



EPR & DRS SUCCESS STORIES: EUROPE

NERC
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Full-service PRO operator & consulting

We design, implement and operate Producer Responsibility Organizations (PROs) — with decades of EPR experience across eight countries.

2002

FOUNDED

>200

COLLEAGUES

10

LOCATIONS

>270

MILLION TURNOVER



Regulatory understanding

Requirements and impacts of EPR policy: financing, recycling targets and reporting.



Compliance assurance

Ensuring compliance and compliance mechanisms for industry.



Actor coordination

Aligning industry, associations, governments, municipalities and service providers.



System optimization

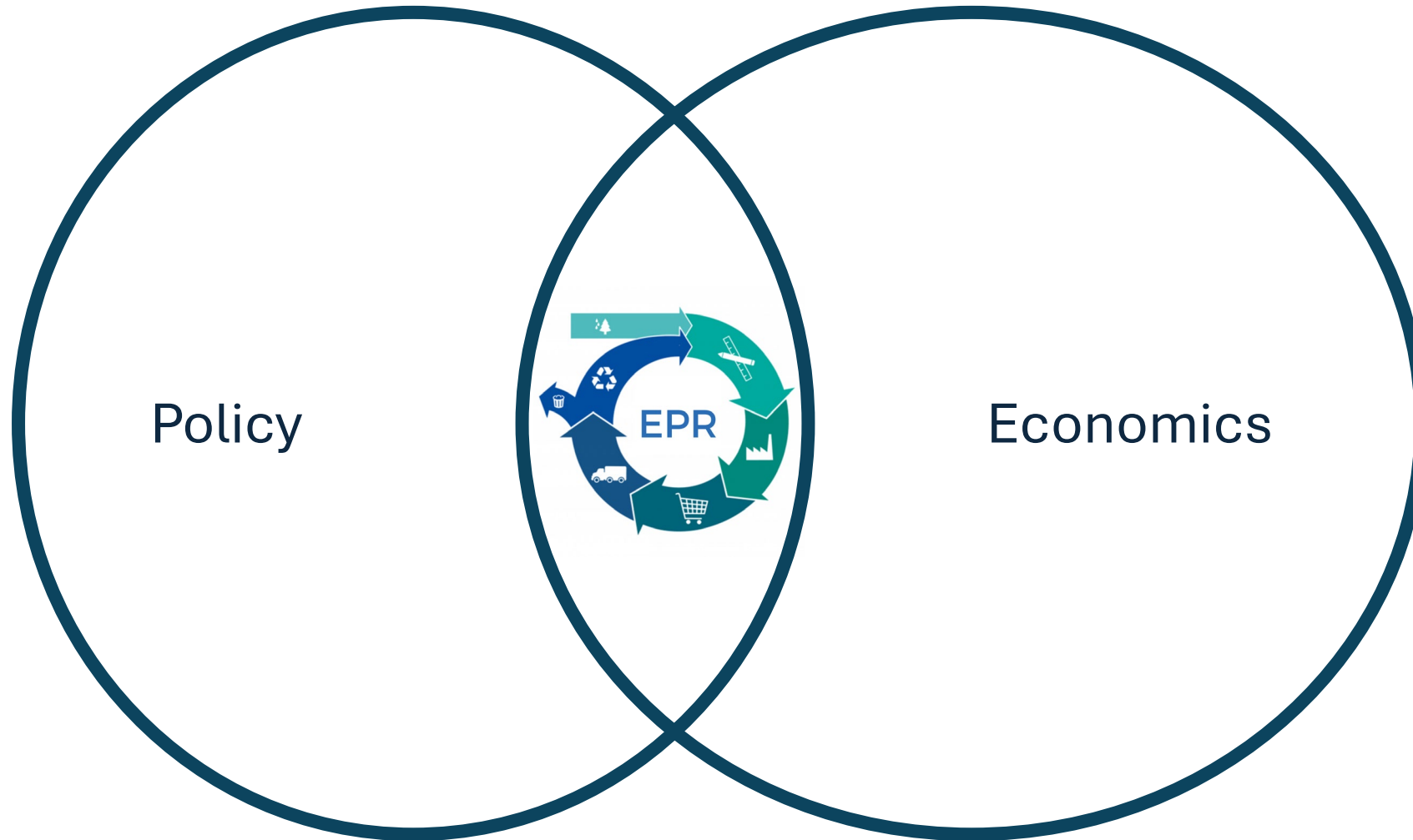
Reporting relationships and transparency mechanisms.

Our PROs

Germany · Canada · France · Austria · Finland · Slovakia · USA



EPR & DRS operate at the intersection of policy and economics

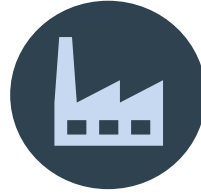


EPR design decisions land on our operations — not just on policy desks



Haulers

Contract terms, route economics, and who you invoice depend entirely on how a province structures PRO responsibility.



Processors

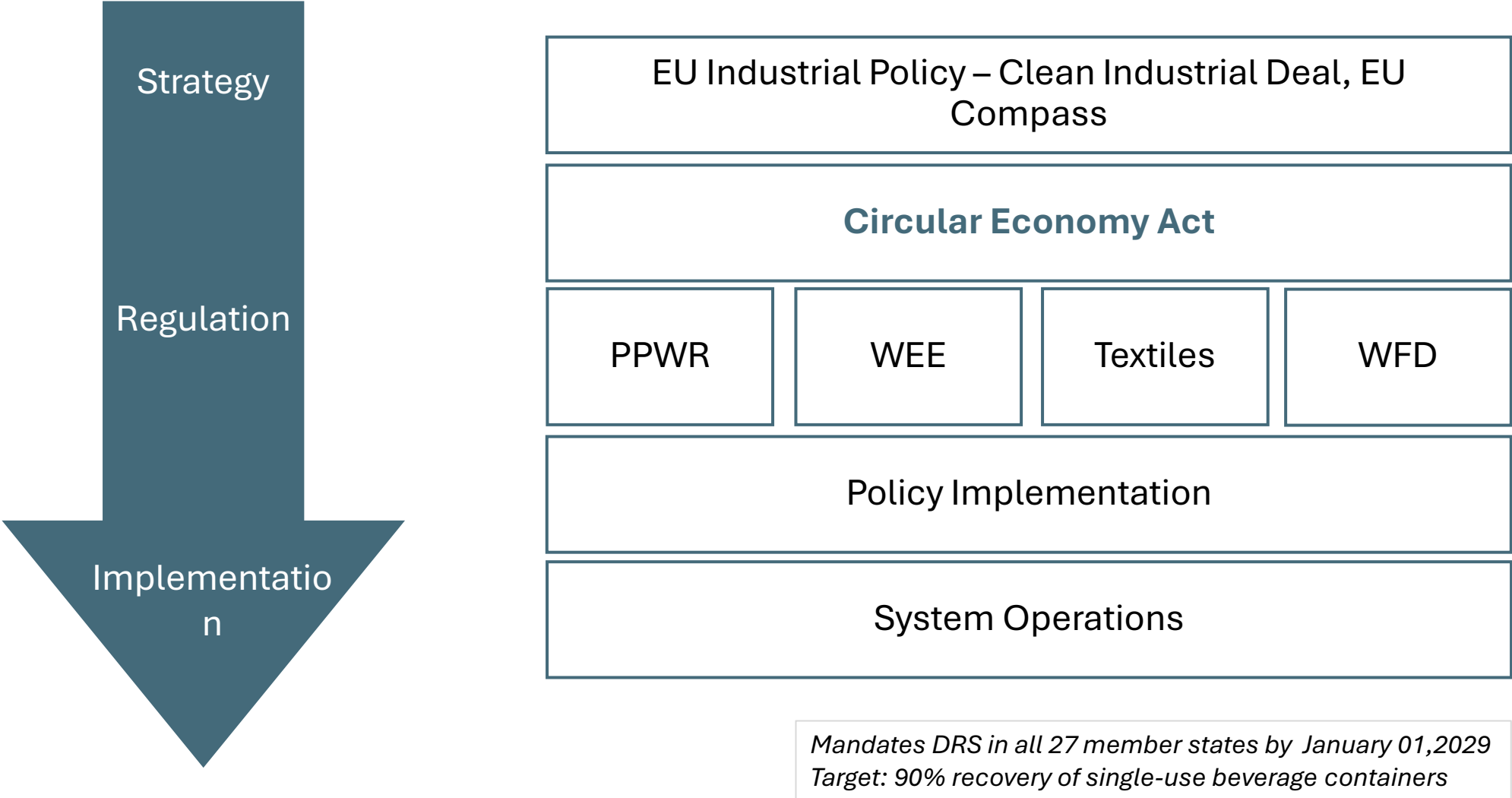
Material specs, volume guarantees, and price stability hinge on who owns the material and who bears commodity risk.



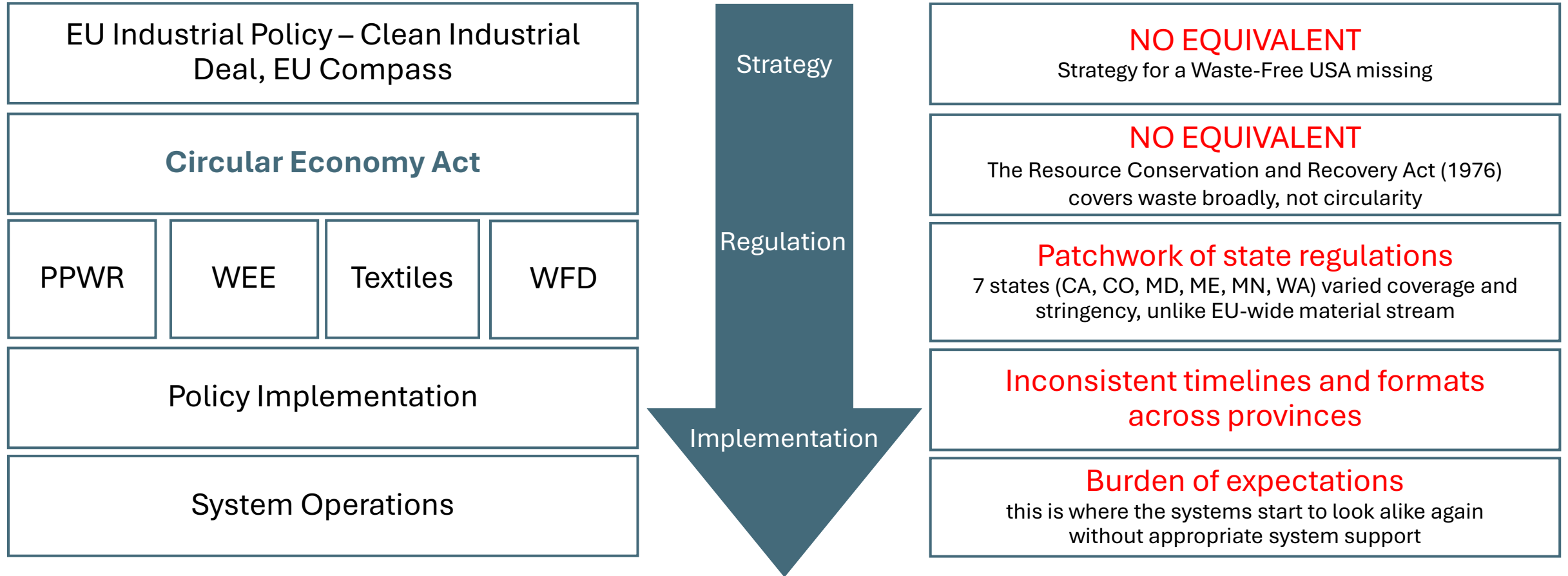
Everyone

Cost recovery models determine whether your margins are protected — or squeezed — when fees get renegotiated.

The EU's new proposed framework for EPR



USA'S Equivalent?



Germany: High-performance EPR, complimented by DRS



69.4%

Overall packaging recycled
(Eurostat, 2023)

Observations from the ground:

- One law - The Packaging Act - creates both the EPR and DRS
- A separate DRS carries the load, 98% of eligible containers returned
- Strong, enforced recycling targets push investment in sorting and recyclability design
- Producers fully fund the system, internalized cost, no public subsidy cushion
- Cost pressure between competing PROs sharpens operational efficiency and drives continuous optimization

Source: EPR system performance in the European Union, June 2026

Takeaway: Competitive EPR complimented by DRS drives high recycling performance

France: competing PROs, no national DRS



69%

Overall packaging recycled
(Eurostat, 2023)

Observations from the ground:

- One law, the French Environmental Code, governs EPR, administered through state approved PROs
- No DRS, but heavy investment and focus on source-separation
- Every producer needs a Unique Identifier (UID) tied to a PRO, verifiable on a public ADEME registry
- Marketplaces (Amazon, etc.) are legally required to verify seller UIDs, closing the e-commerce loophole
- Competing PROs have a commercial incentive to flag non-members, since free-riders undercut paying members on cost

Source: EPR system performance in the European Union, June 2026

***Take away: Recycling performance trails DRS countries
Plastic recycling rates around 42%, illustrating the gap between
EPR-funded sorting alone and DRS-driven separate collection***

Netherlands: DRS phased gradually



75.8%

Overall packaging recycled
(Eurostat, 2023)

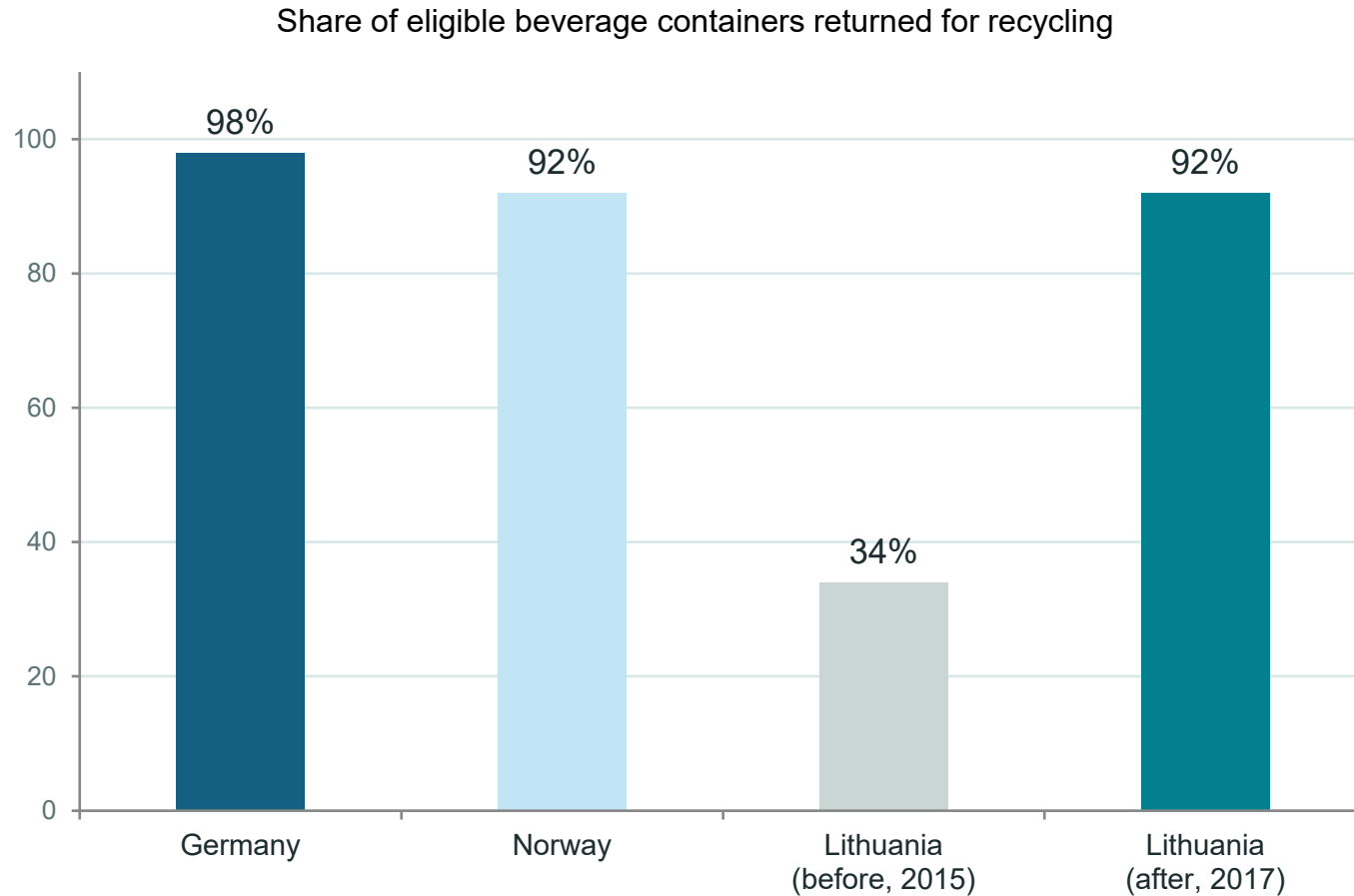
Observations from the ground:

- DRS started with big PET (2006), then expanded to small bottles(2021), then cans(2023) over three decades
- 77% if plastic bottles and 84% of cans returned
- Standardized collection rules apply across every municipality
- Single-PRO structure simplifies data and reporting, but removes the cost-competition that drives Germany's efficiency
- Similar to France, marketplaces (Amazon, etc.) are legally required to verify seller, fulfilling the gatekeeper duty

Source: EPR system performance in the European Union, June 2026

Take away: EPR AND DRS work together, offering high transparency and excellent national coverage for collection of materials

DRS makes beverage container recovery failure proof



Source: TOMRA, Deposit Return Schemes in Europe: How They Compare (2024)

THE TAKEAWAY

Lithuania shows the speed of change possible: 34% under EPR-funded curbside collection alone, jumping to 92% just two years after launching a deposit system in 2016.

A well-designed deposit is the single fastest lever available for beverage container recovery.

Four conditions, present in every high performer



1

Concentrated operational responsibility

PROs hold clear end-to-end accountability for collection through recycling, not fragmented across actors.



2

Full producer cost internalization

Producers cover the true net cost of end-of-life management, not a subsidized fraction.



3

Material ownership enabling value capture

Whoever owns the material can capture (or is exposed to) its commodity value, sharpening incentives.



4

Strong regulatory targets driving innovation

Ambitious, enforced targets push investment in sortation, eco-design, and recovery technology.

ENVIRONMENTAL & BEHAVIOR OUTCOMES

- Collection and sorting outcomes depend on consumer participation rates
- Germany, France and the Netherlands exhibit strong consumer education through centralized or coordinated PRO campaigns
- EPR and DRS systems create the infrastructure and incentives facilitating these required behavior-changes
- EPR & DRS systems encourage companies to integrate sustainable design principles at the early stages of packaging development

40–80%

average reduction in beverage container litter across 20+ European and North American case studies

< 1%

of beverage containers littered in Norway today, down from a highly visible waste stream pre-DRS

71%

drop in small plastic bottles found in Dutch nature as compared to pre-DRS levels

92%

of Norwegians say returning every can and bottle matters to them, evidence the incentive reshaped habits, not just outcomes



Reclay StewardEdge
Product Stewardship Solutions

THANK YOU

For questions, please reach out to:
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