EXECUTIVE SUMMARY

Belgian Bulk and Reuse Barometer 2026: the market is ready to scale up

Belgium is Europe's recycling champion. With a recycling rate of 79.3%, our country is well above the European average of 67.4% (Eurostat, 2023). When it comes to prevention, though, things are not going so smoothly: the volume of packaging on the market has remained virtually stable in recent years*.

The PPWR, however, marks a turning point. The European Packaging and Packaging Waste Regulation came into force on 12 August 2026, meaning that reuse and refill sales are no longer voluntary initiatives, but are now mandatory. Member states must reduce their packaging waste by 5% by 2030, 10% by 2035 and 15% by 2040, in each case compared with 2018. In addition, there will be obligations regarding refills at takeaways and supermarkets, as well as reuse quotas, which will increase from 2030 onwards for, among other things, transport packaging, drinks packaging and the hospitality sector.

The sector is ready

The Belgian Bulk and Reuse Barometer 2026 surveyed 48 companies and paints a clear picture: the infrastructure and technology are in place. No fewer than 84% of companies active in reuse are operational or in the scaling-up phase (social readiness level 8-9). However, all that potential is being seriously underutilised. Scale, standardisation and genuine consumer acceptance are still lacking.

The key insight from this edition is that bulk and reuse have become increasingly intertwined – and that is exactly what is needed in order to scale up. Bulk involves consumers directly in waste prevention, while reuse shapes the logistics. The value chain for bulk products will only truly be free of single-use packaging once reuse is implemented by both suppliers and consumers.

Infrastructure isn't a problem either. There is currently underutilisation at industrial cleaning partners. Of the six Belgian cleaning operators who replied, half are operating at around 50% of their maximum capacity; two are even below 10%. In other words, the existing capacity is waiting for volume. It is therefore not necessary for every player to reinvent the wheel or set up their own pilot project, but rather to participate in shared, standardised networks.

Deposit and rotation determine whether the system works

Goodwill and communication alone are not enough to achieve high return rates; a deposit scheme is. The figures also point in that direction: the proportion of bulk suppliers using a deposit scheme for reusable packaging rose from 24% to 45% in the space of one year. For schemes with a post-paid deposit (where the consumer only pays if they do not return the packaging) or a hybrid model, the return rate is over 90%. Systems with a prepaid deposit are performing reasonably well, while systems without a deposit remain below 50% in half of the cases. This applies to both reusable and refillable packaging and is consistent with the decades-long success of the Belgian deposit scheme for beer bottles. In practice, behavioural change is driven by financial incentives.

Another consideration is the number of rotations, as this is a key factor in the business case. A reusable cardboard box that is used on average just 1.4 times is, in practice, single-use packaging. The tipping point is likely to be with harder materials such as plastic and glass, which can rotate tens to hundreds of times. Here too, the PPWR will provide clarity.

Three categories, three challenges

We see different emphases in each category.

- With transport packaging, the exemption for cardboard stands out: for transport within a company and between companies within a single member state, there is both a 100% reuse requirement and a reuse target of 10% for grouped packaging. However, there is an exemption for paper and cardboard, which 42% of the Belgian reuse innovators surveyed would most like to see abolished (compared with 36% in Europe).

- In the case of drinks, the target is almost entirely met by the existing system. Virtually all reusable household packaging (by weight) consists of glass drinks packaging. That legacy system is serving Belgium well, but there is a great deal of uncertainty among consumers. The study therefore calls for clearer information about the product itself and about the locations where bottles can be returned.

- In the hospitality sector and for takeaways, the main obstacle is not the technology, but the cost. And behind the cost lies volume. A reusable item only becomes cheaper than a disposable one after it has been used sufficiently and once the system is scalable. Systems that have not yet reached the required volume are therefore unable to match the price of disposable packaging for the time being, however well they may work. Technically speaking, the sector will be ready by February 2028, when every takeaway outlet – with the exception of micro-enterprises – will be required to offer its customers a reusable option. But the way in which that option is presented is at least as important, because the system works best when reusable packaging is the only option, sending the customer a single, clear message.

No opposition, but a visibility issue for EPR

One striking point is the perception surrounding extended producer responsibility (EPR). Twenty-seven per cent of Belgian respondents from the reuse and bulk sectors state that they do not have a clear enough understanding of what EPR systems do in terms of reuse. That is twice the European average of 13%, which is remarkable in a country with one of the oldest and most developed EPR systems in Europe. At the same time, only 5% view EPR negatively or see no added value in it, compared with 11% in Europe.

The sector is therefore not opposed to EPR, but is all too often unaware of what is possible in this area. However, EPR has a role to play here, as reuse and bulk operators each face their own, albeit related, obstacle. In the case of reuse, this is the price difference compared with single-use that respondents want to see tackled through regulation. In the case of refill systems, it is consumer habits and a lack of awareness, which can be addressed through public information campaigns. In both cases, EPR can help.

The gap between consumer willingness and behaviour

The demand for support from the sector has shifted significantly compared with last year. In 2025, consumer education and awareness-raising (24%), collaboration (22%) and regulations to limit single-use items (20%) were the top priorities. In 2026, legislation stimulating reuse – and its enforcement – is by far the most common request (88%), followed by financial support (59%) and consumer education (56%).

On the consumer side, there is certainly no lack of goodwill. Around 8 out of 10 Belgians think there is too much packaging. The problem is not a lack of willingness, but rather access or habit, as only 5 out of 10 Belgians are actually buying products with less packaging (Fost Plus Environmental Barometer 2024). The problem, in other words, does not lie in a lack of willingness, but rather in habit and access to a market that remains highly fragmented. We will therefore have to make the transition from individual, well-intentioned but isolated actions to a collective, industry-wide standard.

Belgium has two parallel circular economies. The first is the existing – historical – system for beer bottles, crates and pallets. This is stable and scalable, but not very innovative. The second is new and still fragmented, and applies the same principles of deposits, pooling, washing infrastructure and standardisation to new sectors (takeaways, retail and e-commerce). It is this second segment that will determine whether Belgium will meet the PPWR's reuse targets as well as its recycling targets.

RE-VRAC Belgium, the Belgian Bulk and Reuse Barometer produced by ConsomAction and Fost Plus, is the result of a survey of Belgian companies operating in the bulk and reuse sectors. This second edition is based on the data from the Belgian respondents in the European Reuse Barometer 2026: 59 of the 130 respondents operate in Belgium, 11 of which are in the pan-European transport sector. Of the remaining 48 companies, 33 operate in the reuse sector, 17 in the bulk sector and 2 in both. The survey offers a glimpse behind the scenes at the companies driving the sector's development, rather than at the market as a whole. The annual activity reports of Fost Plus and Valipac set out the volume of reusable packaging entering the market (in relation to their respective members).

https://www.reusebarometer.eu/

*Single-use household packaging reported by Fost Plus members
2021 806 kT
2022 761 kT
2023 735 kT
2024 728 kT
2025 731 kT