Country profile

SOUTH AFRICA

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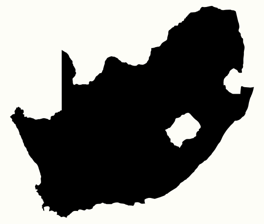

Benefiting from a strong legacy of returnable beverage packaging, South Africa possesses some of the most advanced circular infrastructure in the region. The country is now leveraging its mandatory EPR framework to expand refill systems across broader consumer categories.

SNAPSHOT ON REFILL IN SOUTH AFRICA

No binding legal or policy instruments that sets reuse targets or directly regulate businesses adopting refill solutions.

Mandatory EPR scheme.

Well-established voluntary deposit-return systems for glass bottles.

Plastic Pact present in country.

More than five refill enterprises.

No brand commitments for refill.

Small range of products present in refill:
Mainly food and beverages.

Voluntary deposit-return systems exist for glass bottles
No formal DRS for plastics.

1. Refill context

Refill and reuse practices have a long history in South Africa, particularly through returnable glass packaging systems in the beverage sector. Deposit-return systems for soft drinks and beer remain widely used and are supported by established collection and redistribution networks. In recent years, new refill and reuse models have begun to emerge beyond these traditional formats, including in-store refill stations, bulk dispensing, and returnable packaging schemes across personal care, home care, and selected food categories. However, adoption remains uneven and largely concentrated in urban areas and higher-income consumer segments.

Compared to other emerging markets, South Africa benefits from relatively more developed retail infrastructure, logistics capabilities, and private-sector engagement in circular economy initiatives. However, scaling remains constrained by cost, consumer convenience, and the need for investment in reverse logistics and operational systems. Differences in municipal waste management performance also create uneven enabling conditions across regions.

At the policy level, South Africa does not yet have specific legal or regulatory instruments that set refill and reuse targets. However, strong waste management regulation and EPR frameworks are shaping the transition towards circular packaging systems. While current implementation focuses primarily on recycling, these frameworks provide a foundation that could support the expansion of reuse over time.

2. History of refill

Refill and reuse practices in South Africa have a long commercial and cultural history, particularly through returnable packaging systems in the beverage sector. Deposit-return schemes for soft drinks and beer have been widely used for decades and remain supported by established collection, redistribution, and retail networks. These systems have generated specific local terminology; for example, large returnable 750ml beer bottles are commonly known as "quarts," while smaller returnable bottles are referred to as "pints," distinguishing them from single-use bottles often called "dumpies" Hosking, 1998. Major beverage companies such as Coca-Cola and South African Breweries have historically played a central role in scaling these models.

Alongside these formal systems, refill and bulk purchasing practices are also embedded in the informal retail economy. In townships and low-income areas, small neighbourhood convenience shops known as "spaza" shops provide essential goods in flexible formats, allowing consumers to purchase small quantities or refill containers to manage household budgets African Circular Economy Network, 2025. These models are primarily driven by affordability and food security, but they also reinforce familiarity with reuse-based consumption.

South Africa also has a broader legacy of resource conservation rooted in Indigenous knowledge systems and informal economies, where repurposing materials and extending product lifecycles have long supported household resilience Maduna et al., 2026.

In recent years, new refill and reuse approaches have begun to emerge in more formal retail and commercial settings, including in-store refill stations, bulk dispensing, and returnable packaging models across personal care, home care, and selected food categories.

3. Policy landscape

South Africa has developed one of the more advanced waste management and circular economy frameworks among emerging markets. While only around 10% of total waste is recycled nationally Baxter, 2023, the country performs relatively well in plastics recovery, recycling more than 430,000 tonnes annually Plastics SA, n.d. Collection systems for certain packaging streams such as PET bottles are particularly strong through industry-led producer responsibility organisations.

Despite these advances, the country does not yet have binding targets specifically promoting refill and reuse systems. However, strong regulatory foundations, extended producer responsibility, and growing industry collaboration are creating an enabling environment for South Africa to transition from a voluntary, market-driven system towards a more regulated and mandatory framework for upstream prevention.

Foundational legislation

A major turning point in South Africa's waste governance was the *National Environmental Management: Waste Act (NEM:WA) 2008*, which formally established the 3R waste hierarchy (reduce, reuse and recycle) as the guiding principle for national waste management South African Government, 2008. The law introduced an integrated approach to waste prevention, resource recovery, and lifecycle management across value chains.

The National Waste Management Strategy (NWMS) 2020 operationalises this framework and sets ambitious national targets, including diverting 40% of waste from landfills within five years, explicitly prioritising reuse and recycling over disposal DFFE, 2020. While these policies create a strong enabling environment for circular business models, implementation remains uneven across regions due to differences in municipal capacity and infrastructure.

Extended producer responsibility

The most significant driver of South Africa's circular transition is the EPR regulations, which came into force in 2021. These regulations require producers to finance the end-of-life management of their products and packaging, fundamentally reshaping the economic incentives within the system.

As of the 2025 financial cycle, the system is operational across key material streams. For example, producers of PET beverage bottles are required to pay an EPR fee of approximately R773 per tonne to producer responsibility organisations (PROs) such as PETCO, while producers of rigid polyolefin plastics pay around R260 per tonne to Polyco PETCO, 2025; Polyco, 2025. These funds are ring-fenced and used to subsidise recycling infrastructure, stabilise secondary material markets, and support system innovation. Recent investments include large-scale bottle-to-bottle recycling capacity in the Western Cape.

Although the framework currently prioritises recycling, it creates economic incentives that could support reusable packaging and return systems. However, explicit mechanisms to prioritise reuse remain limited.

Informal sector integration: Waste Picker Integration Guideline (2020)

A unique and critical component of the South African context is the formal integration of the informal sector. The *Waste Picker Integration Guideline (2020)* recognises an estimated 60,000–90,000 informal reclaimers as essential service providers within the waste system. Informal reclaimers remain the backbone of the country's recycling system. Under the EPR framework, producer responsibility organisations are required to pay registered waste pickers a service fee for collection activities, separate from material value DFFE & DSI, 2020.

This mechanism aims to insulate the workers from global commodity price volatility, and improve collection efficiency and material recovery. It also provides a foundation for scaling reuse and refill systems by leveraging existing collection and distribution networks, although integration into formal systems remains uneven.

Industry collaboration and voluntary initiatives

Alongside regulatory developments, voluntary initiatives such as the South African Plastics Pact play a key role in driving industry collaboration. The pact brings together major brands, retailers, and stakeholders to accelerate progress towards circular packaging.

Recent progress reports indicate that members have achieved approximately 81% recyclability across their packaging portfolios, against a 2025 target of 100%. Significant progress has also been made in eliminating problematic formats such as PVC shrink sleeves and plastic barrier bags SA Plastics Pact, 2024. However, structural challenges remain. While the private sector continues to modernise, municipal waste systems face significant constraints. A 2024 assessment found that a large share of municipal landfills do not meet compliance standards, creating a “two-speed” system in which high-value circularity and private-sector innovation progress faster than public waste management DFFE, 2025.

4. Policy recommendations

Leveraging South Africa's existing circular economy infrastructure and industry collaboration can accelerate the scaling of refill systems. While refill practices already exist in returnable beverage packaging and informal retail, expanding these models across product categories will require stronger alignment between policy instruments, industry initiatives, and financing mechanisms. The following recommendations are based on an analysis of desk research and stakeholder engagement.

Clarify regulatory pathways for refill operations

Stakeholders highlighted the need for clearer guidance on how refill systems can operate safely within existing regulatory frameworks. Developing practical standards for dispensing systems, food-safe reuse, and liability allocation across producers and retailers could reduce uncertainty for businesses experimenting with refill models. Regulatory bodies such as the National Regulator for Compulsory Specifications (NRCS), together with the Department of Forestry, Fisheries and the Environment (DFFE) and the Department of Trade, Industry and Competition (DTIC), could play a role in ensuring that regulatory requirements support innovation while maintaining product safety and consumer protection.

Integrate reuse and refill within the EPR framework

South Africa's EPR regulations already require producers to finance packaging waste management and represent one of the country's strongest policy levers. However, current implementation remains largely focused on recycling outcomes. Integrating explicit reuse and refill targets within EPR schemes alongside differentiated fee structures that reward reusable packaging could redirect part of the existing financing towards prevention-based solutions. This would allow producer responsibility organisations to support refill infrastructure, reverse logistics systems, and pilot programmes that test scalable reuse models.

Use industry platforms to coordinate refill infrastructure

South Africa benefits from strong industry collaboration mechanisms, including the South African Plastics Pact and established producer responsibility organisations. These platforms could play a key role in coordinating refill pilots, developing shared infrastructure such as reverse logistics systems, and aligning actors around common operational standards. Multi-stakeholder collaboration could also support participation from smaller retailers and community-based outlets, such as spaza shops, helping refill models reach lower-income consumers and expand beyond niche urban markets.

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