposit fraud, **4,832€ a year** saved in refund transaction fees, a **third fewer staff** needed on returns, and – because the queue moves faster – **7.0% higher spend per fan** and an 8.01% higher average transaction. "What made the difference was how smooth Borro works," says fan operations director Mattijs Buyck. "It's the most innovative system we tested."[52]

Borro

CASE STUDY - WOBZ - FRANCE (OPERATING IN BELGIUM)

The challenge: deploying reuse at one of Europe's most demanding festivals. At Tomorrowland Winter 2026, which brought together nearly 22,000 festival-goers at Alpe d'Huez, the objective was to deploy a reuse system able to absorb large volumes while guaranteeing a simple experience for users and smooth management for operational teams. To meet it, Tomorrowland deployed MagicLoop®, the digital-deposit solution developed by WOBZ, across its catering areas.

Reusable containers are identified by RFID, the deposit is digitised, and returns are centralised through MagicBin® collection points. The aim stays simple: make the act of returning as natural as single-use, while giving organisers precise visibility on how the system performs. Festival-goers eat from reusable containers tied to a digital deposit; once used, the containers are dropped into the collection points on site and the deposit is automatically refunded.

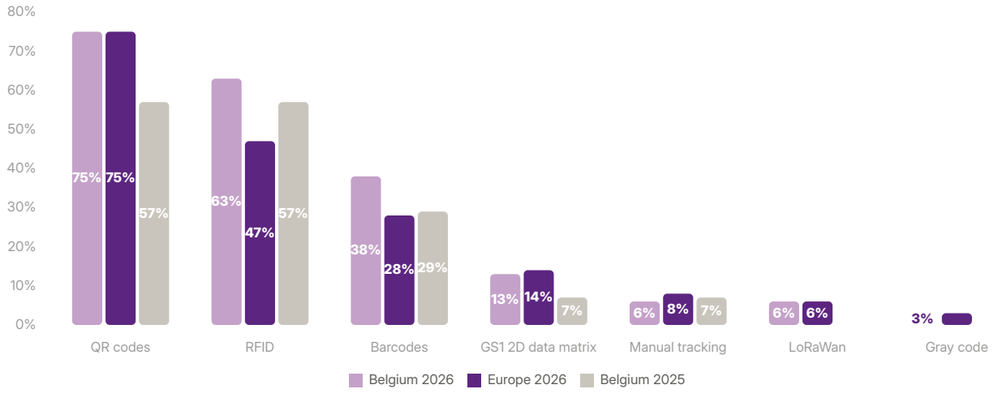
Behind that simplicity sits a complete operation: containers are identified, collected, washed and put back into circulation throughout the event, with MagicLoop® measuring performance in real time – flows, returns and recovery rates. The results: **28,800 reusable containers deployed, 22,791 reuse loops completed, and a 95% return rate**.

Beyond the numbers, the operation shows that reuse performance depends less on the container itself than on the quality of the system around it. When collection, logistics, traceability and user experience are designed together, reuse becomes an operational solution capable of meeting the demands of the largest European events.

These three systems – Borro, Aucxis's STAR and WOBZ – illustrate the same design principle from different angles: the best deposit systems can be almost invisible to consumers. When designed well, post-paid or hybrid deposits can become so seamless that they feel like no deposit at all – as seen in the Borro model highlighted in last year's edition.

OPERATIONS, LOGISTICS & REVENUES

FIGURE 13 – REUSE, TRACKING TECHNOLOGIES



Tracking technologies in use, as % of the companies answering in each population; a company can use several. Only individual technologies are comparable with 2025, which also charted combinations.
Sample: 16 companies in Belgium · 36 in Europe, surveyed in 2026 · 14 in Belgium in 2025

Tracking is now digital by default and Belgium is at or above the European level on every technology that matters: **QR codes 75%, level with Europe, RFID 63% against 47%**, barcodes 38% against 28%. The year-on-year move is the story: in the 2025 Belgian edition QR codes and RFID were tied at 57%, and both have risen – RFID by six points, QR by eighteen. Manual tracking has become residual (one company). This is consistent with figure 28, where technological innovation comes last among the forms of support companies request.



Wash-It

WASHING CAPACITY

The survey asked cleaning operators what share of their maximum capacity they currently use, and how large that maximum is.

Only six Belgian respondents run a washing operation and could answer, so these numbers are indicative rather than representative – they are reported as counts, not shares. **Three of the six run at about half of their maximum capacity, two at 10% or less, and one at 75%**. Not one reports being at or near saturation.

The conclusion is the same one the European edition reaches on a much larger sample: industrial washing lines exist and are running below capacity. Mivas's multi-format washing installation, shown under figure 7, is the clearest Belgian example. What is missing is the volume to fill them, which depends on demand and standardisation rather than on infrastructure. In most cases, a retailer or producer considering a reuse system could purchase this washing capacity from an operator who has some free capacity.



CASE STUDY - DUVEL MOORTGAT - BELGIUM

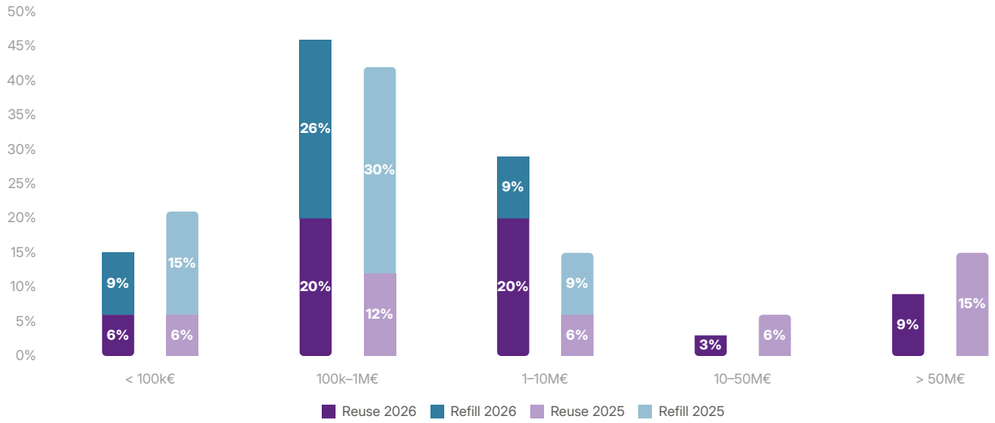
The scale. Duvel Moortgat, headquartered in Puurs-Sint-Amands, reported that around 88% of the beer it sells in Belgium is in returnable packaging – the steinie, the APO bottle or kegs[42]. Group-wide, 60% of sold volumes shipped in returnable packaging in 2025, against a target above 70% by 2030, and packaging accounts for 29% of the group's carbon footprint – which makes packaging one of the largest levers for scope 3 and reuse one of its key levers[42].

The discipline problem. The steinie is a shared format and Duvel Moortgat is its largest user: in its own words, "over 70% of all Steinie bottles sold in Belgium are sold by us. But the 'Steinie' format is also used by other breweries, some of which use labels that are difficult to remove in our washer.[42] As a consequence, to avoid contamination, the non-compliant bottles could be rejected from the reuse cycle and recycled".

The fix, and the lesson. The company's answer continued in two parts. In 2025, it installed a newer and improved sorting machine to better detect and separate non-compliant bottles before they enter the washer. This reduces rejection rates and reduces the contamination of other bottles in the same wash cycle. And, at sector level, they are still working with the Belgian Brewers association to raise awareness of the **importance of better technical sorting and sector agreements on washable labels.**

Source : Duvel Moortgat, Sustainability Report 2025 & 2024.

FIGURE 14 – REUSE, ANNUAL REVENUE



Annual revenue bracket. Each edition is one stacked column, split between reuse (purple) and refill (teal); the columns of an edition sum to 100% of that edition's companies answering.
Sample: 20 reuse and 15 refill companies in Belgium in 2026 · 15 reuse and 18 refill in the 2025 Belgian edition

Reuse and refill companies are of different sizes. Within the refill cohort, **9 of the 15 bulk operators answering turn over between 100k€ and 1M€, and none reports more than 10M€**; the profile is almost identical to the 2025 Belgian edition. Reuse companies are more widely spread – 35% of reuse respondents in the 100k–1M band, 35% in 1–10M, and a group of large industrial companies, with 15% above 50M€. The one year-on-year difference sits in that tail: the 2025 edition counted a third of its reuse respondents above 50M€ against 15% here. That is a change in which companies answered, not a contraction of Belgian reuse – the largest pan-European poolers are kept out of this figure and the reuse cohort is small either way. Both editions show the same distribution: refill companies cluster in the hundreds of thousands of euros, reuse companies extend into the tens of millions.



TRANSPORT PACKAGING BEYOND E-COMMERCE
THE ELEVEN PAN-EUROPEAN POOLERS SERVING BELGIUM

A very special thank you to the companies below that answered the call for this first edition with a B2B transport focus – their input is what makes this page possible (one company preferred not to be cited).

In the rest of this report, the Transport category covers only reusable packaging used to deliver online orders to consumers. This section covers the packaging that moves goods between businesses: pallets, crates and roll containers. In Belgium it is run by operators whose networks span the continent. Their employment, revenue and hiring figures describe European groups, not the Belgian market. Those figures are analysed in the 2026 European Reuse Barometer, which analyses this category in detail. But what the packaging is, how it is standardised, how it comes back and what it costs are as true on a Belgian market as anywhere else. This page reports these indicators for the eleven transport packaging poolers (not counting e-commerce packaging).

Who they are. Eight are pooling operators and three make the packaging. Ten are headquartered abroad, mostly in the Netherlands, France and Germany; the one headquartered in Belgium is DW Reusables, the crate and pallet maker in Bilzen. Eight were founded before 2005; three since 2020. They serve retail and fast-moving consumer goods above all (seven of ten), then chemicals and polymers, pharmaceuticals, horticulture, construction, electronics and events. The majority run closed-loop systems: the packaging circulates only between the operator and its own customers and never leaves the system.

What they run. Crates and boxes, all in plastic, and pallets, mostly in wood (nine mentions, seven of them wood), plus a metal roll cage, a plastic display pallet and an intermediate bulk container. Seven of the nine that describe their main format use a standard one – either built to fit an industry-wide pool, so that any customer's forklifts, racks and lorries can handle it, or complying with an official standard; one uses a design of its own and intends to align. Standardisation is the norm here.

How it comes back. Six of the eight report a return rate of more than 95%; the other two recover 50 to 75%. The packaging is usually rented or pooled under a contract, and a customer who does not send it back would end up being invoiced for it.

What it costs and how it turns. Five of the seven surveyed operators indicate that for a client, using a pooled pallet or crate costs less than using a single-use one. Cycles are consistent with a pooled asset: pallets report a median of 10 trips (5 to 35 for wood, 130 for a plastic one), crates a median of 25 (20 to 130), a roll cage 500 – figures are to be handled cautiously given the small respondent panel. As a comparison, Reusable Packaging Europe puts the European average at 56 rotations over an eight-year life, in a 25 to 120 range.

How they track and what they ask. Of six answering, four track their packaging with RFID chips, three with GS1 2D data-matrix codes, two with QR codes, two with Gray codes. Two report manual or non-automated tracking, with a spreadsheet or return labels. The GS1 standard appears here at a scale no consumer category in this report reaches. Five of ten describe their relationship with the EPR schemes – the bodies through which producers pay for the collection of their single-use packaging – as positive; One respondent asks for “uniformity and clarity across Europe” and notes that the PPWR does not say whether a closed-pool operator is a “manufacturer or producer”. Their policy asks include targets for reducing single-use packaging (seven of nine), taxes on single-use where a reusable alternative exists (six), enforcement of the rules that exist (five), legal protection of the operator's ownership of its packaging – so that a pallet cannot simply be kept or sold on by a customer – (four) and the removal of the exemption the PPWR grants to cardboard boxes (four).

ARDEN PLAST
CHEP
A Brambles Company
circular logistics
dw REUSABLES
ecklo
EURO POOL SYSTEM
PRS CARRYING IMPACT
MEMBER OF FABER GROUP
Rotom
facilitates your logistics
Runden Group

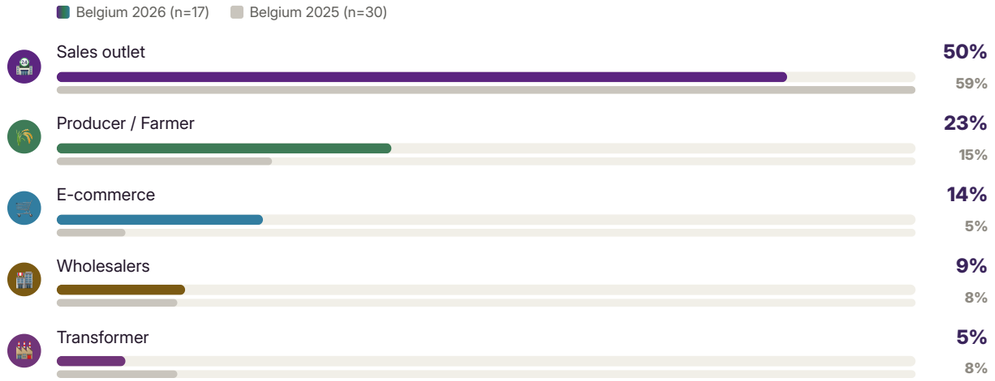
CHEP

REFILL SYSTEMS

All key indicators for the bulk (packaging-free) operators active in Belgium, compared with the 2025 Belgian edition where the same question was asked

THE OFFER ALREADY EXISTS

FIGURE 15 – REFILL, COMPANIES' ACTIVITIES



Refill activities, as each activity's share of all activities reported. Operators usually run more than one.
Sample: 17 Refill companies in Belgium, surveyed in 2026 · 30 in Belgium in 2025

CASE STUDY - OHNE - BELGIUM

OHNE is a Belgian cooperative of shops focused on making packaging-free shopping accessible. Founded in Ghent in 2015, OHNE grew from a single shop into a network of five stores in Flanders, alongside a Ghent-based webshop with cargo-bike delivery. The concept was born from a desire to reduce the amount of unnecessary packaging in everyday shopping and to offer an alternative to the conventional supermarket model.

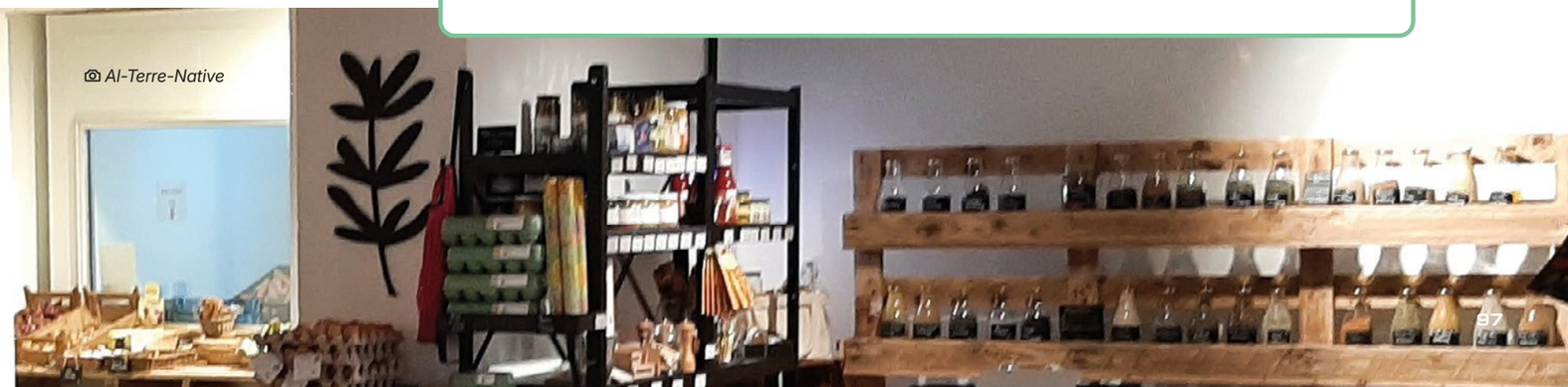
The principle is simple: customers bring their own jars, boxes, bags or bottles, weigh their empty containers and fill them with the products they need. At the checkout, the barcode ensures that customers pay only for the contents, not for the weight of their container. And if they arrive without a suitable container, they can use one of OHNE's reusable deposit jars, available in four sizes.

OHNE combines packaging-free shopping with a strong focus on organic and local products. The assortment ranges from everyday groceries to cleaning, personal care and household products. The aim is not simply to remove packaging, but to make more conscious shopping practical and accessible in everyday life.

After ten years, OHNE estimates that its customers have avoided around three million pieces of packaging. For the cooperative, this impact goes beyond the packaging itself: OHNE also works to strengthen short supply chains, local connections and collaboration through its cooperative model.

At its core, OHNE wants packaging-free shopping to become an ordinary, accessible way of doing groceries, without unnecessary packaging, but with plenty of choice, quality and connection.

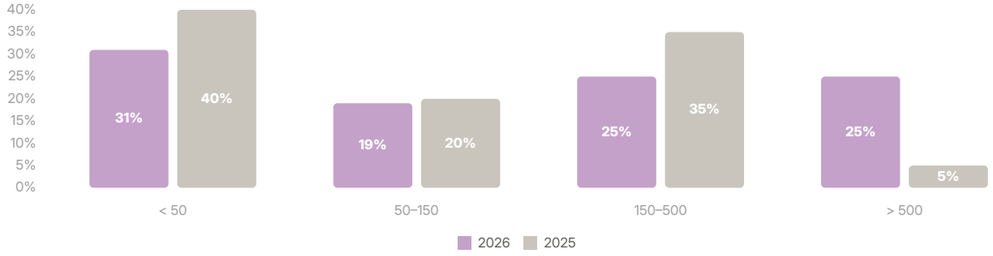




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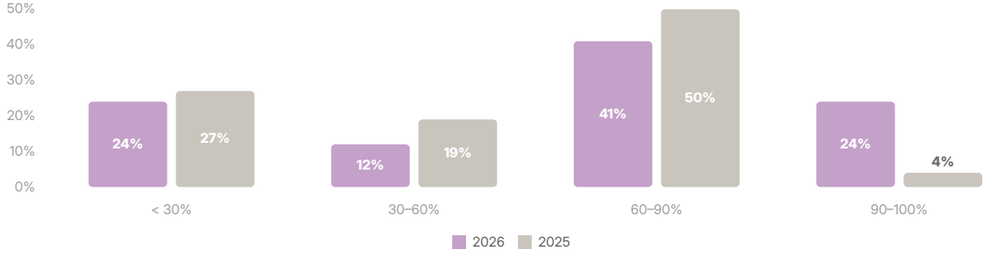
FIGURE 16 – REFILL, NUMBER OF BULK REFERENCES



Distribution of refill companies by number of product references offered in bulk (packaging-free) format, grouped into readable bands.
Sample: 16 companies in Belgium, surveyed in 2026 · 20 in Belgium in 2025

The Belgian bulk offer is substantial: **the median operator manages about 165 bulk references**, one in four offers 500 or more, and the largest assortment reaches 900. The assortments have grown since 2025, when only 5% of operators passed 500 references against 25% today, and 40% held fewer than 50 against 31% now. Given the small sample, though, these figures are directional rather than statistically representative.

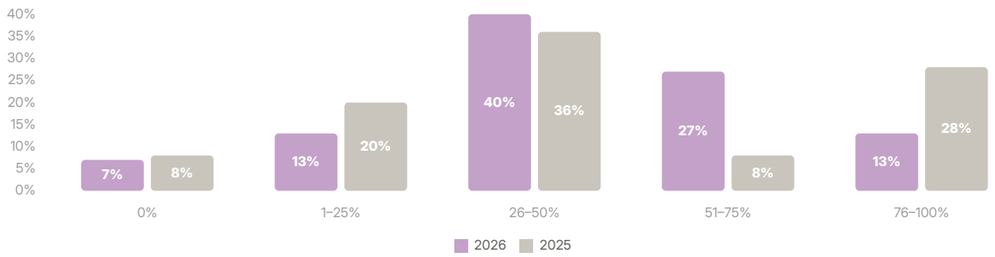
FIGURE 17 – REFILL, SHARE OF PRODUCTS IN BULK



Distribution by % of assortment offered in bulk format, grouped into readable bands.
Sample: 17 companies in Belgium, surveyed in 2026 · 26 in Belgium in 2025

Bulk is the core of these businesses: the median operator sells **70% of its assortment packaging-free** and 12 of 17 sell at least half. The distribution is close to 2025 – the 60–90% band dominated then (50%) as it does now (41%) – but the top band has grown sharply: 24% of operators now sell 90–100% of their range in bulk, against 4% last year.

FIGURE 18 – REFILL, SHARE OF LOCAL (NATIONAL) PRODUCTS



Distribution by % of Belgian origin among bulk product references.
Sample: 15 companies in Belgium, surveyed in 2026 · 26 in Belgium in 2025

Sourcing is local: the median operator takes half of its bulk references from Belgian producers. The same question was asked in both Belgian editions. Across the 33 operators who answered at least once, the average share of local references is 51% and the median 50%. **About half of what these bulk operators sell comes from a Belgian producer**. The 2026 results rest on 15 answers only, so changes from one year to the next should be read with caution. Ten of the 15 operators answering in 2026 source at least half of their bulk references locally. However, the share sourcing more than three-quarters locally has gone from 27% to 13%. With so few answers, this drop reflects who answered more than a change in sourcing. In both editions, that band is made up mostly of operators who describe themselves as producers or farmers and fewer of them answered this year.

Across the operators reporting both shares, food accounts on average for **86% of bulk references** and non-food – household and personal-care products – for the remaining 14%. The balance has barely moved in a year: the 2025 Belgian edition measured 87% food against 13% non-food on 26 operators. This split is representative of everyday household purchases and is mirrored in the Belgian Price Observatory. It reports that, in the consumer price index, food accounts for about 86% of everyday consumer goods and non-food products for about 14%[53].



JFA LaverVert

CASE STUDY
JFA LAVERVERT
BELGIUM

JFA LaverVert is a Belgian company that built its business in the non-food segment.

What it makes. Cleaning and laundry products – liquid detergent, floor cleaner, oven and stove-glass cleaners – built around its own Savon Noir de Namur, a black soap made from Belgian organic rapeseed oil and produced at its workshop in Maillen[54]. The products are designed as a genuine alternative to chemical cleaners, and they are sold in bulk and large formats rather than in single-use retail packs.

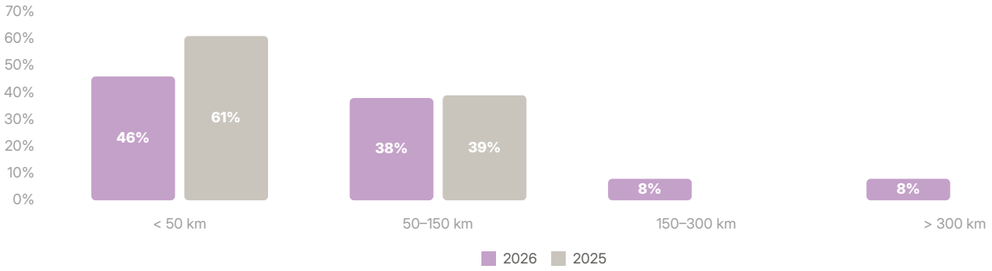
How it grew. The company started in 2019 by supplying bulk and zero-waste shops, which fitted its aim of cutting packaging waste. That choice turned out to be a growth strategy rather than a niche: it extended the same bulk and large-format approach to specialist retailers, guesthouses, care homes, businesses and the HoReCa sector.

What it says about the constraint. Its field experience is that interest in circular models is real, but that it is held back by logistical and economic constraints and by the absence of shared infrastructure – the same supply-side obstacle figure 23 puts first. The company is now working with its partner Le Fourgon to add a deposit system, and its Savon Noir illustrates a fully local loop, from Belgian organic rapeseed to a refillable container.

Consumers and professionals are ready to adopt reusable solutions, on the company's reading, when those solutions are simple, accessible and economically coherent.

A SHORT, LOW-WASTE LOOP THAT IS SIMPLE TO RUN

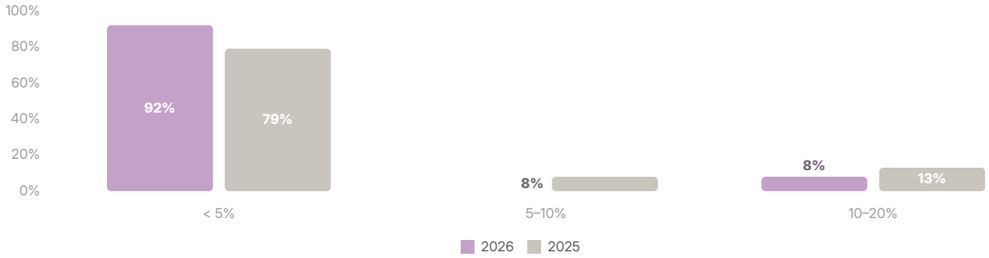
FIGURE 19 – REFILL, DISTANCE FROM PRODUCTION TO DISTRIBUTION



Distribution of local bulk product references by average distance from production to distribution point, sorted smallest to largest.
Sample: 13 companies in Belgium, surveyed in 2026 · 18 in Belgium in 2025

Supply distances are short: 11 of the 13 respondents source on average within 150 km of the point of sale, 6 of them within 50 km. As with figure 18, the two editions together give a figure worth quoting. Across both, **94% of Belgian bulk operators source within 150 km of the point of sale – 30 of the 32 answers over two years**, and 56% within 50 km. Bulk in Belgium relies on short supply chains and the two editions confirm this. The change is the same one figure 18 describes, and it points the same way. In 2025 every respondent was inside 150 km and none reported sourcing beyond 300 km; this year two are outside it. Supply chains remain short, but they are lengthening for a minority of operators.

FIGURE 20 – REFILL, LOSSES



Distribution by % of bulk products lost due to spillage, hygiene issues, or expiry.
Sample: 12 companies in Belgium, surveyed in 2026 · 24 in Belgium in 2025

Eleven of the 12 refill respondents that answered report losses of 5% or less. These are losses from spillage, hygiene problems and products that passed their expiry date. One respondent reports 15%. This is almost the same picture as 2025 (19 of the 24 respondents that answered reported 5% or less).



Nowa Market

FIGURE 21 – REFILL, AVAILABILITY OF EMPTY CONTAINERS



Share of companies making empty reusable containers available for customers to purchase in bulk (with or without a deposit).
Sample: 11 companies in Belgium, surveyed in 2026 · 21 in Belgium in 2025

A majority makes returnable containers part of the offer: 7 of the 11 respondents provide empty reusable containers, 5 of them against a deposit. What has changed since 2025 is the mechanism rather than the availability: **deposit-backed containers rise from 24% to 45% of operators, while free containers fall from 52% to 18%**. The share offering no container at all is broadly where it was – 24% in 2025, 36% now, on eleven answers. Given the small sample, though, these figures are directional rather than statistically representative. Based on those two years, the main change is more a shift to offering containers to consumers that may have come empty-handed. The Épices & Tout case below explains why this matters. One of the main obstacles to bulk is practical: the customer has to bring a container. A shopper who has forgotten a jar either buys the packaged version or buys nothing. Offering a container solves that. As a free container may not come back, a deposit container can give an extra reason for it to be brought back. Épices & Tout reports exactly that: customers who were not ready to switch to bulk began doing so willingly once a deposit system was in place. **Reusable containers are therefore what make refill accessible**. Figure 22 shows the return rates reported on these containers.



CASE STUDY - ÉPICES & TOUT - BELGIUM

Épices & Tout illustrates the role of the deposit container in bringing customers to bulk purchasing.

The shop. An organic grocery on the rue des Faubourgs in Arlon, in the far south of Belgium. It sells the majority of its range loose or in deposit-return containers: customers bring their own jars, which are weighed at the till so the tare is deducted from the price[55]. Around that sits a signature assortment of almost **200 spices**, fresh fruit and vegetables, dairy, butcher and bakery counters, drinks, dry goods, and household and hygiene products – one of the few Belgian operators taking bulk beyond the food shelf.

The finding. On the question every retailer asks – will customers really play along? – the shop's experience is unambiguous. It considers making bulk easy through a deposit to be essential, and reports that **many customers who had not been ready to switch to bulk began buying willingly once a deposit system was in place**. A container available at the cashier, priced so that it comes back, removes that barrier at the moment it occurs.

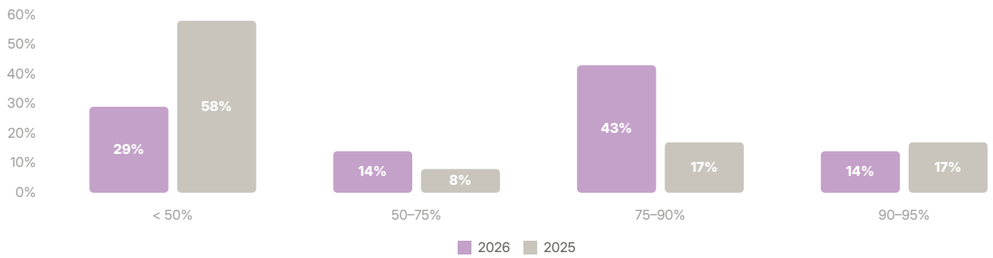
That is the mechanism behind figure [21]. In the shop's experience, a free container is generous but leaks, so operators stop offering it; a deposit container is offered indefinitely, because it returns. Reuse is what makes refill accessible to people who are not already committed to it – and every one of those customers is single-use packaging not sold.

The extension. In 2025 the shop took the model online: a local webshop of more than **700 organic and local references**, collect & go within two hours, and zero single-use packaging – distance selling being the hardest thing to do in bulk, since something has to carry the goods. It also runs regular workshops on zero-waste cooking and fermentation[55].



Epices & Tout

FIGURE 22 – REFILL, CONTAINER RETURN RATE



Distribution by average return rate of reusable containers at the point of sale.
Sample: 7 companies in Belgium, surveyed in 2026 · 12 in Belgium in 2025

The seven operators answering in 2026 report higher container return rates than the twelve answering in 2025. **The median reported return rate is 80%**, with 43% of operators in the 75–90% band and 14% above 90%. In 2025, 58% of operators sat below 50%. Over the same period, more operators moved to deposit-backed containers (Figure 21).



FIGURE 23 – REFILL, MAIN OBSTACLES



Main obstacles to implementing bulk, as % of the operators answering; several can be named. The two supplier options are merged and counted once per company.
Sample: 10 companies surveyed in 2026

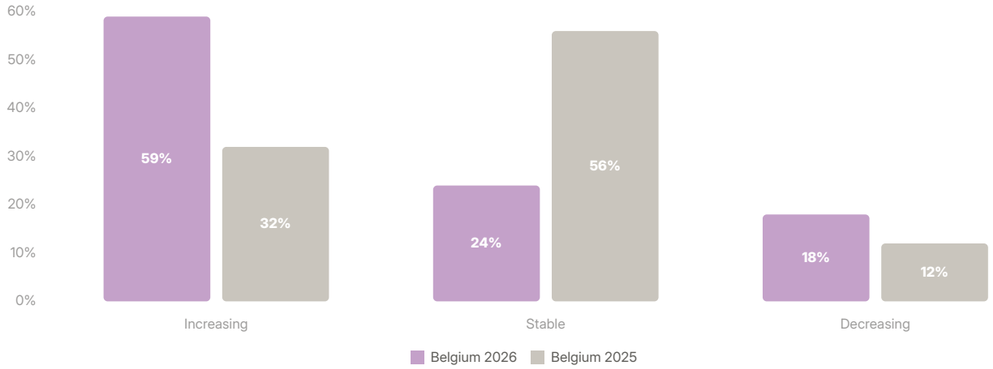
Taken together, the answers point to a single main obstacle: **the supply of goods to the shop**. Suppliers who do not deliver in bulk or reusable packaging, or who are hard to find, are named by **40% of the operators answering** – the single largest obstacle. Adding the absence of local suppliers (20%), half the operators are constrained by their sourcing. Constraints around customers' containers (30%) and logistical complexity and staff (20%) are the operational consequences of the same gap. Low consumer demand is named by one operator in ten. Hygiene and quality come next: pests or hygiene are named by 30% and quality by 10%, and one operator reports no obstacle at all.

This is where the 2025 Belgian edition already pointed. Its finding was that bulk and reuse are two halves of one transformation – bulk engages the consumer in preventing waste at the shelf, while reuse restructures the logistics upstream – and that neither reaches full scale alone[5]. The

risk it identified is visible in this figure: a bulk aisle can look packaging-free to the shopper while everything behind it, from the producer to the wholesaler to the back door of the shop, still arrives in single-use packaging. Bulk retail cannot fix that on its own, because it does not control it. What would fix it is more suppliers offering goods either in bulk or in reusable business-to-business packaging, so the chain is unbroken from producer to customer. No individual operator can bring this about. It requires shared infrastructure, pooled investment and standardised containers – the conclusion reached by the 2025 edition, and the subject of figure 27. At this stage of the market, collaboration and standardisation between operators appear more useful than competition, since the supply chain they lack is one that none of them can build alone.

IT PAYS – AND CUSTOMERS FOLLOW

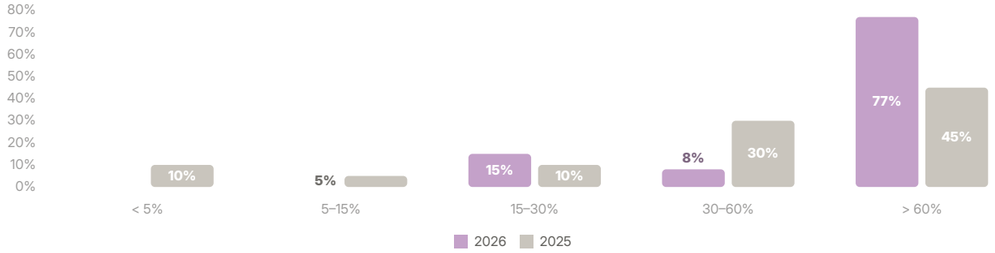
FIGURE 24 – REFILL, EVOLUTION OF THE BULK SHARE



How the share of bulk (packaging-free) products is evolving in respondents' business models (Decreasing / Stable / Increasing), shown as three separate single-column bars, each with its own % of respondents.
Sample: 17 companies in Belgium, surveyed in 2026 · 25 in Belgium in 2025

The trend is now upward. **Ten of the 17 operators report the share of bulk in their model increasing (59%)** against 32% in 2025, while the share reporting it stable falls from 56% to 24%. Decreasing stays a minority in both years. The 2025 Belgian edition read the same direction: bulk revenues growing on average 7% a year over 2022–2024, with 90% of operators reporting a stable or growing bulk share.

FIGURE 25 – REFILL, REVENUE SHARE FROM BULK



Distribution by % of revenue coming from products sold in bulk (packaging-free).
Sample: 13 companies in Belgium, surveyed in 2026 · 20 in Belgium in 2025

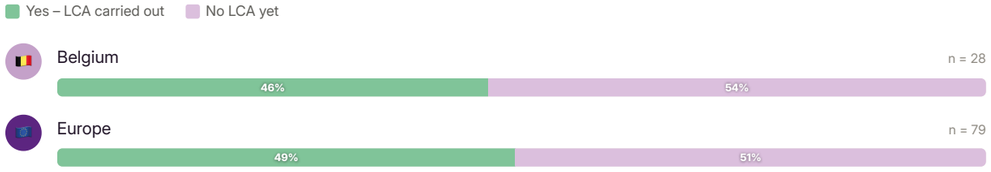
Bulk is the core business model of these operators: the median operator draws 80% of its revenue from bulk sales, 10 of 13 draw at least half, and **77% now draw more than 60%** against 45% in 2025 (one implausible outlier excluded). This may reflect the sample's growing reliance on bulk sales, though figures remain indicative given the limited sample size.

STATE OF THE REUSE & REFILL INDUSTRY

Environmental performance, industry maturity, barriers, and policy needs across the companies operating in Belgium

ENVIRONMENTAL PERFORMANCE

FIGURE 26 – LIFE CYCLE ASSESSMENTS



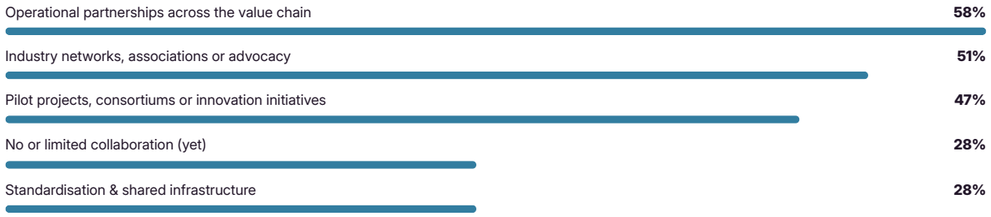
Share of the companies operating in Belgium that have carried out a Life Cycle Assessment (LCA), as % of those answering the question. More information on these LCAs - including the list of companies and links to every publicly shared study - is available on reusebarometer.com.
Sample: 28 companies in Belgium · 79 in Europe, surveyed in 2026

Just under half of the Belgian respondents answering (**13 of 28**) hold a Life Cycle Assessment – almost exactly the European level (49%, 39 of 79). No year-on-year read is possible: the 2025 Belgian edition did not ask the question, so this is the first Belgian baseline. The European experience suggests that this share changes slowly, and that publishing the studies matters as much as commissioning them. The French experience illustrates the value of publishing these assessments. ADEME's environmental assessment of deposit-based reuse for glass packaging – reuse scenarios modelled against single-use, testing return rates, packaging weight, transport distances and recycling rates – is cited across the French reuse sector and has guided how operators there design their systems[56]. Its value is not the verdict but the tipping points: the distances beyond which a loop stops paying environmentally, and the number of rotations a container has to complete before it beats a new one. **A published LCA allows one company's modelling to inform design choices across the industry, whereas an assessment that remains internal benefits only the company that commissioned it**. The relevant indicator is therefore not how many Belgian companies hold a study, but how many publish its findings.

OPPORTUNITIES, BARRIERS & POLICY NEEDS

While the rest of this report measures firm-level performance, this section looks at the conditions around the firms: how the industry organises itself, and what it says it needs to scale. Last year's edition described a sector held back by low consumer adoption and regulatory gaps, with collaboration across the value chain still "sporadic instead of systematic"[10]. This year's responses describe an industry that has continued to organise itself while awaiting a firmer regulatory framework.

FIGURE 27 – INDUSTRY COLLABORATION



Forms of collaboration companies take part in, as % of respondents. A company can take part in several forms at once, so the shares add up to more than 100%.
Sample: 43 companies surveyed in 2026

Most respondents report some form of collaboration: 31 of the 43 that answered (72%). The most common forms are operational partnerships (58%), industry networks (51%) and pilot projects (47%). Standardisation is again the least common form (28%), as at European level. On this point, six competing Belgian retail chains – Albert Heijn, Aldi, Carrefour, Colruyt, Delhaize and Lidl – formed a Reusable Packaging Coalition in late 2024[57] and now share a single standardised reusable fresh-produce tray with GS1 standard, with a 30-cent deposit, across seven supermarkets in Mechelen[17]. The pilot is explicitly designed to measure return rates, how long a tray stays out, and the logistics of scaling the model. Those results are not yet public: the pilot began in April 2026 and runs six months, so its conclusions land in October 2026.

Online retail ran a similar test. From February to July 2026, customers of the retailers Torfs and Juttu could receive their order in a reusable bag, against a deposit of 3.95€[67]. The project, called Everpax, used one neutral bag shared by the retailers. Customers returned the empty bag through the bpost network or a participating shop. The partners measured return rates and the number of reuse cycles. Initial results are positive. Karin Enzlin, bpost's Head of Sustainability, said: "We hoped that 10% of the consumers in the check out would choose for the reusable bag, and the results exceeded expectations with 12.5%."[71] Further results were still pending when this report was written. Fost Plus, a national partner of this Barometer, and Twintag, a respondent to this survey, were partners in the project[67].

CASE STUDY - DOTCH - GERMANY (OPERATING IN BELGIUM)

dotch illustrates collaboration on a large scale, with competitors organising jointly to create demand. What makes it notable is that the members are brand owners rather than reuse operators: demand-side pressure, not supply-side advocacy. Belgian brands are being consulted to gauge and confirm interest in selling their products in reusable packaging.

dotch runs a pooled reusable-glass system for pre-packaged food – standardised containers for oil, vinegar, syrup and condiments, and bespoke solutions for spreads and conserves. The cooking-oil system has been on the market since November 2023, with **more than 400,000 bottles produced and around 150,000 already circulating**. The company reports up to 50% lower CO2 emissions than single-use glass, rising to around 70% once a bottle completes 30 rotations – the same rotation-dependence the reuse-cycles section describes. Almost every major German organic wholesaler and retailer now lists the system, and it won the Mehrweginnovationspreis awarded by Deutsche Umwelthilfe and the Stiftung Initiative Mehrweg[58].

dotch coordinates a manufacturer alliance, Glas kann mehrWeg, of **24 producers and brands** – among them Kühne, Andros, Dittmann, Develey, Bio Planète, MANI and Brökelmann & Co. – publicly pressing for reusable glass to become an industry standard and calling on retailers to join a single shared system. The alliance puts the prize at 710,000 tonnes of packaging waste and 409,000 tonnes of CO2 avoidable each year in Germany alone.

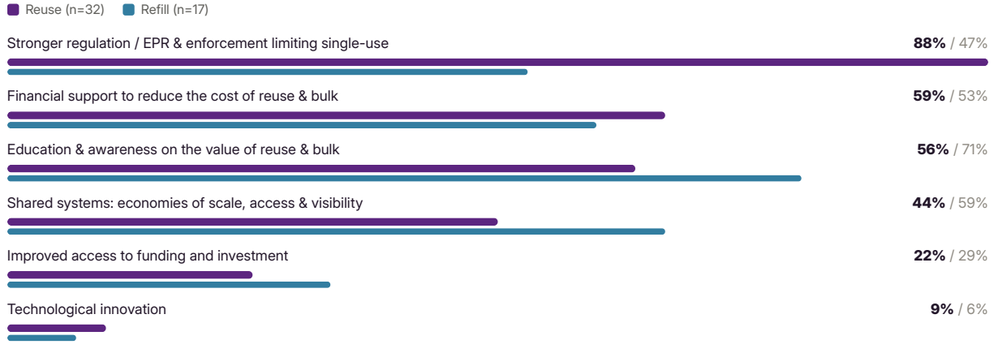
The public campaign runs at glaskannmehrweg.de. The alliance states that investing alone in return logistics and cleaning would be out of reach for a producer[58].





Repack

FIGURE 28 – TYPES OF SUPPORT NEEDED



Types of support that would most benefit companies, split between reuse and refill. Each series is a % of its own population; companies could name several, so the shares exceed 100%.
Sample: 47 companies surveyed in 2026

Separating reuse and refill companies reveals a difference that the combined figures did not show: the two groups do not request the same support. Reuse operators rank **stronger regulation, EPR or enforcement first (88%)**, ahead of financial support (59%) and education (56%). Refill operators rank regulation fourth, at 47%, and put **education and awareness first at 71%**, followed by shared systems (59%). The difference between the two groups is considerable – 41 points on regulation, 15 points in the other direction on education. The survey did not ask companies why they chose one form of support over another. Concerning bulk, answers should be read alongside figure 23. The five operators who name suppliers as an obstacle in figure 23 all chose education and awareness here. The education option covers companies as well as consumers.

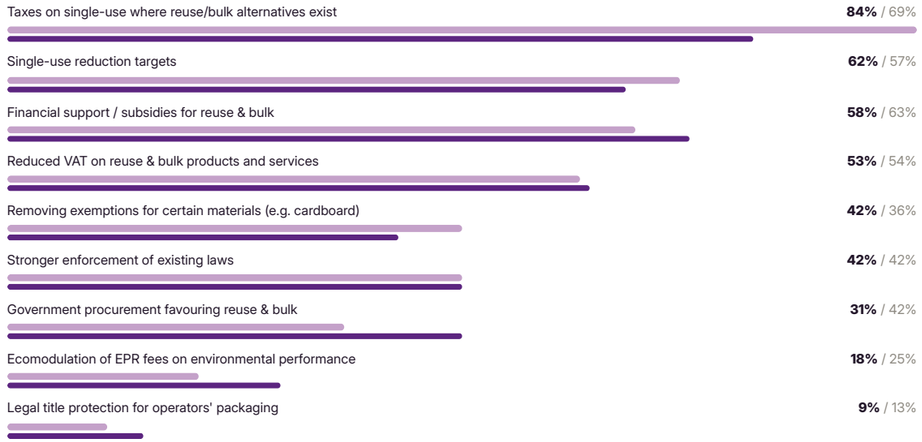
Technological innovation comes last for each (9% and 6%) – consistent with figure 13, where Belgian tracking adoption already runs at or above the European level. And shared systems matter more to refill (59%) than to reuse (44%), which is the same supply-chain gap figure 23 identifies, seen from the other end. One apparent contradiction should be noted. Refill operators put education first, yet when asked in figure 23 what actually obstructs them, supply-side answers dominate and low consumer demand is named by one operator in ten. Consumer demand may therefore be less absent than operators perceive, and, as figure 21 suggests, more readily activated by a deposit container than by an awareness campaign.

FIGURE 29 – EPR SCHEMES & POLICY MEASURES

Relationship with EPR schemes today (answers in the survey's 1–5 order)



Most effective PPWR / national measures to support scaling



Top: how companies rate their relationship with EPR schemes (one answer each). Bottom: the measures they consider most effective (several can be named). Belgium against Europe.
Sample: 41 companies (EPR relationship) · 45 companies (measures), surveyed in 2026



Measured against Europe, Belgium's policy picture differs in two specific ways. On EPR the headline is similar – 41% of Belgian respondents report a positive relationship against 47% in Europe – but the gap sits in one band. **Some 27% of Belgian respondents say they lack sufficient visibility on what EPR schemes do on reuse and/or refill, against 13% in Europe: twice the European rate**. This is notable in a country with one of Europe's oldest and most developed EPR systems. Belgian respondents are also markedly less negative outright (5% report no relationship or negative effects, against 11% in Europe). The Belgian difficulty with EPR is therefore a lack of clarity for operators about where they stand. On measures, Belgian respondents favour measures that raise the cost of single-use more strongly than European respondents do. **Taxes on single-use where a reusable or bulk alternative exists reach 84% support by the survey respondents operating in Belgium against 69% in Europe** – the largest divergence in the list – followed by single-use reduction targets (62% against 57%) and removing material exemptions such as cardboard (42% against 36%). Belgium is slightly below Europe on the money measures: subsidies (58% against 63%) and reduced VAT (53% against 54%). The pattern is consistent: Belgian companies would rather see the price of single-use packaging rise than the price of reuse be subsidised.

CONCLUSION & RECOMMENDATIONS

What the Belgian data adds up to – and what each actor should do next

This edition closes on a country with two reuse economies. The first is the inherited system that works at national scale. In 2025, 43% of the household packaging placed on the Belgian market was reusable, measured by weight[1]. Fost Plus reports that “99.3% of declared reusable packaging by weight is drinks packaging” and that it “is mainly glass”[12]. It names “glass bottles for beer and soft drinks” as the most well-known example[13].

In the same year, 82% of commercial and industrial packaging in circulation – pallets, crates and drums – was reusable, again by weight[1-14]. The eleven pan-European transport poolers that operate in Belgium and that are shown separately in Section 7 highlight this sector. Six of the eight that report a return rate recover more than 95% of their packaging.

The second reuse economy is the one represented by 48 of the 59 companies surveyed for this report. Some build their own infrastructure. Others use the inherited system. For instance Maria & Franz’s jars can be returned using the reverse vending machines that are also used for beer and soft drink bottles with a deposit[13].

Among the 17 bulk operators, 13 reported the share of their revenue that comes from bulk. The median is 80%.

With 28 Belgian-headquartered respondents, this report reflects data of the survey’s second-largest national reuse cohort in Europe, after France.

The timing matters. The PPWR has applied since 12 August 2026, but its reuse and refill obligations start later[11]. From February 2027, take-away outlets must let customers bring their own container. From February 2028, they must offer a reusable option. The first reuse targets apply from 2030[11]. Two rules are still to come in 2027: the minimum number of times a packaging must be reused, and the method for calculating the targets[11]. In this report's reading, the time to prepare is now. The six companies reporting on washing use between 5% and 75% of their capacity. What the sources describe as missing is different. The final report of Flanders' Green Deal on packaging finds that the lack of packaging standards and of a shared collection infrastructure hinders efficient return logistics[19]. These are two key points to address in the coming years.



Aucxis



Corplex

Transport. Reuse is at the heart of the eleven pan-European poolers' activity: seven of eight are fully in market, six of eight recover more than 95% of their pallets and crates, seven of nine work on a standard format, and five of seven make reusable packaging cheaper than single-use. What remains to be done there is not to build the system but to continue extending it beyond the pooled pallet and crate. The PPWR's transport target covers a longer list of formats – foldable boxes, trays, pails, drums, canisters, intermediate bulk containers, pallet wrapping and straps. One change has been made since. On 25 February 2026, the Commission adopted a delegated act exempting pallet wrapping and straps from the 100% reuse requirement, which applies within a company and between companies in the same Member State. They remain covered by the 40% target[59]. From 2030, the Regulation also sets a 10% target for the boxes that group products into a distribution unit. Cardboard boxes are exempt from both targets. The nine poolers that described their packaging reported pallets, crates and boxes, and one intermediate bulk container. None reported trays, pails, drums, canisters or flexible formats, which are also on the regulation's list[11]. The poolers show one way of setting up pools: one standard per product, owned by the operator, collected where the flow makes it easy. To further extend reuse, the cardboard exemption itself is the one Belgian respondents of this survey would most like to see removed: 42% support ending material exemptions, against 36% in Europe (figure 29).

Beverage. Two reuse economies were presented in the Executive Summary. The inherited one is large: in 2025, 43% of household packaging placed on the Belgian market was reusable, by weight[1]. The five Beverage respondents describe only the newer economy. They are mostly recent companies: four of the five were founded since 2020. Three are in market, two at pilot; the two return rates reported are 50–75% and 75–90%, both secured by a deposit refunded at return. New entrants that have no washing line of their own can share costs by relying on external washers such as Bring Back, which opened in 2022 and washed 2.5 million containers in 2024. What this category needs is spelled out by Coca-Cola's own June 2026 survey: 48% of Belgians think every glass soft-drink and water bottle belongs in the glass recycling container and only 60% know that many are washed and refilled. Fost Plus found that in 2025 about 3.7% of the glass in public glass containers was returnable bottles, almost 12,000 tonnes. Consumers had paid a deposit on them. Fost Plus gives one reason among others: people do not check the return logo on the label[50]. It adds that the logo is not yet well known to everyone. The PPWR requires reusable packaging to carry a label stating that it is reusable, from February 2029 at the earliest[11]. What will help is that the label will be the same across the European Union: the regulation asks the European Commission to define it[11]. Fost Plus proposes better information on the product and where bottles are returned. In March 2026, Fost Plus and the intermunicipal company EcoWerf launched a first test campaign in three Flemish municipalities. It uses stickers on the glass containers and posters at nearby supermarkets. Fost Plus places this campaign within its action plan to make reusable packaging better known to consumers[63]. Producers are acting as well: Coca-Cola launched its own awareness campaign on refillable bottles in June 2026. No results of these campaigns were available for this report.

Take-away. Twelve respondents, mostly mature: eight fully in market, two scaling up, two at pilot stage. Only five of the twelve reported a return rate and all five report 90% or more. Four serve closed environments like events. Only Vytal, which runs reusable containers in open environments such as restaurants, states on its website that its technology enables a 99.2% return rate[60]. With five answers, these rates inform but do not represent the take-away industry. Five companies run a deposit (three paid up front and refunded on return, two charged only if the cup is not returned); six of seven track by RFID. The formats seem to have settled – plastic cups and plastic food containers, four mentions each – and washing runs at 50 and 75% of capacity where it is reported. The constraint is not technology but cost, and behind cost it is volume. A reusable item only becomes cheaper than single-use once it has been used enough times and the system scales. The systems that have not yet reached that volume cannot yet match the price of single-use, however well they work. On the technical side, the category is ready for February 2028, when every take-away outlet – except micro-enterprises – will have to offer its customers a reusable option. How it is offered will matter as much as whether it is offered: Billie Cup, the café network profiled in Section 5.3, tells its new partners that the system works better when the reusable cup is the only cup on offer, because that is a clear message to the customer. The regulation asks for a reusable option; the network's own advice is to make it the default and let single-use go. Some chains already work this way. Since the end of 2023, the Pathé cinemas in the Netherlands serve their drinks in reusable cups only, without a deposit[69].

Other: Food & Personal care. Seven respondents, three of six still at pilot, five of seven founded since 2020. Bring Back's CEO names the diversity of jar formats, which keeps washing manual, and the absence of an automatic deposit on jars, unlike in Germany[61]. Where it works, the operators borrowed the beer, water and soft drinks bottle's infrastructure: CMB's Maria & Franz jars go back through the supermarkets' existing bottle machines in Eupen. One standard set of jars shared across chains, a deposit on it by default, and return through the take-back points supermarkets already run for the bottles could open a new opportunity for reuse in Belgium.



Circular Logistics

Refill. Seventeen operators, eight of eleven fully in market and 9 out of 16 founded between 2010 and 2019. Bulk is their main activity: a median 80% of revenue, sourced locally – within 150 km for 11 of 13 respondents.

Seven of the eleven operators answering offer empty containers as a back-up for customers who come without one. Five of them ask for a deposit and two do not. Seven operators reported a return rate on these containers; the median is 80%. In Épices & Tout's experience, it is what wins over the shopper who has not yet made bringing a container a habit – a habit that takes months and starts with one product (figure 21). Whether this container should be given with a deposit or not is not answered by this survey as the number of respondents is not representative. Seven operators reported a return rate, and the two without a deposit report rates as high as those with one.

Upstream, the obstacle is the supplier, not the customer: what holds operators back is finding suppliers who deliver in bulk or in reusable business-to-business packaging instead of relying on single-use packaging (figure 23).

The report draws two conclusions: containers made available at the shelf support consumers who are not yet used to bringing their own, and bulk operators are looking for suppliers who can deliver goods without single-use packaging.

Where growth and innovation are needed. Though selling in bulk is quite advanced in the 'Other: Food & Personal care' category, products of this category are rarely sold in reusable containers. Innovations in this field like Le Fourgon's returnable packaging delivered to the door are starting to push the market. This category is not backed by specific PPWR reuse targets. However, as many products of this category are already sold in glass jars – personal care products, food preserves in jars – developing reuse there can be quite suitable. Moreover, reducing the use of single-use glass packaging can be especially relevant to reduce packaging waste which is calculated by weight.

What happens next is distributed across four groups of actors:

- **Policymakers** hold the decisive lever this sample asks by 84%: price single-use where reusable or bulk alternatives exist (84% of Belgian respondents – the strongest score in the survey), and enforce the PPWR as adopted. Regulation is the reuse industry's own first ask – 88% of reuse companies rank stronger rules, EPR or enforcement ahead of money and education – while refill operators ask first for education and awareness (71%).

- **Retailers and producers**: Reuse and refill solutions already exist in Belgium – though some might need to be further enhanced to maximise efficiency. As the first PPWR obligations start in February 2027, and the first reuse targets apply from 2030[11] and as 80% of the Belgians surveyed for Fost Plus think there is too much disposable packaging[2], the time to prepare is now. Most of the responding companies are already collaborating on this topic one way or another. Standardisation, however, is the least common form of collaboration in Belgium (28%) and a crucial gap to close to improve logistics and reduce costs. A great example involving collaboration and standardisation that addresses the PPWR's Annex V restrictions of single-use plastic packaging for fruits and vegetables is the trial by the country's largest retailers. The six competing chains have trialled a standardised reusable tray, used for mushrooms in this first phase, with a 30-cent deposit across seven Mechelen supermarkets. However, retailers and producers have the opportunity to continue pushing such initiatives in order to increase the offer of products sold through reuse and refill. This will ensure that the bulk offer does not get restricted to specialised stores and reuse only to beverages and transport packaging. Even though food and personal care products are not specifically targeted by reuse or refill targets, developing such offers for products of these categories, especially the ones sold in glass packaging, can be a powerful way to significantly reduce packaging waste – calculated by weight.

- **Investors** should note that washing capacity exists among respondents and is not full. Six companies reported how much of their maximum washing capacity they use. One reported 75%, three reported 50%, and two reported 10% or less. These companies do not belong to one packaging category: they are active in Beverage, in Other: Food & Personal care, in Take-away and in e-commerce packaging. In each of these categories, at least one company reports using half of its capacity or less, and none of the six reports more than 75%. Given the small sample, these results should be read with caution. The tracking exists – three companies in four use QR codes, level with Europe, and 63% use RFID, against 47% in Europe. And the companies are real businesses, not pilots: of 33 reporting revenue, 15 are between 100,000€ and 1 million €, 10 between 1 and 10 million €, and three above 50 million €. What is missing is demand, and the PPWR's obligations are likely to create it – the Flemish Green Deal's own review of 59 reuse projects says binding rules are what gives investors the guarantee to release funds, provided the rules then stay stable long enough to be paid back[19]. Therefore, investment is needed to bring reuse to scale. Investing now is not a bet on a new technology but an opportunity to set up shared loops – pooled containers, common return points – that companies will need within four years. Last, the Green Deal's review highlights that because of the small size of the teams – reuse models are run by a median of 5.5 people – the loss of one key employee is a risk of failure[19].

- **Consumers** follow wherever the system is built for them: Belgian bulk shops recover a median 80% of their returnable containers, and the best-documented stadium deposit systems report recovering 93% to 98% of their cups at Club Brugge and Royal Antwerp. However, even an established system requires constant optimisation: Fost Plus found in 2025 that 3.7% of what Belgians put in the glass bank is in fact returnable deposit bottles – almost 12,000 tonnes and some 5 million € in unclaimed deposits a year[50]. When a reuse or refill system is available, the main constraint seems to be communication rather than consumers' willingness.



Moree



A NOTE ON CONFIDENCE (AND AN INVITATION)

The figures in this report are self-reported by the companies surveyed and pass three checks before publication: automated consistency tests against previous editions and peers, comparison with independent external benchmarks (national EPR data, trade statistics, published trials – see the Bibliography), and this note. If a figure looks inconsistent with what you know – as an operator, a scheme, a researcher – please share it with the editorial team: hello@reusebarometer.com. Confirmed corrections are reflected in the next update, turning outside scrutiny into part of the method rather than a risk to it.

Le Fourgon

APPENDIX

Definitions, list of indicators, and bibliography

DEFINITIONS

PACKAGING-LINKED DEFINITIONS - *Packaging, plastic, return rate, reuse*

PACKAGING (PPWR)

An item, irrespective of the materials from which it is made, 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. This includes items designed to be filled at the point of sale to dispense a product – also referred to as "service packaging" – and single-serve tea, coffee or beverage units 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. A key indicator with major impact on the economics of reusable packaging, as it determines the number of reusable containers that need to be re-purchased. A return rate above 95% should generally be pursued to make a system economically feasible for a system provider.

REUSABLE PACKAGING (PPWR)

Packaging placed on the market is considered reusable where it has been conceived, designed and placed on the market with the objective of being reused multiple times; can accomplish as many rotations as possible under normally predictable conditions of use; fulfils applicable health, safety and hygiene requirements; can be emptied or unloaded without damage that would prevent further reuse; can be reconditioned per Annex VI, Part B while maintaining its function; allows for affixing labels and safety/traceability information; and fulfils the recyclability requirements of Article 6 so that it can still be recycled at end of life.

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 reuse either in a closed-loop or open-loop system – such as a deposit and return system that ensures packaging is collected for reuse.

ROTATION (EUROPEAN UNION)

The full cycle a reusable packaging item accomplishes, from being placed on the market together with the product it contains, protects, handles, delivers or presents, to the moment it is ready to be reused 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: an international standard, a European standard, a harmonised standard (adopted at the Commission's request for Union harmonisation legislation), or a national standard.



Pizzycle

PACKAGING TYPES - *Bottles, crates, cups, pallets...*

BEVERAGE BOTTLES

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

CRATES

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 other distance sales channels to the final user – generally considered as transport packaging.

FOOD CONTAINERS

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

JARS

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, hospitality, retail, transport*

E-COMMERCE (THIS BAROMETER & REGULATION (EU) 2025/40)

Companies providing reusable packaging to businesses selling directly to consumers via online platforms or distance selling (online retailers, subscription box providers, marketplaces, direct-to-consumer brands). Linked to: E-commerce packaging (PPWR) – transport packaging used to deliver products sold online or through other means of distance sales to the end user.

HOSPITALITY (THIS BAROMETER, REGULATION (EU) 2025/40 & NEW ERA)

Companies providing reusable packaging to businesses offering food, drink, lodging, leisure or event-related services, serving consumers on-site or via takeaway/delivery. Linked to: **Take-away packaging (PPWR)** – service packaging filled at attended points of sale with beverages or ready-prepared food for transportation and immediate consumption, typically consumed from the packaging; **Hospitality packaging (New ERA)** – reusable packaging for hotels, restaurants (incl. takeaway/delivery), bars, events, canteens, theme parks and recreational facilities; and **HORECA sector (PPWR)** – Accommodation and Food Service Activities per NACE Rev. 2.

RETAIL (THIS BAROMETER & NEW ERA)

Companies providing reusable packaging to businesses selling packaged consumer goods directly to end users through physical points of sale (shops, supermarkets, pharmacies). Linked to: Retail packaging (New ERA) – reusable packaging for the sale of packaged goods (food, beverages, cosmetics, home and personal care products) to consumers at the point of sale.

TRANSPORT / INDUSTRIAL (THIS BAROMETER & REGULATION (EU) 2025/40)

Companies active in logistics, warehousing and distribution – handling, protecting and delivering goods in bulk or grouped formats across the supply chain, both B2B and B2C, excluding large transport containers (e.g. shipping containers). Linked to: **Transport packaging (PPWR)** – packaging conceived to facilitate the handling and transport of one or more sales units or a grouping of sales units, excluding road, rail, ship and air containers.



Wobz

ACTIVITIES AROUND REUSABLE PACKAGING - *Pooling, brand, cleaning, manufacturing...*

REUSE SYSTEM MANAGEMENT / POOLER (REGULATION (EU) 2025/40 & PACKAGING FROM NATURE)

The organisational, operational, technical or financial framework – including any necessary infrastructure and incentives – that facilitates and supports the reuse of packaging, in open-loop or closed-loop systems. **Pooling (Packaging from Nature)** is the sharing of use of a group of standard packaging items, unit load devices or handling assets, facilitated by a third party (the pooler) that owns, manages, tracks, recovers and maintains the pool. "Closed pooling" refers to an arrangement whereby an independent lessor acquires, funds and maintains a pool of reusable assets – which remain its property – and rents them to users.

BRAND / PRODUCER / RETAILER (REGULATION (EU) 2025/40 & DIRECTIVE 2008/98/EC)

The economic operator that places packaged products on the market and is responsible for the associated packaging, including compliance with Extended Producer Responsibility (EPR) obligations and participation in packaging prevention, reuse and end-of-life systems.

SOFTWARE MANAGEMENT (THIS BAROMETER)

Digital platforms and IT services enabling tracking, traceability, logistics coordination, and financial settlement of packaging flows across reuse and refill systems.

PACKAGING CLEANING & RECONDITIONING (REGULATION (EU) 2025/40, ANNEX VI)

Reconditioning (PPWR) – any operation listed in Annex VI, Part B necessary to restore the functional state of reusable packaging, including cleaning, inspection, repair and replacement of parts. **Packaging cleaning** refers to the industrial or commercial processes that restore reusable packaging to hygienic and functional standards so it can safely re-enter a reuse cycle.

PACKAGING & LABEL MANUFACTURING (REGULATION (EU) 2025/40)

Physical manufacturing of reusable packaging and identification elements (labels, traceability) – including packaging manufacturers as defined under the PPWR, and label manufacturers producing physical or digital identification elements attached to packaging.

MANUFACTURER OF COLLECTION SERVICES & INFRASTRUCTURE (THIS BAROMETER)

Operators that design, build and/or operate the physical and logistical infrastructure required for the collection, transport, return and aggregation of packaging in reuse systems.

CONSULTANT / ADVISOR / NGO (THIS BAROMETER)

Technical and strategic support provided to industry and public authorities for the implementation of reuse and refill systems.

TYPES OF REUSABLE PACKAGING SYSTEMS - *Closed loop, open loop, or without an operator*

CLOSED-LOOP SYSTEM (REGULATION (EU) 2025/40, ANNEX VI)

A reuse system in which reusable packaging is circulated by a system operator or a co-operating group of system participants, without the change of the ownership of packaging. The network is known and defined in advance, return flows are predictable, and loss rates are generally lower – the highest level of control among the three models.

OPEN-LOOP SYSTEM WITH SYSTEM OPERATOR (REGULATION (EU) 2025/40, ANNEX VI)

A reuse system in which reusable packaging circulates among an undefined number of participants, and ownership may change at one or more points in the process. A central operator (often a pooler) manages reverse logistics – collection, repair, cleaning, redistribution – at scale, without controlling a closed network of participants. This is the typical model for shared pooling systems.

OPEN-LOOP SYSTEM WITHOUT SYSTEM OPERATOR (THIS BAROMETER)

Also referred to as a "fungible open system", this model has no central operator. It relies on asset standardisation and an active secondary market: independent refurbishers collect, inspect, repair and reintroduce packaging into circulation without any single entity overseeing the whole system.

REFILL / BULK ACTIVITIES - *The activities bulk (packaging-free) operators report in Figure 15*

SALES OUTLET (REGULATION (EU) 2025/40)

The point at which the product reaches the person who consumes it. The PPWR calls this actor the final distributor: the natural or legal person in the supply chain that delivers packaged products, including through reuse, or products that can be purchased through refill, to the end user. In bulk retail this is the shop where the customer fills their own container, and the obligation to operate refill stations falls on this actor.

E-COMMERCE (REGULATION (EU) 2025/40)

Selling to the end user at a distance rather than across a counter. The PPWR treats e-commerce as a sales channel and not a packaging category of its own: what it defines is e-commerce packaging, the transport packaging used to deliver a product bought online or through other distance sales. For a bulk operator, this is the hardest role to fill without packaging, since the container has to travel.

TRANSFORMER (REGULATION (EC) NO 852/2004)

An operator that processes raw products into the goods sold in bulk. EU food-hygiene law defines processing as any action that substantially alters the initial product – including heating, smoking, curing, maturing, drying, marinating, extraction or extrusion, or any combination of these. The survey option carries the spelling "Transfomer"; it is displayed corrected throughout this report.

PRODUCER / FARMER (REGULATION (EC) NO 178/2002)

An operator at the start of the chain, in what EU food law calls primary production: the production, rearing or growing of primary products, including harvesting, milking and farmed-animal production prior to slaughter, as well as hunting, fishing and the harvesting of wild products. In bulk this is typically a producer selling directly, without an intermediary.

WHOLESALERS EUROSTAT, NACE REV. 2

Resale of goods without transformation to retailers, to industrial, commercial, institutional or professional users, or to other wholesalers (NACE Division 46). A wholesaler serving bulk retail supplies the shop rather than the shopper, and is where reusable business-to-business packaging either replaces single-use packaging or does not.

DISTRIBUTORS (REGULATION (EU) 2025/40)

Any natural or legal person in the supply chain, other than the producer or the importer, who makes packaging or packaged products available to resellers or end users. In practice the logistics role between the producer and the shop: moving goods, and in a bulk system also moving the empty containers back.

EQUIPMENT / TECHNOLOGY SUPPLIER (THIS BAROMETER)

A company that does not sell the product but supplies what makes selling it in bulk possible: gravity dispensers and silos, weighing and tare systems, deposit and return hardware, washing equipment, or the software that tracks containers. No harmonised European definition exists for this role; it is a survey category.

CONSULTANT / ADVISOR / NGO / NETWORK / PRO
(REGULATION (EU) 2025/40, DIRECTIVE 2008/98/EC)

Organisations that support the sector without trading in it: advisers, non-governmental organisations and sector networks, together with producer responsibility organisations – the entities that organise, financially or financially and operationally, the fulfilment of extended producer responsibility obligations on behalf of several producers. In Belgium the relevant PROs are Fost Plus for household packaging and Valipac for industrial and commercial packaging.

BULK SALES (ZERO WASTE EUROPE; FRENCH LAW NO. 2020-105)

The term "bulk sales" does not yet have a harmonised legal definition at European level. Zero Waste Europe notes that it generally refers to "goods sold without being pre-packaged (except for traditional 'over the counter' businesses: delicatessen, caterer, bakery, fishmonger's[62], etc.) via self-service" and "is not subject to any legal definition in European legislation". France has provided a national legal definition in Law No. 2020-105 of 10 February 2020, under which bulk sales may be offered in self-service or assisted formats – including via distance selling – with consumers responsible for the cleanliness and suitability of the reusable container used.



Aucxis

LIST OF INDICATORS

The following indicators are monitored across the survey's six indicator groups listed below. The full question-by-question inventory, including Airtable field mappings, is maintained separately in the survey specification.

1. COMPANY CHARACTERISATION & PACKAGING USED

- Headquarters and countries of activity
- Year of creation and year the company became active in reuse / bulk
- Sector of activity (free text, coded; e.g. Retail/FMCG, Hospitality, E-commerce, Transport & Logistics) and PPWR reuse category
- Type of activity provided around reusable packaging (Design, Producer/Retailer, Manufacturer, Cleaning/Reconditioning, Traceability, etc.)
- Social Readiness Level (SRL), from Concept to In Market
- Number of full-time equivalent (FTE) employees working on reusable packaging, and planned recruitments over the next two years
- Type of reusable packaging used (beverage bottles, crates, cups, etc.) and main materials (glass, plastic, metal, cardboard, etc.)
- Price of reusable packaging and of the product sold in it, compared to single-use equivalents
- Packaging compliance with a standardisation design
- Technologies used to track reusable packaging (QR codes, RFID, barcodes, manual systems, etc.)



Packback

2. ECONOMIC & FINANCIAL INDICATORS

- Annual turnover in 2025, 2024 and 2023, and % of revenue linked to reusable packaging
- Operational profitability of the company's core reusable packaging activity
- Expected timeline to reach profitability from reuse activities, where applicable
- Funding stage (Pre-seed, Seed, Series A/B/C+, Other) and type of investment received
- Capital expenditure (CAPEX) invested at the launch of reuse operations
- Yearly total capital raised or planned to raise, 2020–2029

3. INDUSTRY MATURITY & 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 cleaning / reconditioning centres compared to maximum capacity
- Average number of cycles per packaging format and material
- Perceived maturity of the reusable packaging industry, nationally and per sector of activity
- Main barriers to scaling reusable packaging solutions
- Initiatives or incentives to encourage consumer adoption and consistent return of packaging
- Type of support that would most benefit companies (financial, regulatory, technological, etc.)

4. REGULATORY & INSTITUTIONAL CONTEXT

- Perceived level of support from the national regulatory environment for the reusable packaging industry
- Perceived level of support from the EU Packaging and Packaging Waste Regulation (PPWR)
- Most beneficial type of support required (financial support, stronger regulations, etc.)

5. OPERATIONAL & SYSTEMIC LEVERS

- Existence of collaboration with other stakeholders (competitors, logistics providers, cleaning services, policymakers) to develop shared reusable packaging infrastructure or standardised solutions
- Expected development of reusable packaging in the sector over the next five years
- Trends or innovations anticipated to shape the future of reusable packaging in the sector

6. REFILL / BULK (PACKAGING-FREE) INDICATORS

- Type of refill / bulk activity provided (sales outlet, producer or farmer, e-commerce, wholesaler, distributor, transformer, equipment or technology supplier, consultant)
- Number of product references offered in bulk (packaging-free) format
- Share of the assortment offered in bulk, and the split between food and non-food products
- Share of bulk references of local origin, and average distance from production to distribution point
- Losses due to spillage, hygiene issues or expiry
- Availability of empty reusable containers for customers, with or without a deposit, and who cleans them
- Average return rate of reusable containers at the point of sale
- Share of revenue coming from products sold in bulk, and how that share is evolving
- Main obstacles encountered when implementing bulk products, with an open-text elaboration

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