Reuse in Retail Initiative: Scoping Phase

What We Learned and Where We Are Going Next

In partnership with:

Upstream

WRAP

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Disclaimer

All Reuse in Retail (RRI) participants have and will continue to comply with applicable federal and state antitrust laws at all times. This is a voluntary initiative, open to all brands and retailers. Pricing charged to customers, market share, and other items relevant to antitrust laws will never be discussed in any RRI meeting or communications. However, each participant will make its own decisions relating to its own packaging and all business practices. Standards, specifications, and recommended best practices will be developed throughout the project. Future identification of, vetting, and rate negotiations with service providers will be done through the program to assist participants—but use of preferred vendors is not required. All vendor contracting decisions will be made by individual companies.

Executive Summary

The Reuse in Retail Initiative (RRI) is a strategic collaboration between the U.S. Plastics Pact (USPP), Upstream, and WRAP (hereby referred to as the RRI Partners Team) designed to accelerate the transition to reusable packaging in retail in an existing packaging Extended Producer Responsibility (EPR) state.

> *Convenience and economic viability are the core conditions for scaling reuse.*

This report summarizes the key learnings and outputs from the Scoping Phase—which was conducted between October 2025 and January 2026—as well as the future scope, policy levers that can accelerate the advancement of reuse in retail, and next steps. The learnings from this phase gave participating companies and the RRI Partners Team the necessary context to determine their preferences for the future scope of the initiative (i.e., rankings of product categories, geographic region, and reuse models). Three tangible outputs were also created—including end-to-end system maps, the consumer experience strategy, and a stakeholder analysis matrix—which are for use by RRI participating companies only.

Key Takeaways

- **The Scoping Phase moved the RRI from exploration to a future path.** Through educational sessions and working discussions, participants aligned on preferred product categories, geography, and reuse model for launch, while also producing tools to support future phases.
- **The recommended course of action is a launch in Portland, Maine, with prepared food using the return-on-the-go reuse model.** The report presents this as the most practical near-term route for building a workable reuse system in retail.
- **Convenience and economic viability across the value chain and for consumers are core conditions to drive the success and scalability of this program.** Friction needs to be minimized as much as possible for all stakeholders, and doing so requires coordinated action.
- **Next steps and future expansion to other regions and product categories depend on both company commitment and supportive policy.** The Program Design Phase is targeted for mid-2026, and the ultimate launch in-store for 2028.

Project Background

Most retail packaging is designed for single use, creating significant waste and emissions. Specifically, 66 million tons of plastic packaging pollutes the global environment each year. New research shows that two thirds of this amount could be eliminated by 2040 through prioritizing reuse and return models.[1] The shift to reusable consumer goods packaging—where packaging is collected, cleaned, and used again—has the ability to deliver economic, social, and environmental benefits to both consumers and industry actors. In support of this movement, Target 5 in the USPP's Roadmap 2.0 is to identify viable reusable packaging systems and increase their implementation and scale by 2030, as part of reducing the use of virgin plastics.

> *Advancing reuse in retail requires coordinated action across brands, retailers, service providers, and policy.*

Concurrently, reuse mandates are on the horizon because of the rapid expansion of packaging EPR in the U.S. Therefore, companies require certainty on how to implement systems that are widely used by consumers, economically viable, and demonstrate environmental benefit once scaled. Advancing this strategy requires coordinated action across brands, retailers, reuse service providers (RSPs), and governments. This effort positions companies to proactively comply with emerging packaging EPR requirements—by building a practical, scalable system that meets both regulatory and consumer expectations.

The RRI is a strategic collaboration between the USPP, Upstream, and WRAP designed to accelerate the transition to reusable packaging in retail in an existing packaging EPR state. It is designed to be a long-term, iterative implementation model, grounded in creating actionable initiatives, shared costs, and building off past pilots. By concentrating efforts to develop a system that is convenient for consumers and has long-term economic viability, companies can lay a foundation that can be expanded to other product categories and regions in the future. The RRI aims to ignite a transition to move more consumer goods products packaged in single-use packaging to reusable packaging.

[1] *Laville, Reuse and return schemes could help eliminate plastic pollution in 15 years, says report, The Guardian, URL*

About the Scoping Phase

The Scoping Phase took place in late 2025, consisting of a series of interactive educational sessions and corresponding workshop discussions amongst nine companies and organizations, as well as the RRI partners team, to choose their preferences on the key determinations for the future of the RRI (i.e., product categories, reuse model, and geographical region). Three tangible outputs were also produced for the use of RRI participating companies only, including end-to-end system maps, consumer experience strategy, and stakeholder analysis matrix.

The RRI Partners Team would like to take this opportunity to express our appreciation to all the speakers, partners, and USPP Reuse Workstream members who provided invaluable insights and expertise in the Scoping Phase. A variety of experts from the sector were brought in for the educational sessions (Table 1), covering various aspects of designing a successful reuse system. The USPP Reuse Workstream also played a key advisory role in the Scoping Phase through knowledge sharing with the brands and retailers participating and providing feedback on tangible outputs for the RRI.

Participants Include:

Henkel

KraftHeinz

L'OCCITANE EN PROVENCE

pact

Unilever

Table 1. Scoping Phase Meeting Topics, Descriptions, and Speakers

NO.	MEETING TOPIC	DESCRIPTION	SPEAKERS
1	Phase Kickoff & Educational Session: End-to-End System Mapping Overview	• Scoping Phase kickoff • Guest speaker presentations on end-to-end reuse system mapping overview, reverse logistics, and governance • Q+A	• Crystal Dreisbach, CEO, Upstream • Leah Wistrand, Special Advisor, WRAP • Stuart Chidley, Co-Founder, Reposit and Beauty Kitchen
2	Educational Session: Product Categories for Reuse	• Guest speaker presentations on best-fit product categories for reuse and key considerations for each • Q+A	• Tom Szaky, CEO, TerraCycle • Helen Clements, Director, GoUnpackaged • Stuart Chidley, Co-Founder, Reposit and Beauty Kitchen
3	Educational Session: Reuse Policy and Regional Considerations	• Guest speaker presentations on current state of EPR reuse mandates and city/regional considerations, including existing washing infrastructure • Q+A	• Sydney Harris, Policy Director, Upstream • Hilary Near, Commercial Zero Waste Senior Coordinator, City and County of San Francisco • Christine Batikian, Environmental Supervisor II, Solid Resources Citywide Recycling, LA Sanitation & Environment • Suz Okie, Co-Founder & Co-Lead, Reuse Maine • Tim Debus, President & CEO, Reusable Packaging Association
4	Determining RRI Product Categories and Region	• Workshopping and discussion to determine product categories and region for the RRI	• Group discussion
5	Educational Session: Reuse Models	• Guest speaker presentations on real world applications of return-on-the-go and return-from-home models and learnings • Q+A	• Catherine Conway, Director & Policy Lead, GoUnpackaged • Kieran Demangeat, Reuse Project Manager, Citeo • Mike Newman, CEO, Returnity Innovations
6	Determining RRI Reuse Model	• Workshopping and discussion to determine reuse model for the RRI	• Group discussion
7	Determining RRI Reuse Model	• Guest speaker presentations on consumer engagement around reuse • Q+A	• Leah Wistrand, Special Advisor, WRAP • Tony McGurk, Chairman & CEO, re-universe
8	Educational Session: Stakeholder Analysis & Phase Closing	• Guest speaker presentations on engaging internal stakeholders and Reuse City Ottawa Project • Q+A • Sneak peek of the Program Design Phase	• Stuart Chidley, Co-Founder, Reposit and Beauty Kitchen • Charles Binks-Collier, Founder and CEO, Circulr

Future Scope

Based on the learnings from the Scoping Phase and insights from project partners, advisors, and additional reuse experts, the RRI Partners Team recommends the following course of action for the participating brands and retailers:

- **Region:** Start in Portland, Maine, with future expansions to other packaging EPR states, such as California
- **Product Category:** Start with prepared food in Phase 1, with potential expansion to other product categories in Phase 2 (fresh produce, home care, and/or personal care)
- **Reuse Model:** Return-on-the-go

More context for why each of these preferences was determined is provided in this section. Ultimately, future RRI participants will have full discretion over the product categories and SKUs they choose to launch in store.

Product Categories

Discussions amongst the participating companies and reuse experts in the Scoping Phase as well as the findings from the USPP's *Getting Ready for Reuse in Retail Report* with Closed Loop Partners—which revealed key product categories best fit for reuse in the US—helped to inform the product category preferences for the RRI. Based on these discussions, prepared food was identified as the recommended initial product category for the first launch. Within this category, rotisserie chicken emerged as a potential ideal SKU due to its high sales volumes, which would help build consumer habits to boost return rates, enabling sustainable financial and environmental outcomes. Similar to prepared food, fresh produce was another product category highly preferred by Scoping Phase participants due to the ease of implementation and also being prepared and packed in-store.

Source: Closed Loop Partners & USPP Getting Ready for Reuse in Retail

> *The recommended starting scope is intentionally narrow to enable a practical, scalable system in retail.*

It is important to note that the more product categories and SKUs offered in reusable packaging in-store, the more consumers will gain exposure and experience using the reuse system, ultimately boosting return rates. As previously introduced, home and personal care products were also of high interest, depending on the specific SKU being considered and the presence of existing co-packing facilities in the region. Overall, prepared food and/or fresh produce were determined to be the easiest product categories to transition to reuse in retail environments, with home and/or personal care as the next easiest.

In order to identify which SKUs of interest were most preferred to transition to reusable packaging amongst the Scoping Phase participants—especially within the home and personal care product categories—high-medium-low charts were developed. The SKU rankings in these charts are available to Scoping Phase participants only. Table 2 details the criteria that were used to determine which SKUs would be easiest to transition to reuse in these charts.

Table 2. Criteria Used For Ranking SKUs of Interest in Each Product Category of Consideration

CRITERION TYPE	CRITERIA EASING TRANSITION TO REUSE FOR DIFFERENT SKUs	IMPACT OF CRITERIA ON REUSE TRANSITION
Packaging Design	Uniform packaging geometries and labeling mechanisms across brands, SKUs, and product categories; brands selling this SKU likely don't heavily rely on packaging shape for brand identity	Standardized packaging that can be used across SKUs and categories reduces costs
	Standard packaging design for this SKU and labeling is easy to integrate into existing washing infrastructure (e.g., there are existing wash hubs for reusable packaging for food service)	Utilizing existing infrastructure reduces costs
	Not widely packaged in lighter weight formats (e.g., flex film); existing single-use alternative is durable to begin with	Lighter weight packaging will often perform better on the LCA; easier to transition to reuse with packaging that is already fit for reuse
Product Contents	Minimal risk of cross-contamination between washes	Lower safety risk for the product itself; complies with FDA regulations
	Does not contain high risk or reactive chemicals to the packaging (e.g., if the packaging is being filled with different products each time)	Less likelihood of the packaging deteriorating (perhaps at a faster rate) overtime; complies with FDA regulations
	Non-perishable product (e.g., dry goods)	These products can last longer when stored in bulk at filling locations, are easier to clean, and are often perceived safer by consumers too; complies with FDA regulations
Consumer Experience	Ease of purchase and return	Using reuse system has limited friction is intuitive for consumers
	Post-use residue can be easily washed	Packaging is easier to clean for customer and at wash hub
	Product is or can be catered toward sustainably-minded consumers (e.g., organic, non-toxic, zero waste)	This consumer segment may be more likely to take part in a reusable packaging system in retail
Other	Existing motivation amongst companies selling this SKU to transition to reuse	Industry interest and proof of concept in certain SKUs may increase probability of successfully engaging internal stakeholders
	Existing regulatory motivation to transition this SKU to reuse (e.g., prioritizing large containers, hard to recycle formats, food service packaging, etc.)	Legislative risk for certain SKUs may increase likelihood of companies offering those product types to transition to reuse at scale
	SKU has high sales volumes/frequency of purchase (ideally the top 20% within the product category)	Creates bigger datasets, greater availability for consumers and therefore uptake/return rates, and faster ROIs

Geographical Region

The regions considered for the project were the seven US states with existing packaging EPR laws as of 2025. While only one state will be selected for the initial launch, the goal is to expand to other existing or "next up" packaging EPR states later. The specific geography will be a metropolitan city (and potentially surrounding areas) with existing co-packers and/or distribution centers nearby for the selected products. Coastal cities are also well positioned due to residents' proximity to marine environments. This will enable the use of environmental messages related to marine environments to spread awareness and potentially act as a motivator to change attitudes towards the purchase of products in reusable packaging.

The preferences amongst Scoping Phase participants, along with their relevant regulatory reuse targets, were:

- California (SB 54 requires that at least 2% of single-use plastic packaging be converted to reuse/refill models by January 1, 2027, increasing to a minimum of 4% by 2032[2])
- Maine (implementing regulations for the packaging Stewardship Program set a target market share for reusable packaging of 15% by 2039[3])

Despite being the second preference, the RRI Partners Team will focus on Portland, Maine as the initial region for launch, with the plan to expand to California in the future. A variety of factors contributed to this decision, including:

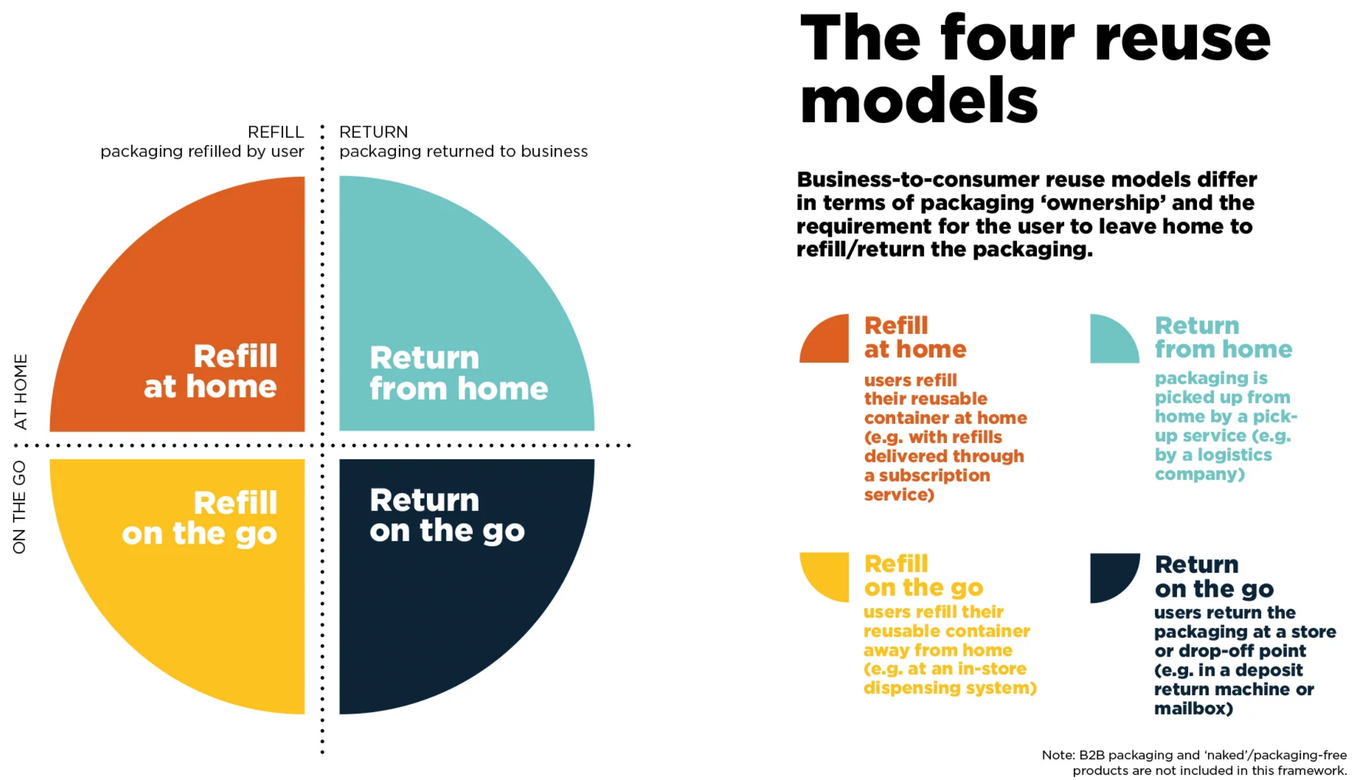
- Robust beverage Deposit Return System (DRS) with learned consumer behavior around return models (77%+ redemption[4])
- Existing reuse in retail program with Smiling Hill Farms at Hannaford
- Coastal, resourceful, reuse-forward city with a thriving resale economy
- Engagement around more reuse shown by the upcoming University of Maine Reusable Food Packaging Research Project in Bath, Bar Harbor, and South Portland, which may be a source of additional washing infrastructure

[2] *Brandon, California Senate Bill 54: Tackling Plastic Pollution at the Source, Ocean Conservancy, URL*
[3] *Stewardship Program for Packaging, Maine Department of Environmental Protection, 2024, URL*
[4] *Bottle bill states and how they work, TOMRA, 2023, URL*

Reuse Model

All four of the Ellen MacArthur Foundation's reusable packaging models[5] (Figure 1) were considered for the RRI. Due to initial feedback from various retailers concerned with spilling and contamination using refill models—as well as input within the RRI Partners Team that return models prevent more waste and more closely mimic single-use packaging, making consumer adoption easier—the scope of the RRI was limited to return models early on. After further workshopping, Scoping Phase participants aligned around the preferred reuse model for the RRI being return-on-the-go, with return-from-home only being of interest if there is an existing home delivery system serviced by the retailer.

Figure 1. Ellen MacArthur Foundation's Four Reusable Packaging Business Models[5]



[5] *Reusable Packaging Business Models, Ellen MacArthur Foundation, 2023, URL*

Where We Are Going

Driving consumer-facing reuse systems to scale will require supportive policy frameworks and sustained company commitment. Together, coordinated policy action and dedicated corporate engagement form the foundation for advancing the RRI from a vision to execution.

Policy Levers for Advancement

The following policy levers can accelerate the growth of consumer-facing reuse in retail systems by lowering costs for participating producers, increasing return rates, and maximizing overall return on investment. These recommendations build on the USPP's *Reuse Policy Guidance*.

1. **EPR fee structures should incentivize joint action between brands and retailers, creating the collaboration and shared costs needed to scale consumer-facing reuse in retail.** For example, in Maine, multiple producers can collaborate to implement this type of system as an alternative collection program, which allows them to set their own fees for covered reusables and manage them outside of the statewide Stewardship Organization (SO).[6]
2. **Policies can require Producer Responsibility Organizations (PROs) to fund return infrastructure, such as wash hubs and collection systems.** Directing PROs to invest in shared infrastructure can significantly improve cost efficiency for companies in the early stages of reuse implementation. For instance, France's packaging PROs are all required to spend at least 5% of their annual operating budgets on reuse systems for covered packaging materials[7], and this is catalyzing tremendous growth of reuse systems in France. The time required to develop this infrastructure should also be factored in when establishing deadlines for meeting EPR targets to make sure they are feasible. While some PROs are initially focusing on the implementation of other reuse models (e.g., refill-from-home), return-on-the-go systems in retail will likely be necessary to meet their targets and infrastructural investment in those systems should be prioritized as soon as possible.

> *Policy plays a critical role in reducing costs, enabling infrastructure, and accelerating reuse adoption at scale.*

3. **PRO program plans should proactively identify and potentially propose mitigation strategies at the state and federal level for producers to overcome intersectional barriers that may impact the execution of reuse in retail.** Barriers that may arise include existing labeling laws, health and safety codes, and property ownership laws (i.e., does the retailer or a landlord own the parking lot that may house the collection site?) that do not include clear guidance for reuse systems.
4. **Reuse should be integrated into DRS and EPR legislation, reducing costs for companies to develop reuse infrastructure and increasing scalability.** Reuse in retail efforts should also prioritize states with packaging EPR and/or robust bottle DRS programs, as this overlap minimizes the need for duplicative investments in collection.
5. **Public procurement and community pilots can catalyze market adoption.** Government procurement policies can give preference to or require reusable packaging and products, providing proof of concept and a foundation for scaling reuse beyond individual contracts. Complementary policies that fund or authorize community pilots can help municipalities develop best practices, build public familiarity with reuse systems, and incentivize consumer participation.

[6] *Stewardship Program for Packaging, Maine Department of Environmental Protection, 2024, URL*
[7] *Financer le développement du réemploi, CITEO, 2025, URL*

Next Steps

Advancing to the next stages of the RRI (Figure 2) will require sustained, collective commitment from brands and retailers to co-create the reuse system, alongside meaningful progress on the policy levers outlined in this report.

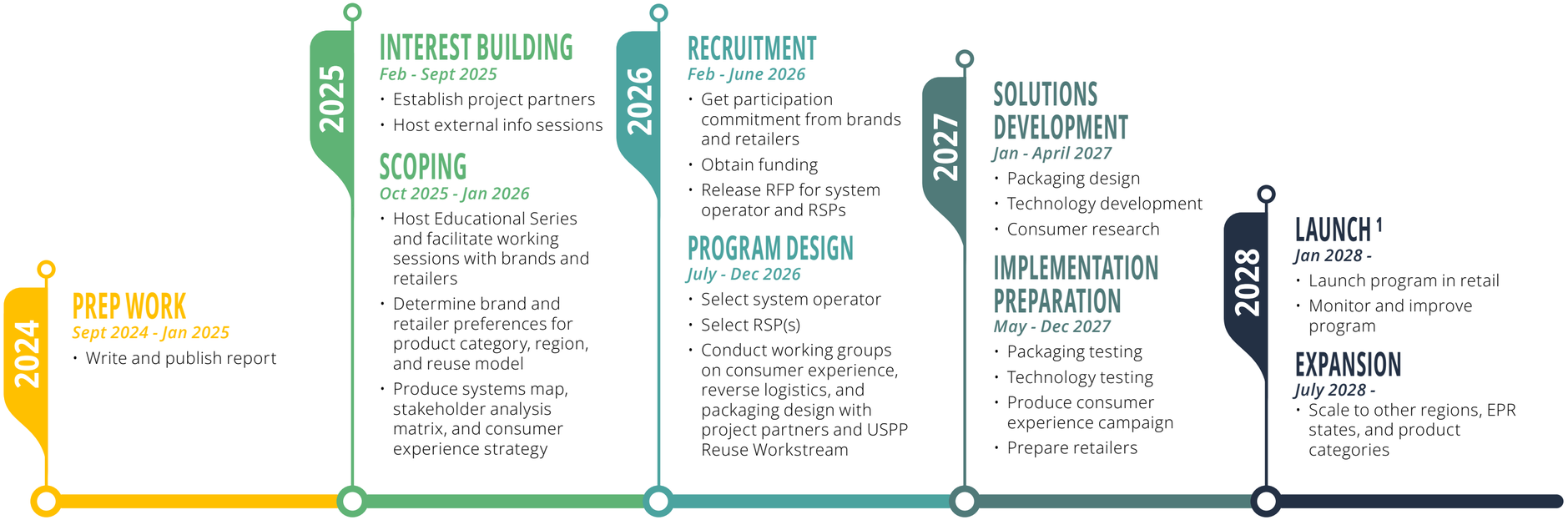
With both of the above conditions met, the next phase—Program Design Phase—is targeted to begin in mid-2026, to be made up of the brands and retailers committed to designing and executing the RRI program with their products in-store. The Solutions Development and Implementation Preparation Phases would then take place in 2027, entailing testing for packaging quality/safety and technology, formulation of the consumer campaign, and dedicating ample time to train the retailer employees to run the program in store.

Finally, the Phase 1 and Phase 2 launches in-store would take place in 2028, where the system will continue to be monitored and improved. This iterative implementation model will allow for the development of an effective system before expanding to additional product categories and regions.

Brands and retailers have a unique opportunity to be a champion in this movement toward developing a reuse system for retail products in the US, unlocking substantial economic, environmental, and social benefits.

To learn more about getting involved in future phases of the RRI, please reach out to Annika Furr, Program Manager of Reuse and Reduction, USPP at afurr@usplasticspact.org.

Figure 2. Program Timeline & Phases



[1] For home care and personal care product categories, allow six months extra to prepare before launch.

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