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Deposit Return System (DRS) Infrastructure Market Forecasts to 2034 – Global Analysis By Infrastructure Component (Reverse Vending Machines, Collection Kiosks, Sorting & Counting Systems, Deposit Management Platforms, Transportation & Logistics Infrastructure, Other Infrastructure Components), By Container Type, By Technology, By Application, By End User and By Geography

https://marketpublishers.com/r/DD78F02F9D87EN.html
Date: April 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: DD78F02F9D87EN

Abstracts

According to Stratistics MRC, the Global Deposit Return System (DRS) Infrastructure Market is accounted for $7.8 billion in 2026 and is expected to reach $21.5 billion by 2034 growing at a CAGR of 13.5% during the forecast period. The Deposit Return System (DRS) Infrastructure Market includes systems and technologies used to collect and recycle beverage containers through refundable deposits. Consumers pay a small deposit when purchasing products and receive a refund upon returning empty containers to designated collection points or reverse vending machines. The infrastructure includes collection centers, sorting systems, logistics, and digital tracking platforms. DRS improve recycling rates, reduces litter, and ensures high-quality material recovery. Governments and organizations implement these systems to promote circular economy practices and reduce environmental impact from packaging waste.

Market Dynamics:

Driver:

Increasing focus on waste collection efficiency

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Deposit return systems incentivize consumers to return beverage containers, thereby reducing litter and enhancing recycling rates. Automated recognition technologies streamline collection and sorting processes. Governments and municipalities are adopting DRS models to meet sustainability targets. Public awareness campaigns are further reinforcing participation. This growing focus on efficiency continues to accelerate global market expansion.

Restraint:

Complexity in system implementation logistics

Establishing DRS infrastructure requires coordination among retailers, municipalities, and recycling operators. Integration of collection points, reverse vending machines, and tracking systems adds operational complexity. Smaller regions often face challenges in scaling infrastructure effectively. High setup costs and logistical hurdles slow adoption. These complexities continue to hinder seamless deployment of DRS models.

Opportunity:

Integration with digital tracking technologies

Barcode recognition, RFID, and blockchain solutions enhance transparency and accountability in return systems. Real-time monitoring improves efficiency and reduces fraud. Digital platforms enable consumers to track deposits and refunds seamlessly. Partnerships between technology providers and municipalities are driving innovation. This digital transformation is expected to accelerate adoption and strengthen competitiveness in the sector.

Threat:

Fraud and misuse of return systems

Issues such as cross-border returns, counterfeit barcodes, and system manipulation undermine credibility. Fraudulent activities increase operational costs and reduce consumer trust. Regulatory enforcement is often required to mitigate risks. Service providers face reputational challenges if systems are compromised. This threat continues to challenge the reliability of DRS infrastructure.

Covid-19 Impact:

The Covid-19 pandemic had mixed effects on the DRS infrastructure market. Lockdowns and restrictions disrupted collection operations and delayed infrastructure rollouts. However, heightened awareness of sustainability reinforced long-term demand for efficient recycling systems. Digital and contactless technologies gained traction as health concerns limited manual handling. Online awareness campaigns boosted consumer participation in return programs.

The barcode recognition systems segment is expected to be the largest during the forecast period

The barcode recognition systems segment is expected to account for the largest market share during the forecast period as it forms the backbone of deposit return infrastructure. Barcode systems provide cost-effective, reliable, and widely adopted solutions for container identification. Retail penetration of barcode-enabled reverse vending machines is higher compared to other technologies. Manufacturers continue to innovate with enhanced accuracy and fraud prevention features. Rising demand for scalable solutions further strengthens this segment’s dominance.

The government & municipal authorities segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the government & municipal authorities segment is predicted to witness the highest growth rate due to their central role in implementing DRS infrastructure. Municipalities are increasingly adopting automated systems to meet recycling targets. Government-backed mandates and funding programs are accelerating deployment. Partnerships with technology providers enhance efficiency and credibility. Rising consumer awareness campaigns are boosting participation in public recycling initiatives.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share owing to established recycling infrastructure and strong regulatory frameworks. The U.S. and Canada are leading adopters of deposit return systems. Government-backed initiatives and sustainability mandates are driving innovation. Strong purchasing power supports premium adoption of automated systems. Awareness campaigns and digital platforms further strengthen visibility.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR driven by rapid urbanization and rising waste generation. Countries such as China, India, and Japan are increasingly adopting DRS models to address sustainability challenges. Government initiatives promoting recycling are boosting investment in infrastructure. Local startups are entering the market with cost-effective solutions, expanding accessibility. Expansion of digital technologies and e-commerce ecosystems is further supporting growth.

Key players in the market

Some of the key players in Deposit Return System (DRS) Infrastructure Market include TOMRA Systems ASA, Envipco Holding N.V., RVM Systems AB, SULO Group, Tetra Pak International S.A., Veolia Environnement S.A., SUEZ S.A., Bulk Handling Systems, Machinex Industries Inc., B?hler Group, Krones AG, Sidel Group, ALPLA Group, TOM Environmental Solutions, Repant ASA, Anker Andersen A/S and Diebold Nixdorf.

Key Developments:

In September 2025, Envipco hosted a Capital Markets Day in Oslo to outline its strategy for capturing a significant share of the growing DRS market, targeting a 40% gross margin and 20% EBITDA margin . The company highlighted an expected global demand for over 200,000 new RVMs in the next five years, representing a €4 billion market opportunity.

In June 2025, TOMRA launched the TOMRA R2 system in Romania, a next-generation reverse vending machine capable of accepting all three material types (plastic, glass, metal) without requiring consumer pre-sorting . This innovation simplifies the return experience and supports Romania's ambitious.

Infrastructure Components Covered:

Reverse Vending Machines

Collection Kiosks

Sorting & Counting Systems

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- Deposit Management Platforms
- Transportation & Logistics Infrastructure
- Other Infrastructure Components

Container Types Covered:

- PET Bottles
- Glass Bottles
- Aluminum Cans
- Refillable Containers
- Other Container Types

Technologies Covered:

- Barcode Recognition Systems
- AI-Based Container Recognition
- Automated Sorting Technology
- Digital Deposit Tracking Platforms
- Other Technologies

Applications Covered:

- Retail Store Collection Points
- Supermarket Recycling Stations

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Transportation Hub Collection Points

Event & Venue Recycling Programs

Other Applications

End Users Covered:

Retail Chains

Supermarket Operators

Government & Municipal Authorities

Beverage Manufacturers

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

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- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

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South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

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What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

- Company Profiling
  - Comprehensive profiling of additional market players (up to 3)
  - SWOT Analysis of key players (up to 3)
- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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