

Update on Deposit Return Systems

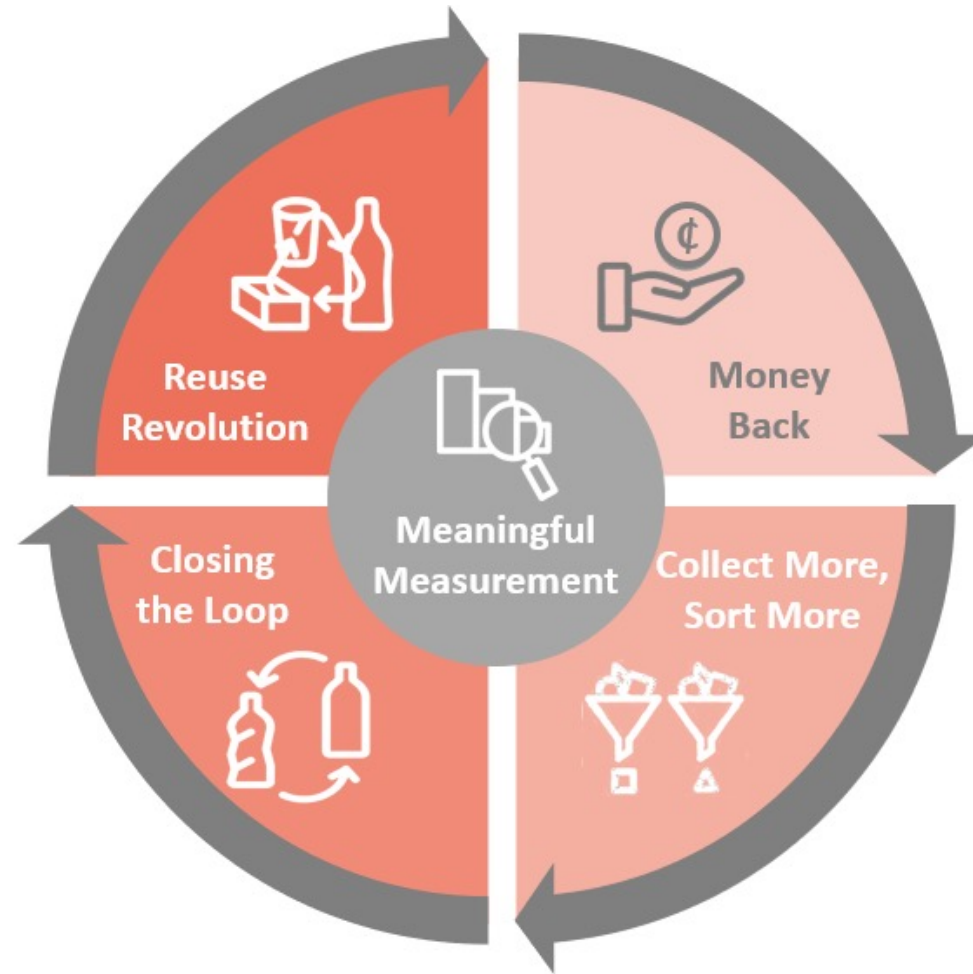
Clarissa Morawski
June 15, 2022

reloop
resources remain resources



About Reloop

Reloop is an international non-profit organization that brings together industry, government and NGOs who share a vision of a system where resources are kept in continuous use and waste and pollution are eliminated.



GLOBAL DEPOSIT BOOK 2020



www.reloopplatform.org/wp-content/uploads/2020/12/2020-Global-Deposit-Book-WEB-version-1DEC2020.pdf



What We Waste Dashboard

[Explore What We Waste dashboard](#)

The dashboard is the second part to our What We Waste report, published in April



What We Buy

Produced by Reloop Platform using data from GlobalData PLC

SUB REGION

Northern Europe

COUNTRY

All

BEVERAGE CATEGORY SELECTOR

Beer & Cider

Carbonates

Energy & Sport

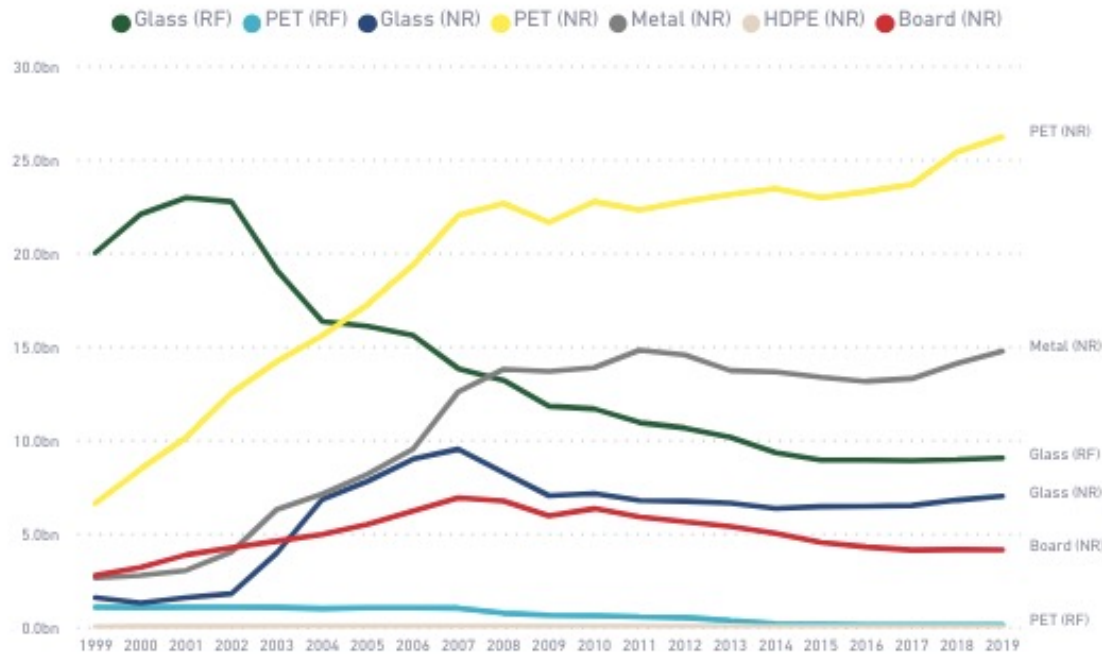
Iced Tea & Coffee

Juices

Waters



Sales - Northern Europe -



Sub Region Overview

Northern Europe

In the North-East European region, the Refillable Glass bottle was the most common way to sell beverages in 1999. Combined with the Refillable PET bottle, these made up 63% of total beverage sales in the region. NR PET sales were increasing year-over-year while Refillable sales increased at first, then fell quickly. By 2006, NR PET had taken over as the most popular beverage container in the region. Refillable market share continued to fall as sales increased for NR PET, Metal cans, NR Glass and Board. In 2008, Metal can sales surpassed the Refillable bottle for second highest market share. By 2019, NR PET had established itself as market leader, Metal cans had increased their market share lead over refillable glass bottles, which by then had lost huge market share to drop to 15% of beverage sold in the region.

Sub Region Category Overview

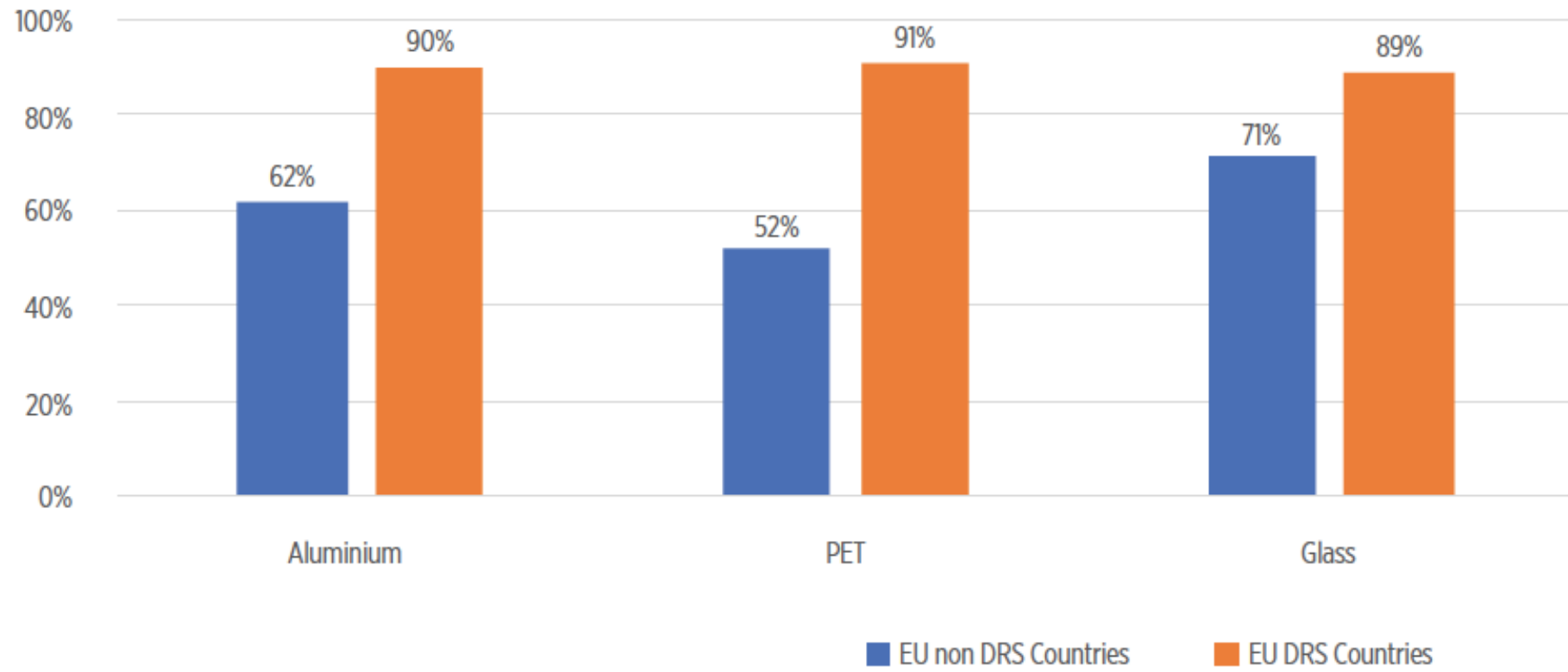
Northern Europe - Beer & Cider

In 1999, the vast majority (86%) of beer sold in this part of the world was sold in Refillable containers. NR Glass and Metal cans were both gaining sales quickly though, and had taken significant share away from Refillables already when a surge in Can sales from 2006-2008 vaulted the can ahead of the Refillable for top market position. NR Glass sales fell off a bit, and the refillable mostly kept pace with the Metal can, because the can saw sales fall somewhat between 2012-2016. After 2015, the NR Glass started gaining sales again, followed by the Metal can in 2017. During this time the Refillable fell off a bit, losing more market share. By 2019, Refillable market share was down to 29%.

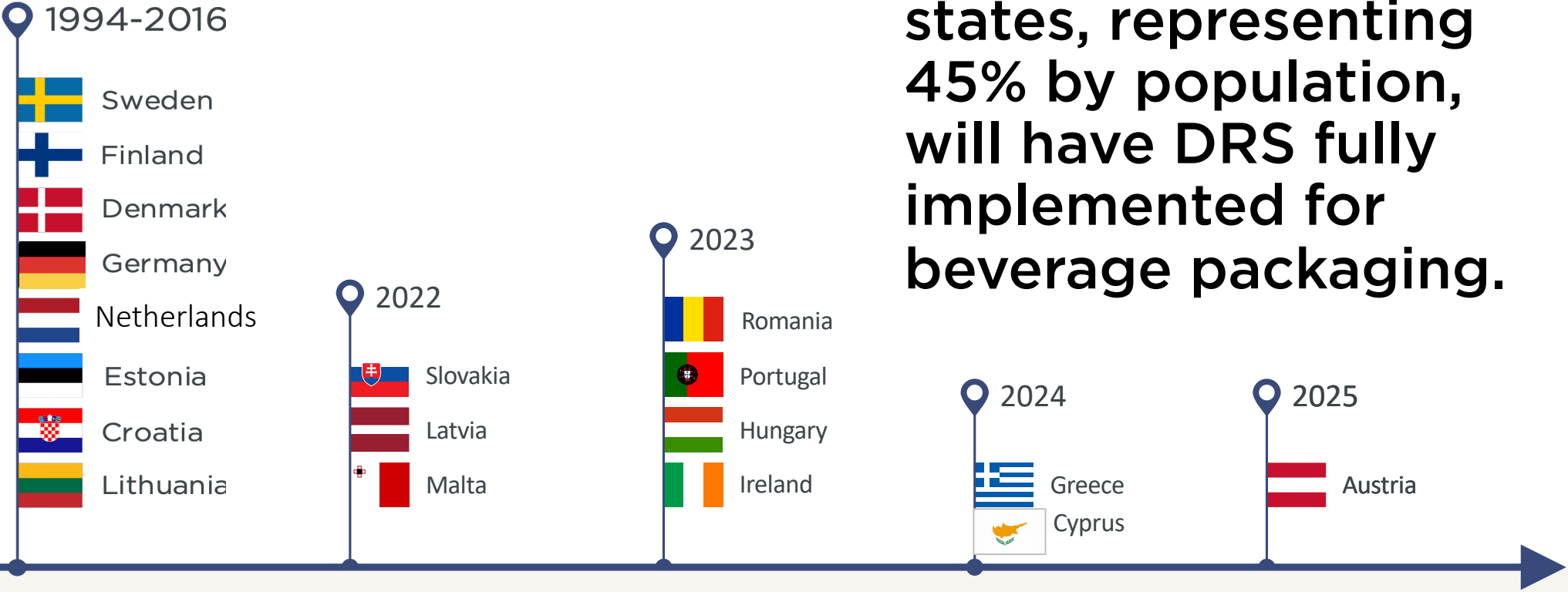
Northern Europe - Carbonates

The majority of carbonate sales in this region had already been moved into NR PET by 1999. Refillable Glass held the second highest market share, and Refillable PET, popular in several of these countries, also had a presence. Together, the Refillables were 47% of all carbonates sales. Over the two decades of data, the NR PET gained most of the early sales to take the highest market share, which it held the length of the study. Both types of Refillables slowly fell off, while Metal cans saw increased sales, passing R PET in 2005 and R glass in 2007. NR Glass also

Average recycling rates by material, EU DRS vs Non-DRS countries



Member States are on their way



By the end of 2025, at least 20 member states, representing 45% by population, will have DRS fully implemented for beverage packaging.

...and other member states are close...



By the end of 2026, it is likely that 25 member states will have a DRS implemented, representing over 80% of EU citizens.

Products in the deposit systems

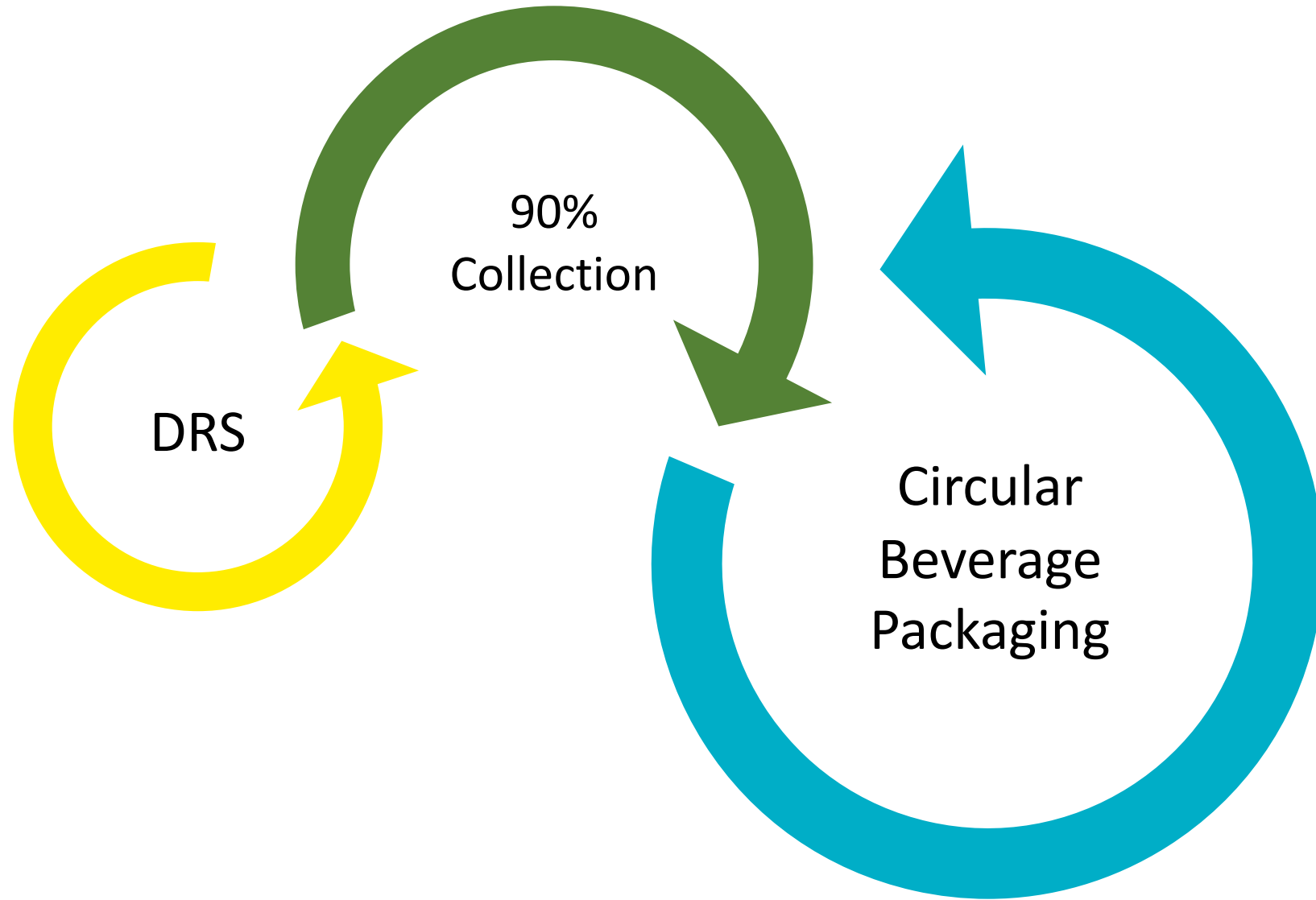



	Croatia	Denmark	Estonia	Finland	Germany	Iceland	Lithuania	Netherlands	Norway	Sweden	Latvia	Slovakia	Malta
Water (still, sparkling)	•	•	•	•	•	•	•	•	•	•	•	•	•
Soft drinks	•	•	•	•	•	•	•	•	•	•	•	•	•
Juices and nectars	•		•	•	•	•	•	•	•		•	•	•
Beer	•	•	•	•	•	•	•	•	•	•	•	•	•
Cider	•	•	•	•	•	•	•	•	•	•	•	•	•
Alcohol beverages	•	<10%	<6%	•	•	•	•		•	•	<6%	•	<10%
Wines	•			•		•	in PET		•			•	
Liquors	•			•		•			•				
Spirits				•									
Milk	<0,2l				•			•					

Packaging types in the existing European DRS systems



Country	Plastic	Metal	Glass
Croatia	•	•	•
Denmark	•	•	•
Estonia	•	•	•
Finland	•	•	•
Germany	•	•	•
Iceland	•	•	•
Lithuania	•	•	•
Netherlands	•	•	×
Norway	•	•	×
Sweden	•	•	×
Latvia	•	•	•
Slovakia	•	•	×
Malta	•	•	•



connecting waste to climate change





waste

reloop

Target 90: The dual-action approach for circular drinks packaging in Europe

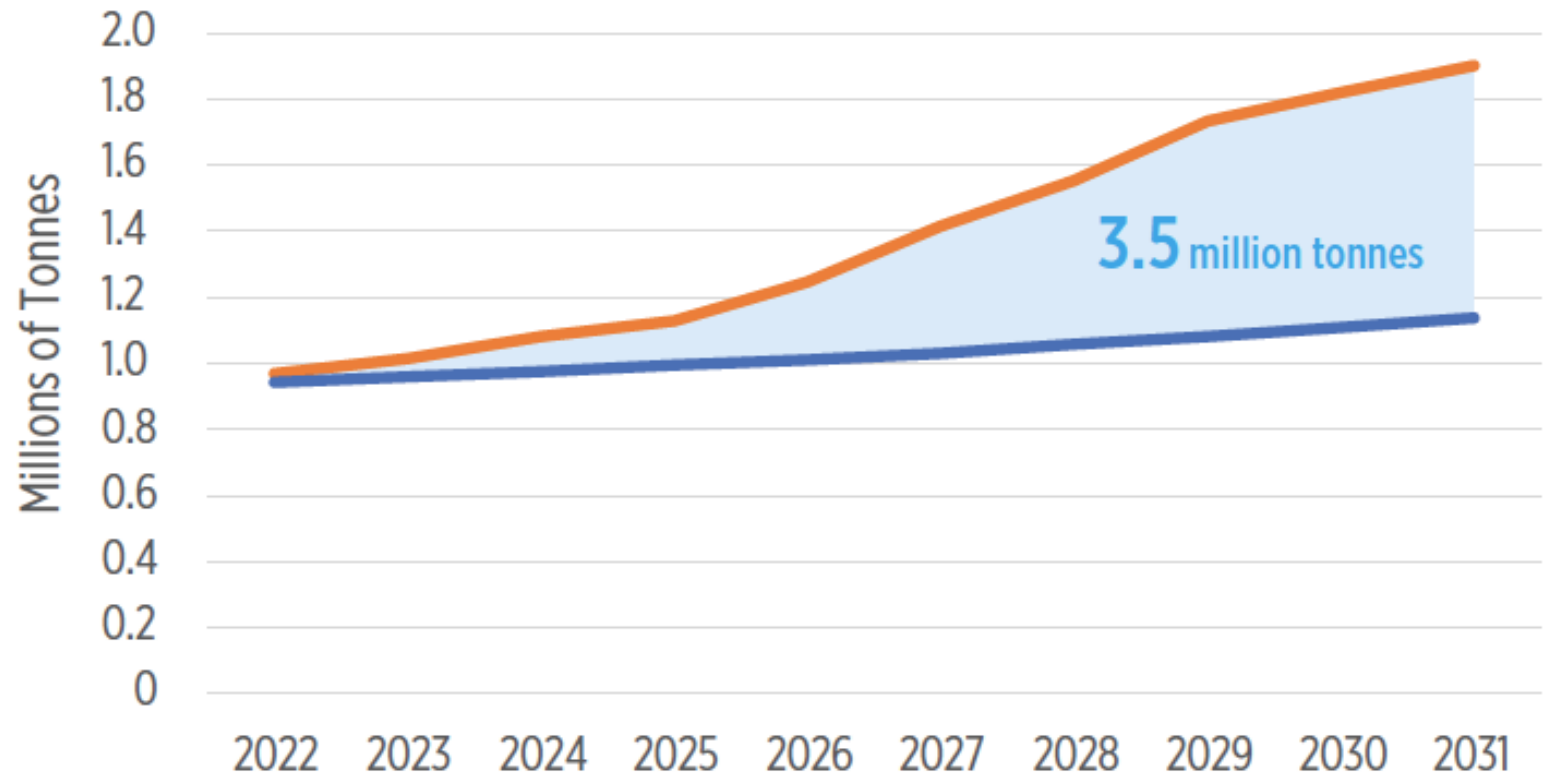
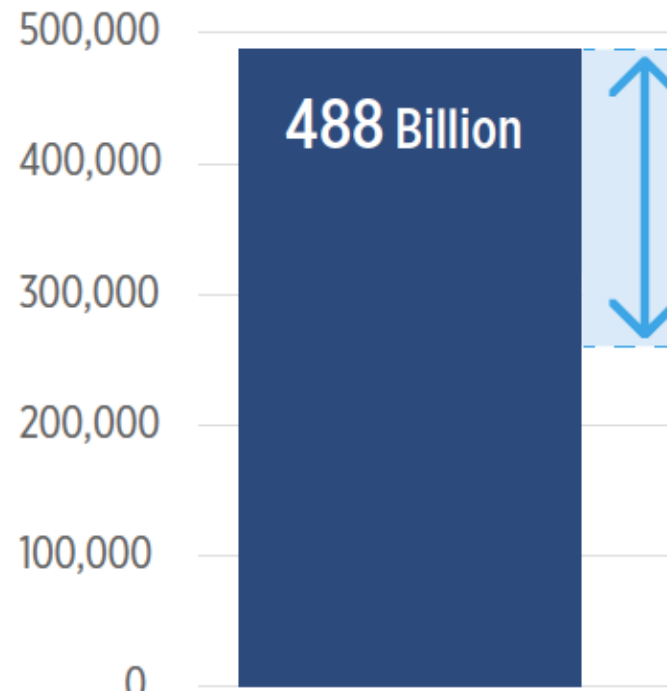


Cumulative Total Containers Wasted (Billions)

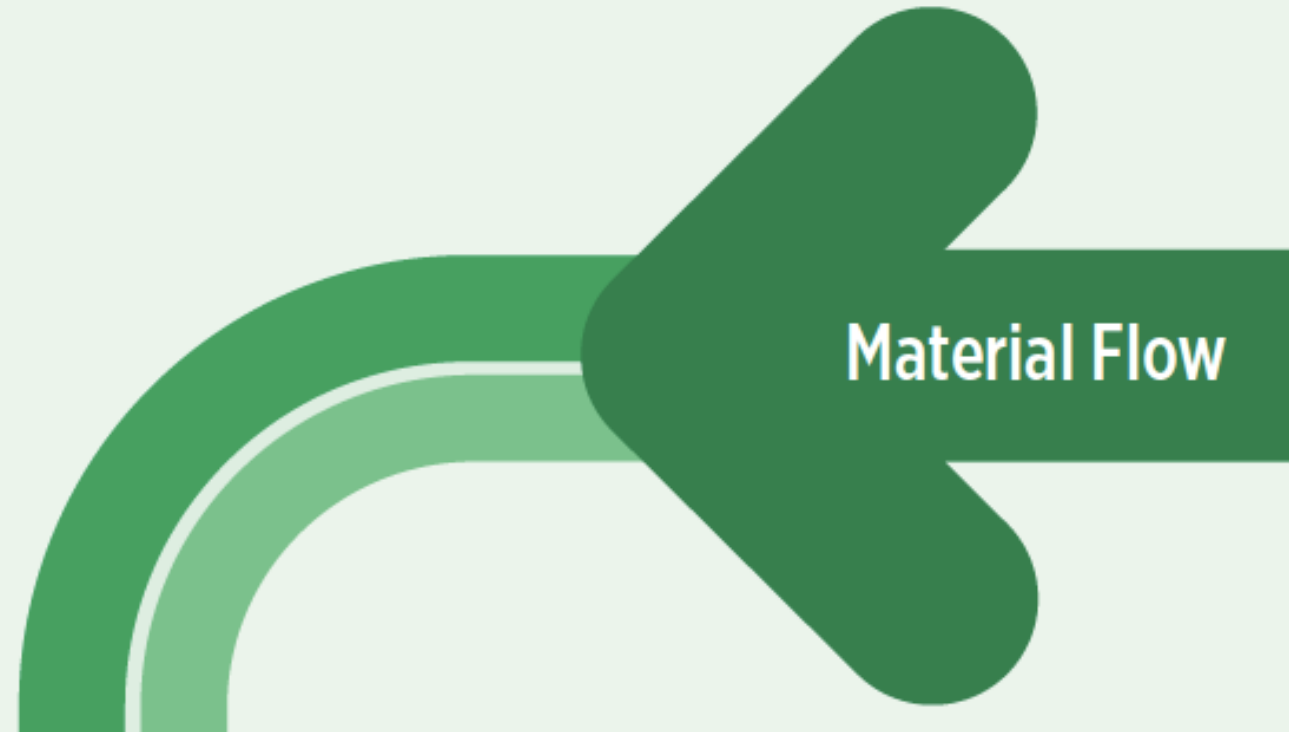
2022-2031 EU27 - Status Quo vs Target 90%

Figure 5: Tonnes PET Recovered

2022-2031 EU27 - Status Quo vs Target 90%



A closer look at circularity & material flow





Material Flow for PET under the status quo scenario (EU)

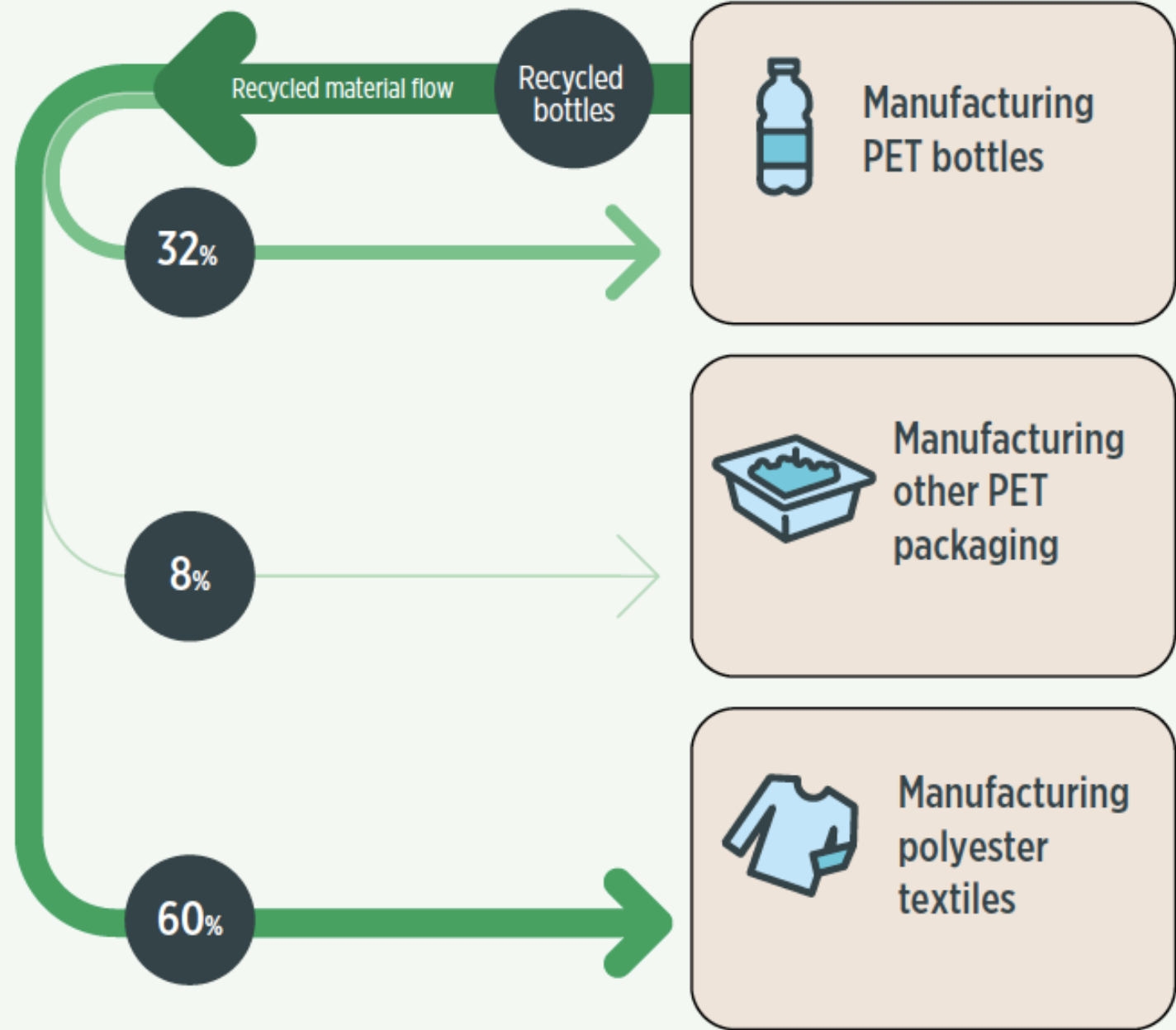


Figure 9: Material flow analysis for PET under the status quo scenario using 100 units input

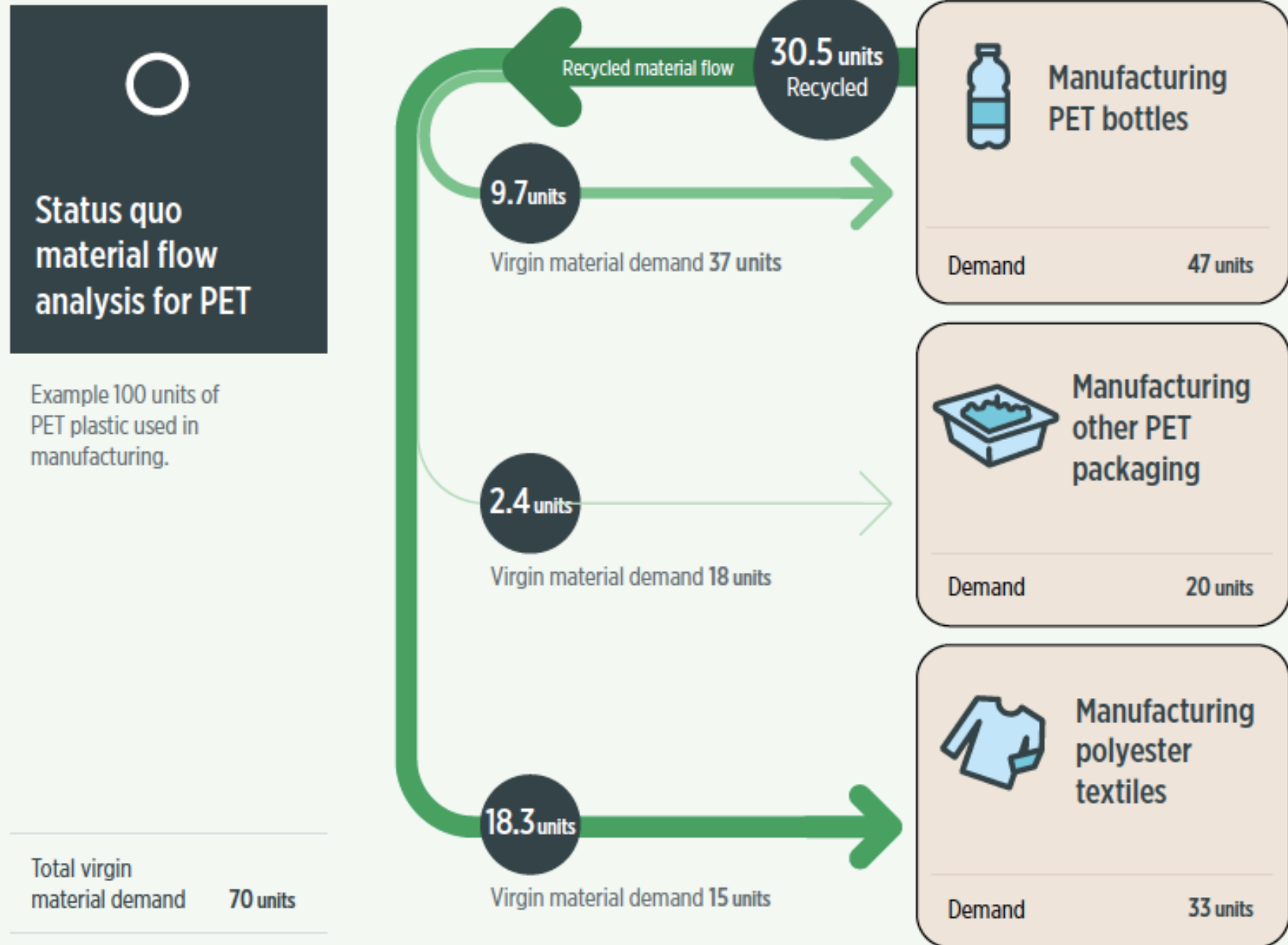


Figure 11: Increased circularity model material flow

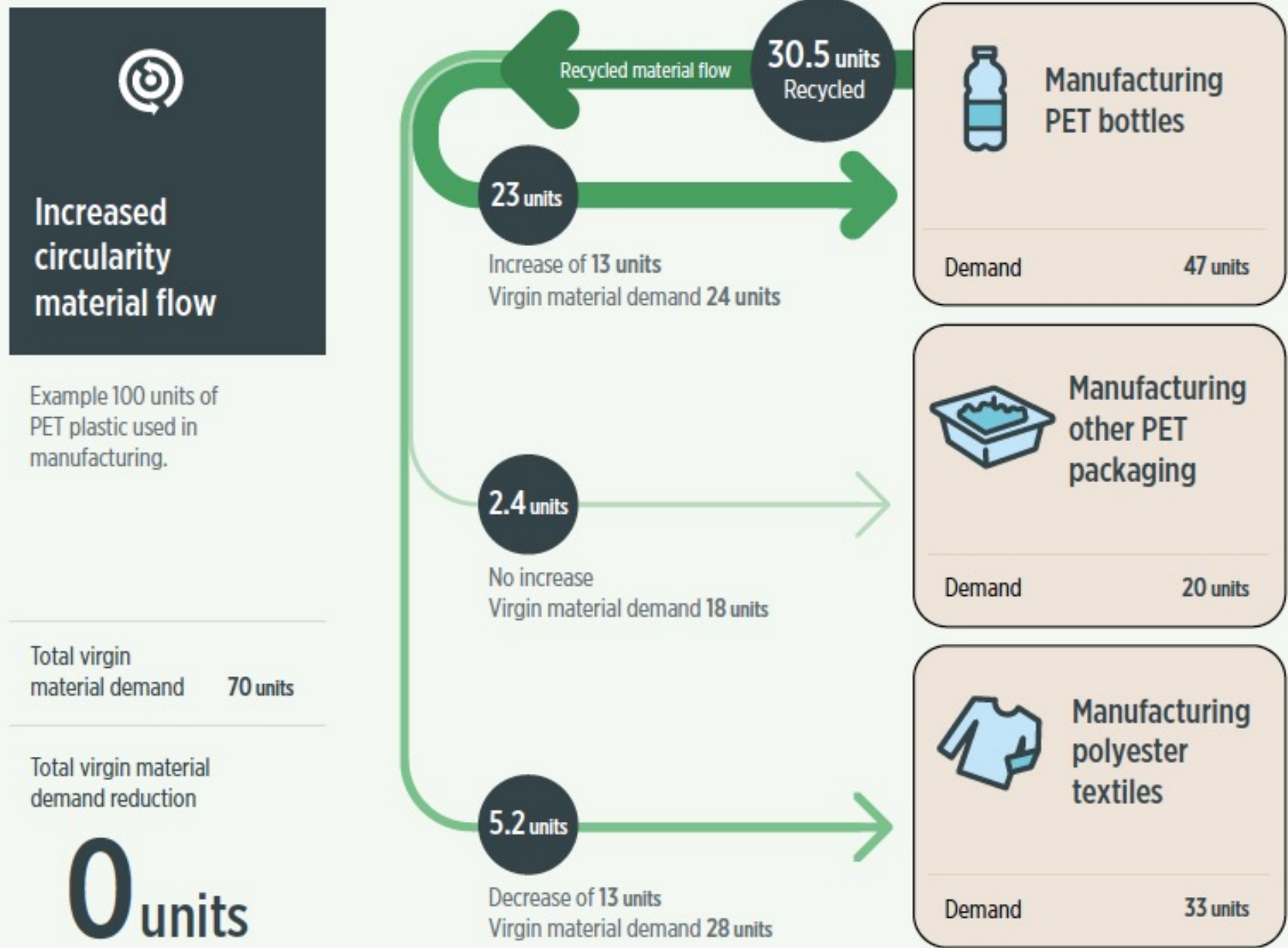


Figure 12 Increased recycling rates model material flow

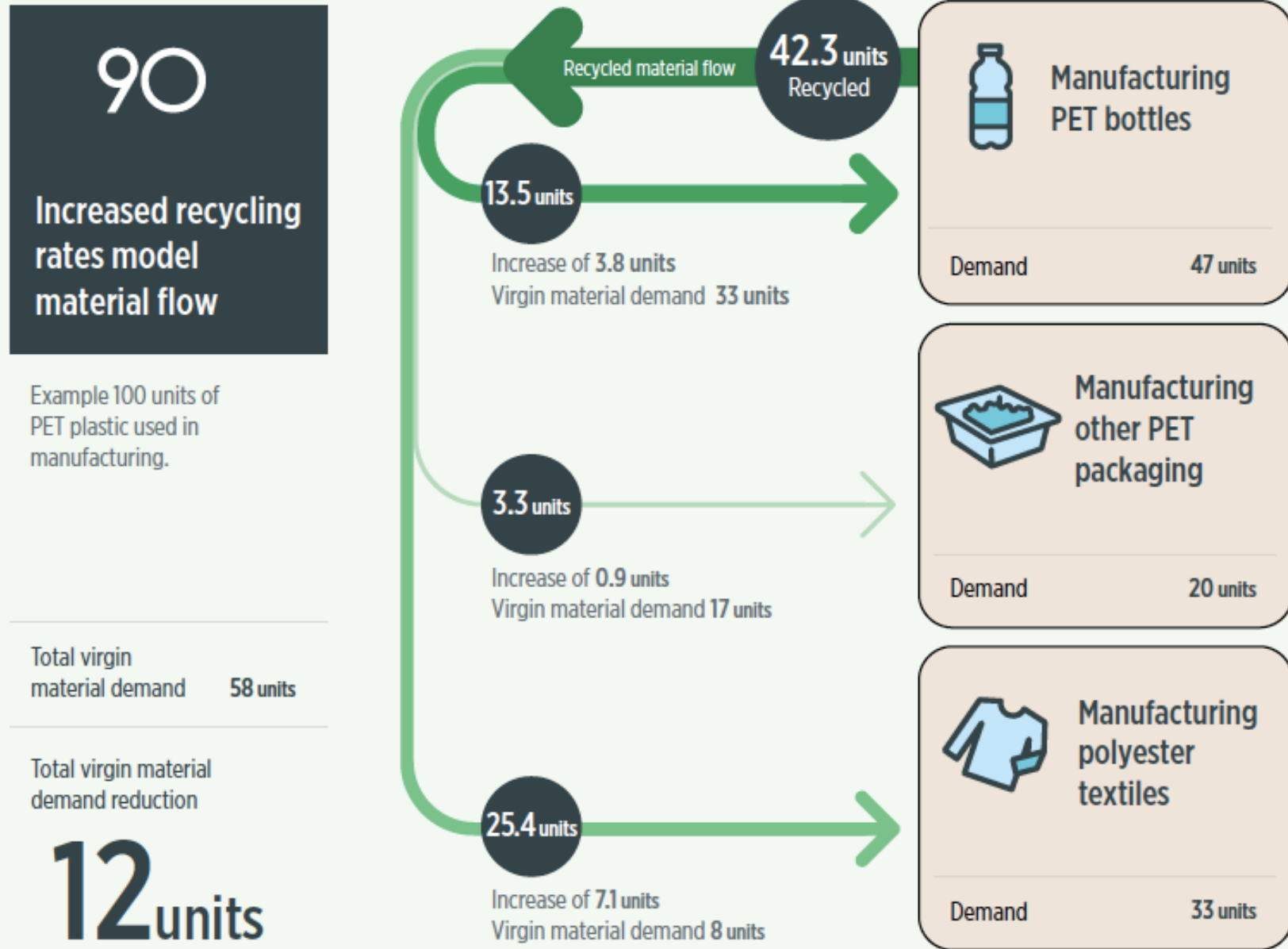
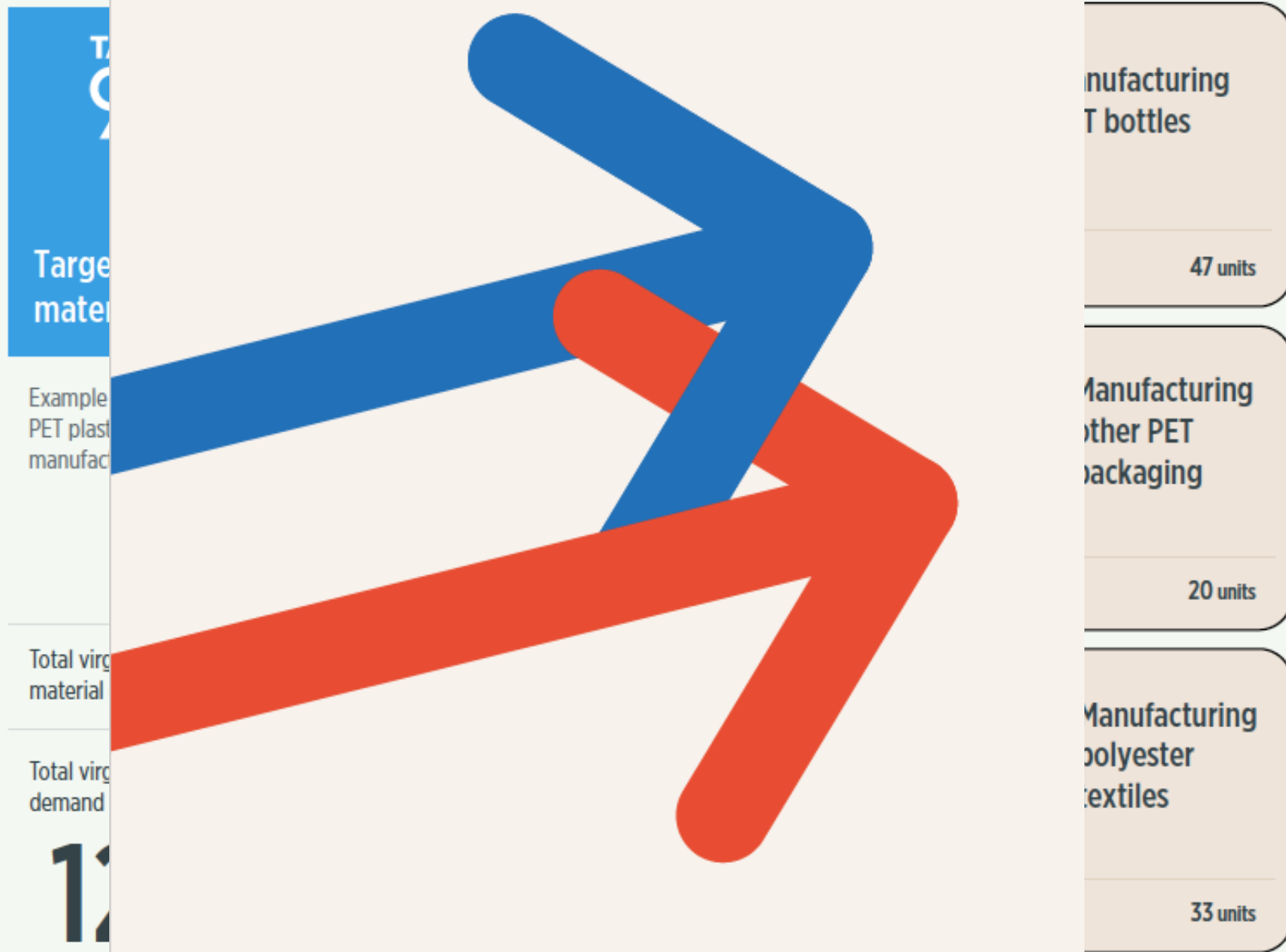


Figure 13 T



Total EU - Status quo vs Target 90 - Ktonnes of rPET available from bottles

1.400.000

1.200.000

1.000.000

800.000

600.000

400.000

200.000

-

2022

2023

2024

2025

2026

2027

2028

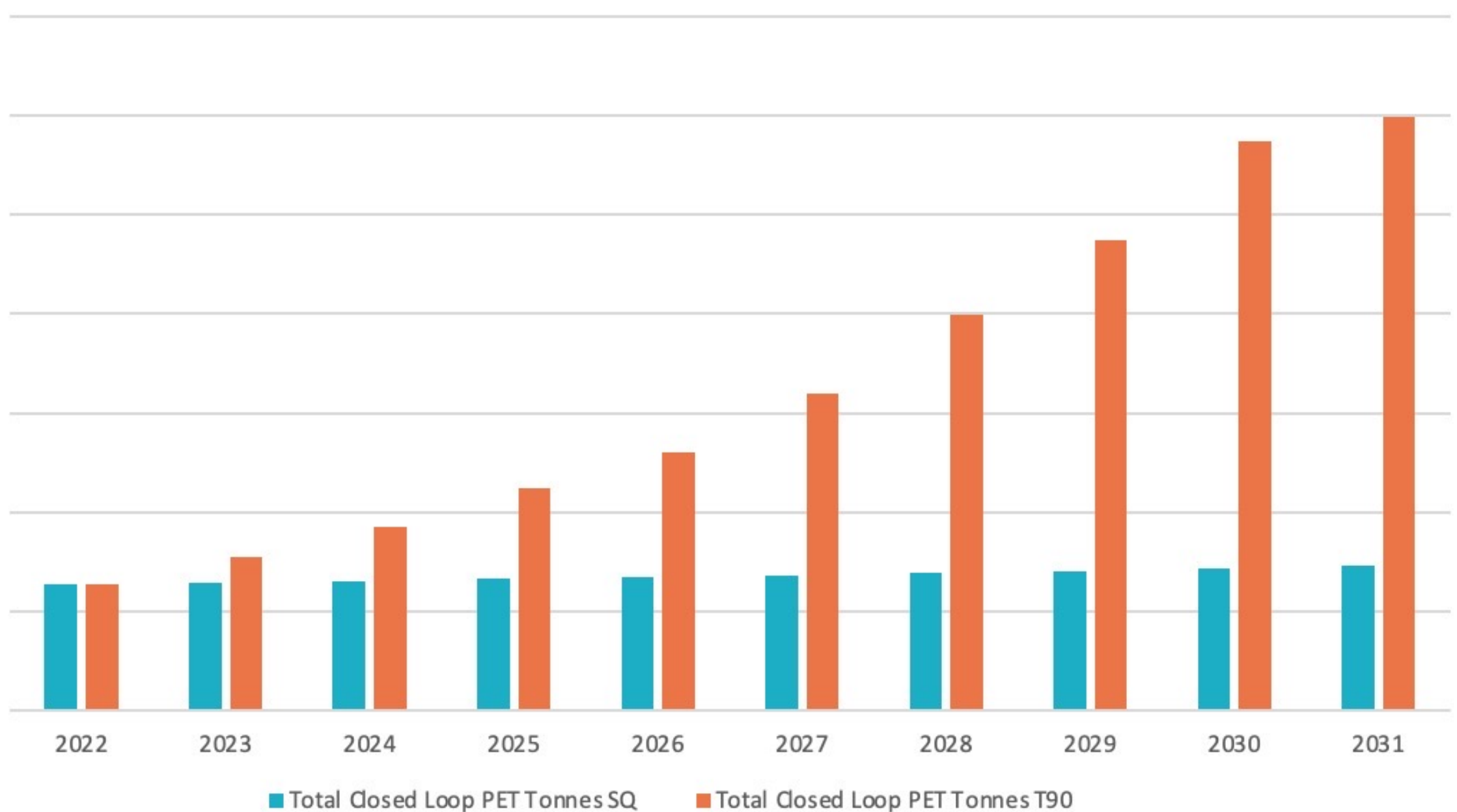
2029

2030

2031

■ Total Closed Loop PET Tonnes SQ

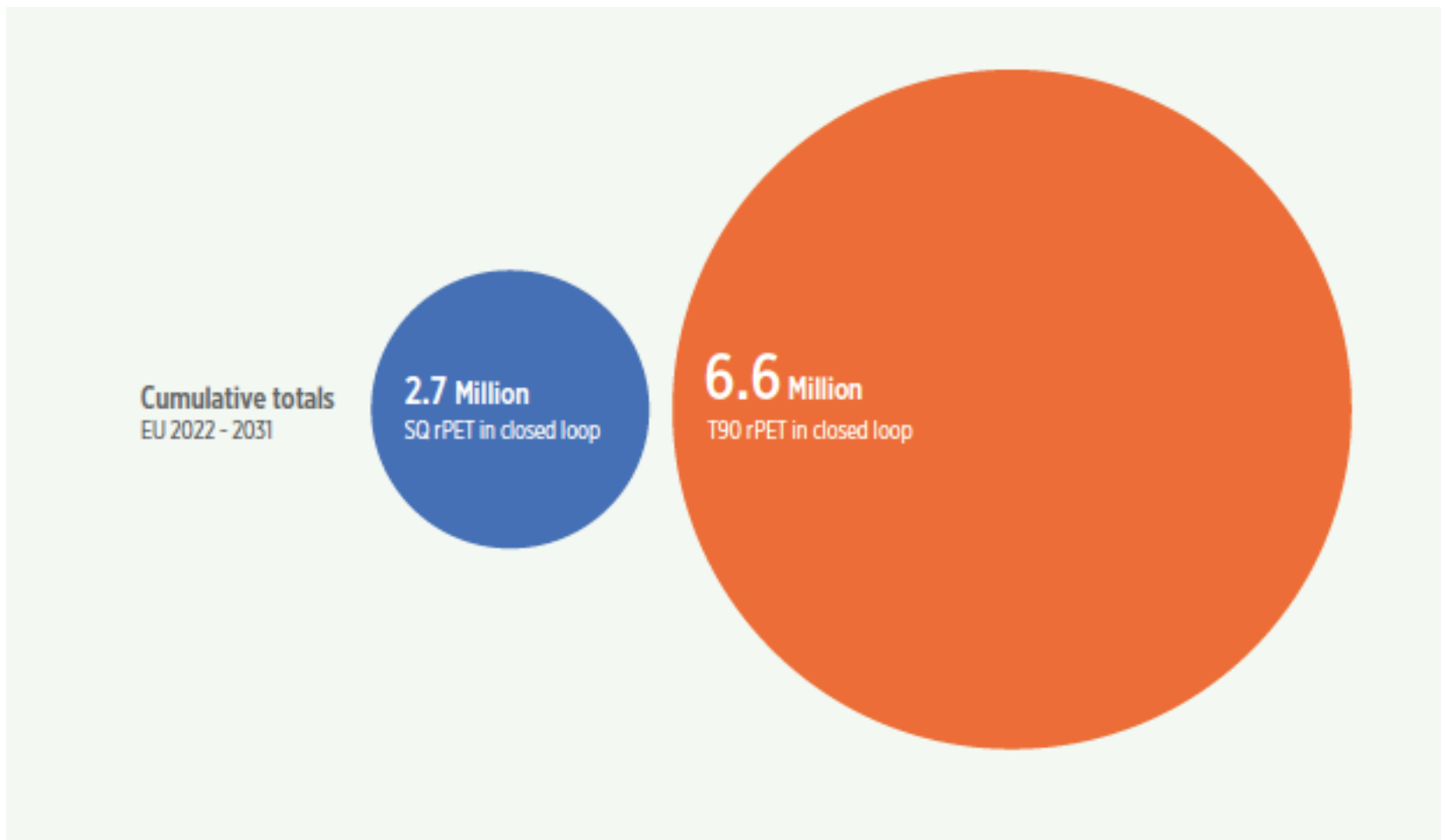
■ Total Closed Loop PET Tonnes T90



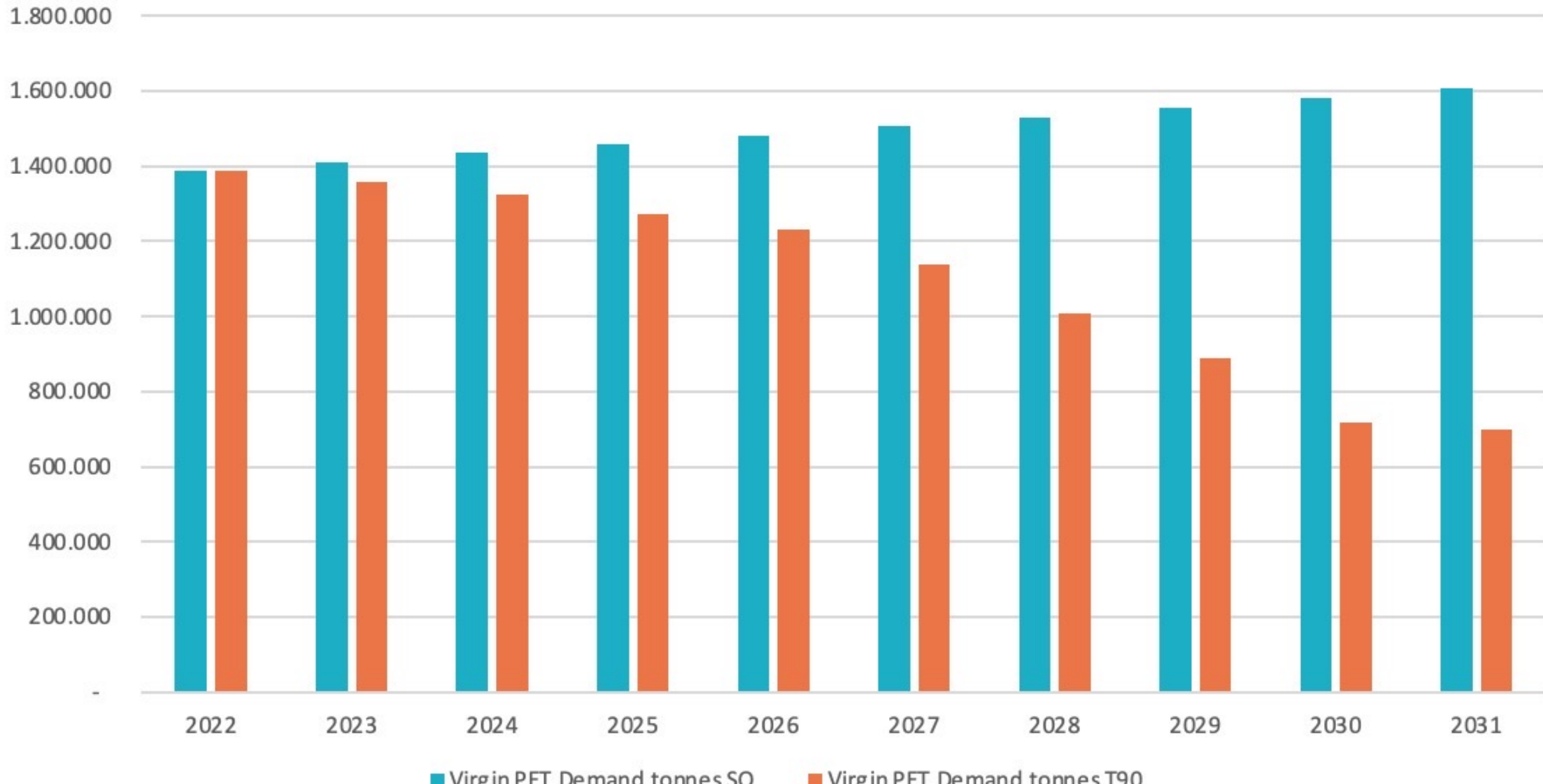
Cumulative totals
EU 2022 - 2031

2.7 Million
SQ rPET in closed loop

6.6 Million
T90 rPET in closed loop



Total EU - Status quo vs Target 90 - KTonnes of virgin PET demand



Total EU - Status quo vs Target 90 - Plastic source to meet bottle demand - 2031

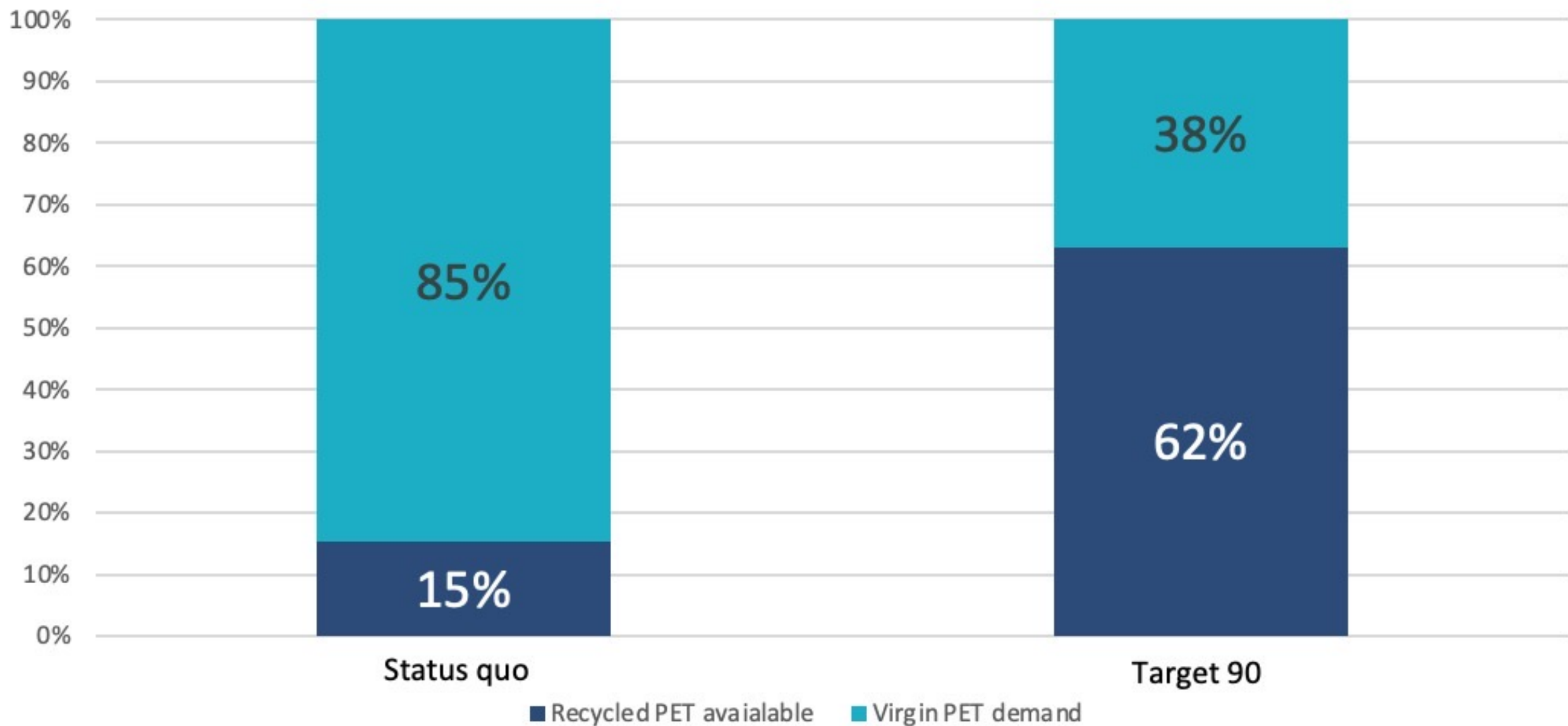


Figure 17: Changes In Virgin PET demand if circularity is increased

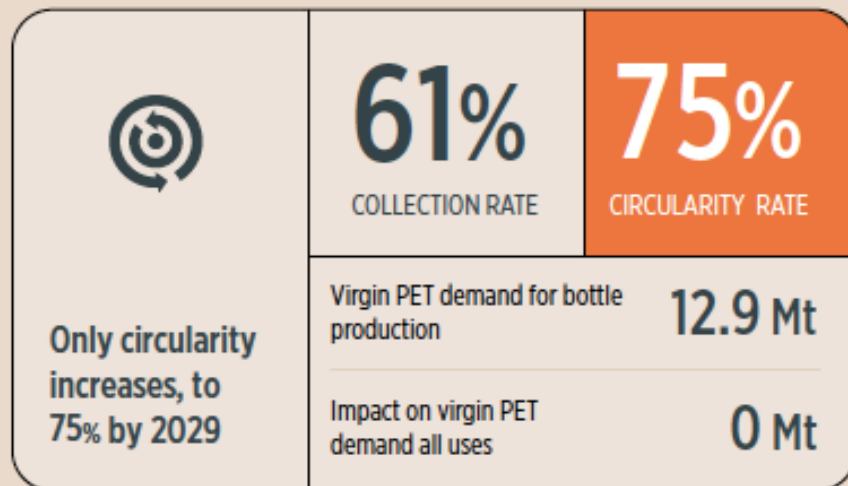
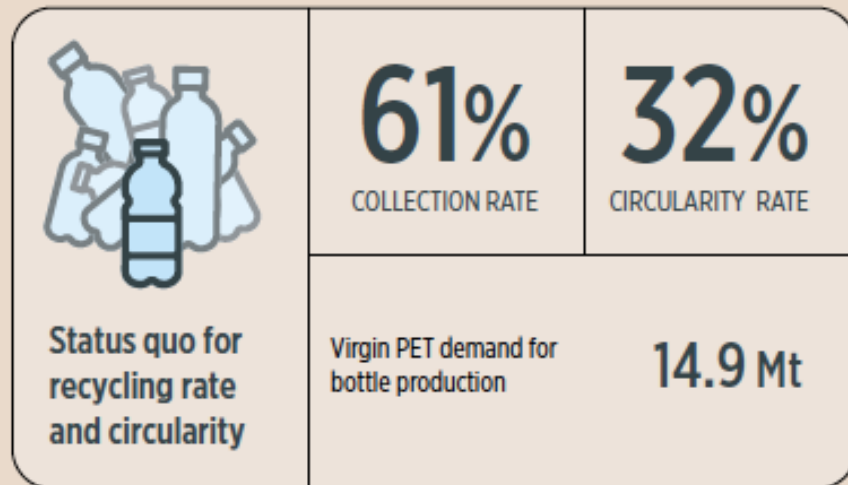


Figure 18: Changes in Virgin demand if Recycling rate is increased

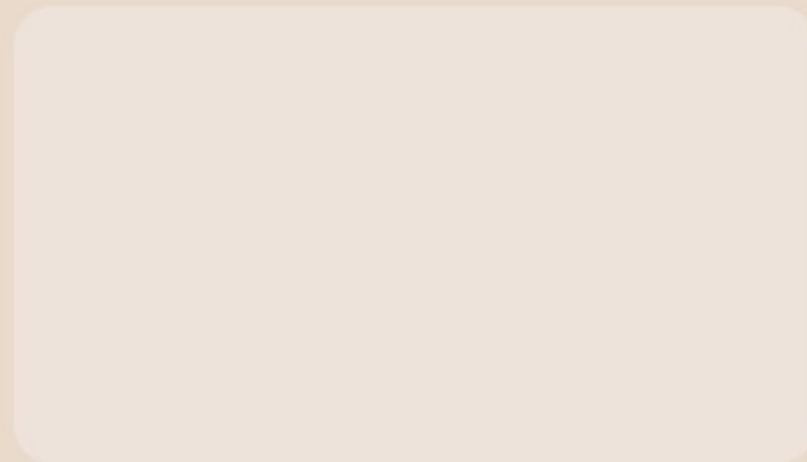
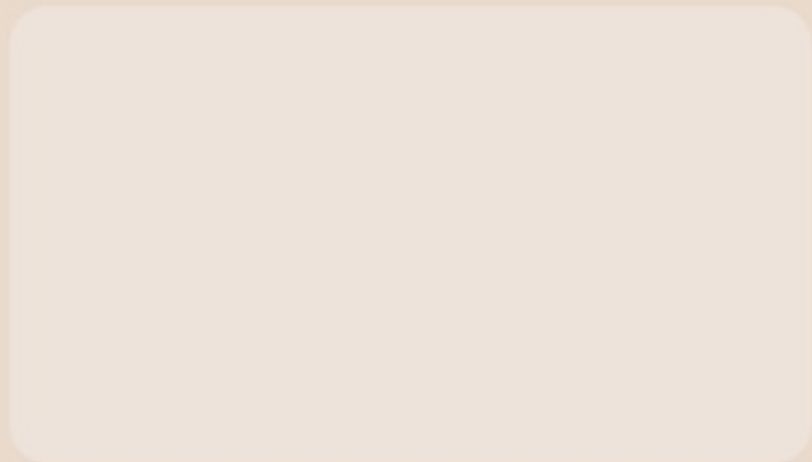
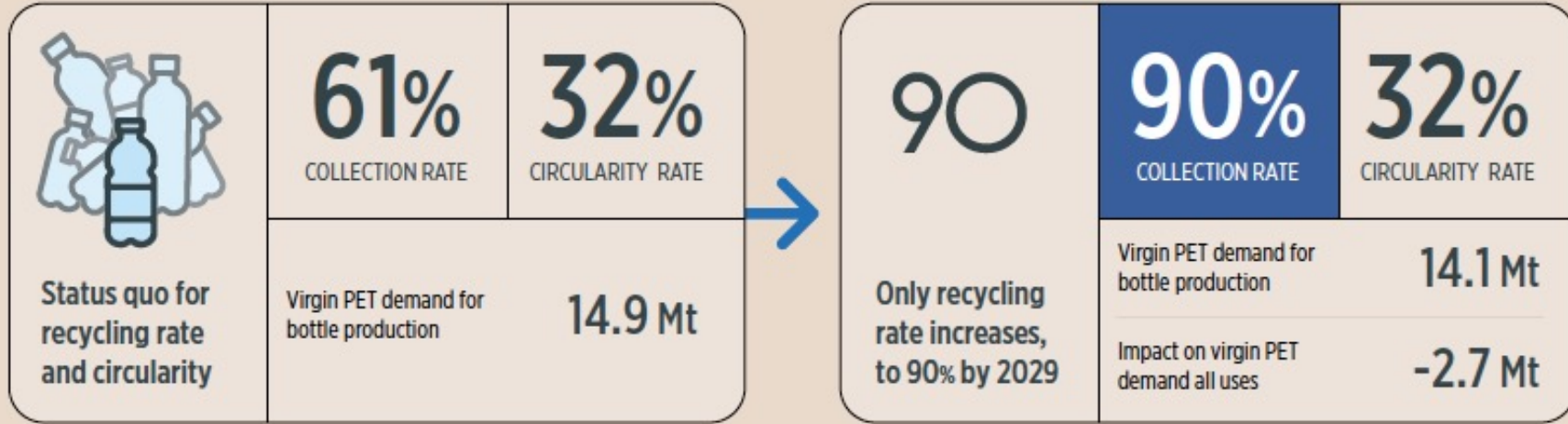


Figure 19: Chang



Status quo for recycling rate and circularity



Only circularity increases, to 75% by 2029



32%
CIRCULARITY RATE

14.1 Mt

-2.7 Mt

75%
CIRCULARITY RATE

11.0 Kt

-2.7 Mt

Figure 20: PET 2022-2041

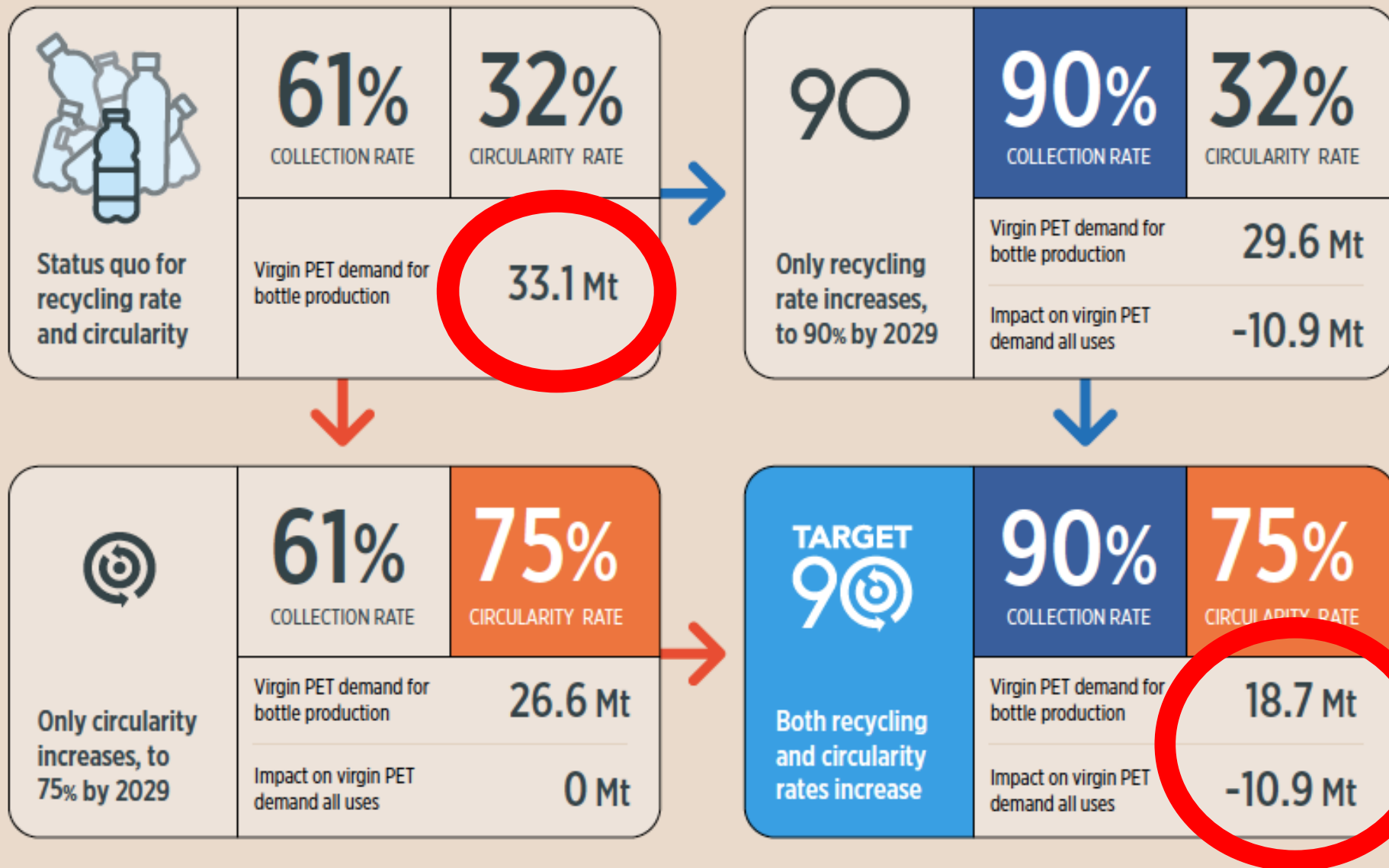


Figure 22: Aluminium 2022-2041

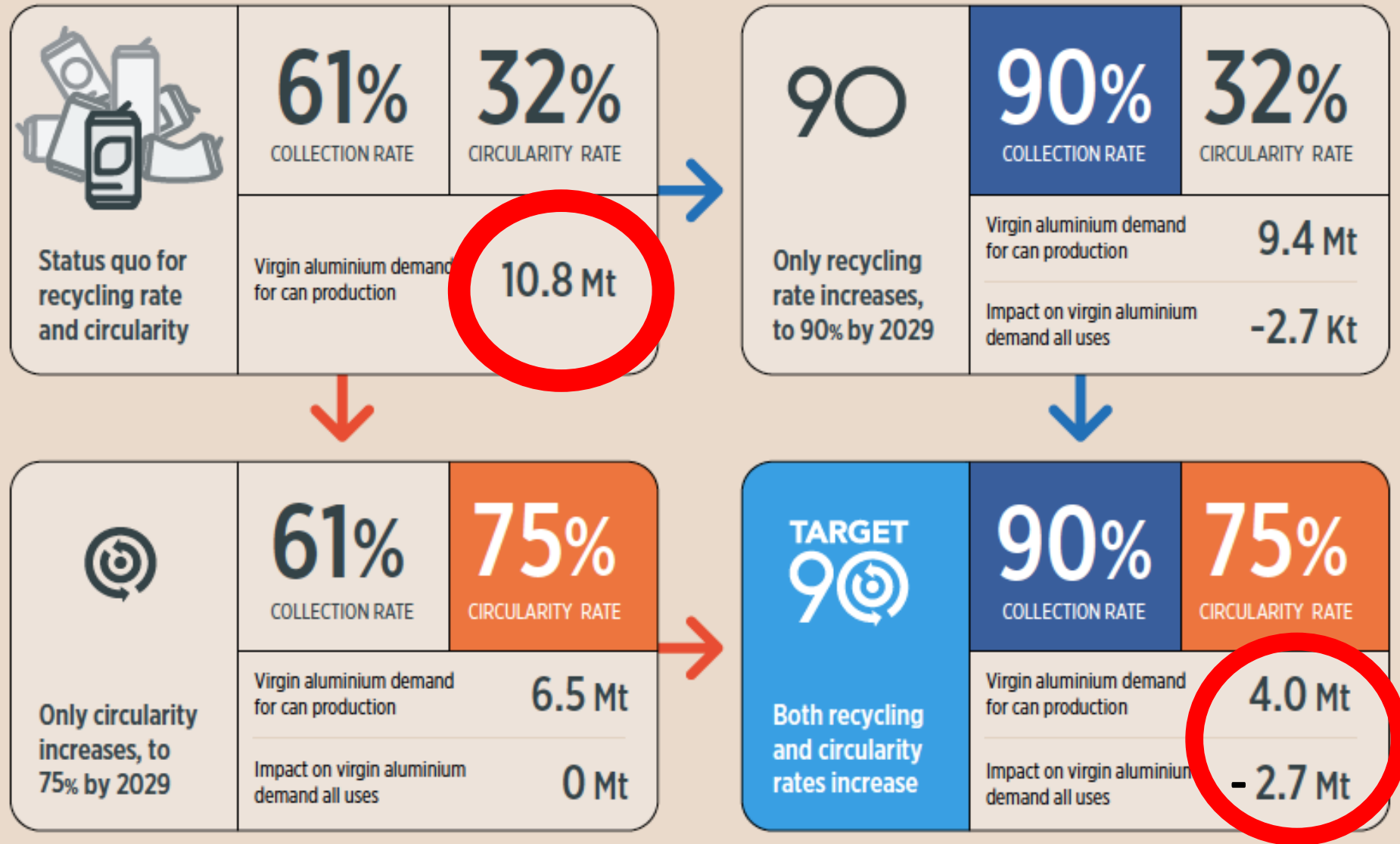
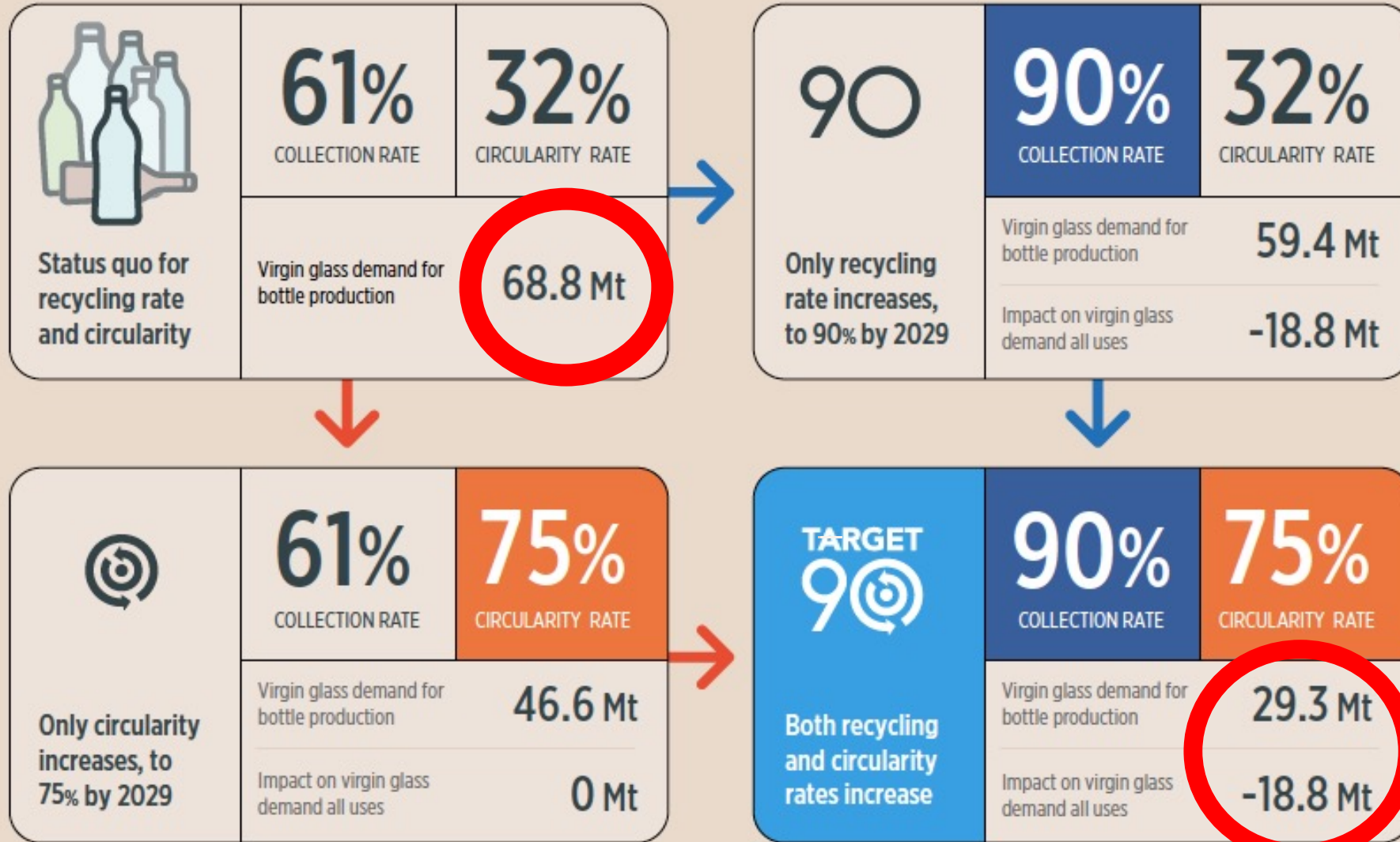


Figure 24: Glass 2022-2041



Thank you!

Clarissa.morawski@reloopplatform.org

