



Key Policy Developments in Deposit Return Systems

March 2025 Update

Since the release of the *Global Deposit Book* in December 2024, several key developments have taken place in the world of deposit return systems (DRS). This document provides a summary of major policy changes, new system implementations and other significant updates that have emerged in recent months.

The updates included here reflect new legislation, regulatory decisions, and system rollouts that have been publicly announced or confirmed post-publication of our report. This list is not exhaustive, and we will continue to monitor and document further developments as they arise.

Jurisdiction	Details
Wales	On 18 November 2024, it was announced that Wales would not proceed with the joint process for the development of a unified DRS in the UK. Following this, on 18 February 2025, the Welsh Government outlined a timeline for establishing its own separate DRS. Stakeholder sessions began in March 2025, providing businesses, environmental groups, and local authorities the opportunity to give feedback on the scheme's implementation, including whether reusable beverage containers should be included. A formal consultation is planned to run from May to October 2025, launching in the summer and lasting 12 weeks. This consultation will gather input from industry and the public on key design elements of the scheme. The responses will then undergo detailed analysis and evaluation from November 2025 through Spring 2026. The Welsh Government intends to publish its findings and next steps in Spring 2026, ensuring the initiative aligns with Wales' recycling priorities. However, the upcoming Senedd election, scheduled for no later than 7 May 2026, may influence future plans. Wales has set a 70% recycling target for 2024-25, with recent reports indicating a rise to 66.6% last year. The decision to include glass containers in the Welsh scheme—unlike in England, Scotland, and Northern Ireland—has also been cited as a factor in moving forward independently.
Scotland	The regulations for Scotland's deposit return system will be debated in the Scottish Parliament in Spring 2025. Once these have passed, the new start date will be aligned with England and Northern Ireland.
England and Northern Ireland	The regulations for deposit return in England and Northern Ireland were passed in the UK Parliament in January 2025. An application for the Deposit Management Organisation (DMO) was submitted in February 2025, and we expect an official appointment to be made in April 2025.
Sweden	In January 2025, Sweden's DRS operator (Returpack) announced that deposit rates will be increasing from 1 SEK to 2 SEK on aluminium cans and small PET bottles, and from 2 to 3 SEK on large PET bottles. Work is now underway, and the first products will be on store shelves in early September 2025.

Jurisdiction	Details
Spain	On 22 November 2024, the Spanish Ministry of Environment announced plans to implement a DRS for single-use plastic beverage bottles under 3L. This follows the publication of a report detailing the country's separate collection efforts in 2023. The report revealed that 214,039 tonnes of plastic bottles (PET and HDPE) were placed on the Spanish market in 2023, with local entities collecting 74,482 tonnes and private entities collecting 14,017 tonnes—resulting in a separate collection rate of just 41.3%. This falls significantly short of Spain's interim target of 70% for 2023, established under national law. Spain's targets align with the EU's Single-Use Plastics Directive, which mandates separate collection rates of 77% by 2025 and 90% by 2029. To bridge the gap, Spain has also set interim national targets of 85% by 2027. Crucially, the law stipulates that a DRS must be introduced if the 2023 target is not met. As a result, the Ministry has confirmed that a nationwide DRS for plastic bottles will now be implemented.
Poland	As of 7 March 2025, there are five approved system operators: Zwrotka SA, PolKa S.A., OK Operator Kaucyjny S.A., EKO-OPERATOR S.A., and Reselekt S.A.
Greece	On 10 February 2025, the Greek government passed the draft Joint Ministerial Decision, setting the stage for the country's DRS. Depending on the timeliness of the adoption of the relevant DRS ordinance, the system could launch in early 2026. The system will cover all beverages in plastic bottles and metal cans up to 3L, excluding wine and wine products, milk and milk products, spirits, liqueurs, and other fermented beverages. A variable-deposit structure will apply: €0.15 for containers larger than 500ml and €0.10 for containers ≤500ml.
Goa, India	The State Government is set to release a revised tender for a system operator by the end of January 2026.
Quebec, Canada	Phase 2 of the modernisation and expansion of the DRS took effect on 1 March 2025. This means that all ready-to-drink plastic beverage containers from 100ml to 2L, including water bottles, sparkling water, milk, juice, soft drinks, and even some spirit bottles, are now subject to a 10-cent deposit, similar to aluminium cans and beer bottles. As a result of this expansion, the number of containers that can be returned for a deposit has increased by 1.2 billion, for a total of more than four billion containers annually. While the DRS was also expected to expand to multi-layered containers, such as milk cartons, and additional glass bottles (e.g., wine and spirits) on 1 March 2025, it was announced in November 2024 that this expansion would be delayed by two years to 1 March 2027.
Tasmania, Australia	On 11 February 2025, it was announced that Tasmania's deposit return scheme will commence on 1 May 2025.
Queensland, Australia	On 20 February 2025, the Queensland government established a parliamentary inquiry into why the state's DRS is failing to meet legislated targets. The inquiry will assess the current state and operation of the scheme, including deposit location coverage and how COEX is operating the scheme. Queenslanders will be invited to share their input on how the programme can be improved to increase its efficiency and effectiveness. A Parliamentary Committee has been assigned to deliver a report on the scheme's performance and potential improvements by August 2025.