

INNOPAY

A business of Oliver Wyman



ADOPTION PULSE - DPP IN THE NETHERLANDS

Digital Product Passport Festival 2025

9 October 2025

Mariane ter Veen, INNOPAY

TODAY'S TALKING POINTS



1

WHAT IS A DPP?

Product perspective

2

BUSINESS VALUE

Company perspective

3

ADOPTION & ECOSYSTEM INTERPLAY

Ecosystem perspective



AND... What do organisations tell us they need?

THERE IS NO SUCH THING AS “THE” DIGITAL PRODUCT PASSPORT

“We know DPP regulation is coming, but regulation is still indecisive... Timelines and guidelines for implementation are not clear”

“Requirements on what needs to be in a DPP can be influenced by what we as market frontrunners show is possible in our initiative”

“A DPP is nothing more than an ingredient list on the back of a pack of chocolate sprinkles and does not influence behaviour”



“DPPs enable consumers to make conscious choices when they make buying decisions”





OVERVIEW OF SAMPLE OF INTERVIEWED FRONTRUNNERS IN THE LANDSCAPE

Preliminary results

22

**INTERVIEWS
WITH ECOSYSTEM
REPRESENTATIVES**

50+

**Responsible economic
operators represented**

20+

**DPP service providers
represented**

10.000+

Suppliers represented

Sectors surveyed



Batteries



**Energy
related
products**



Iron & Steel



**Textile/
Apparel**



**Construction
products (Incl.
aluminium)**



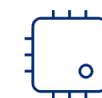
Mattresses



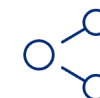
Aviation



Maritime



High-tech

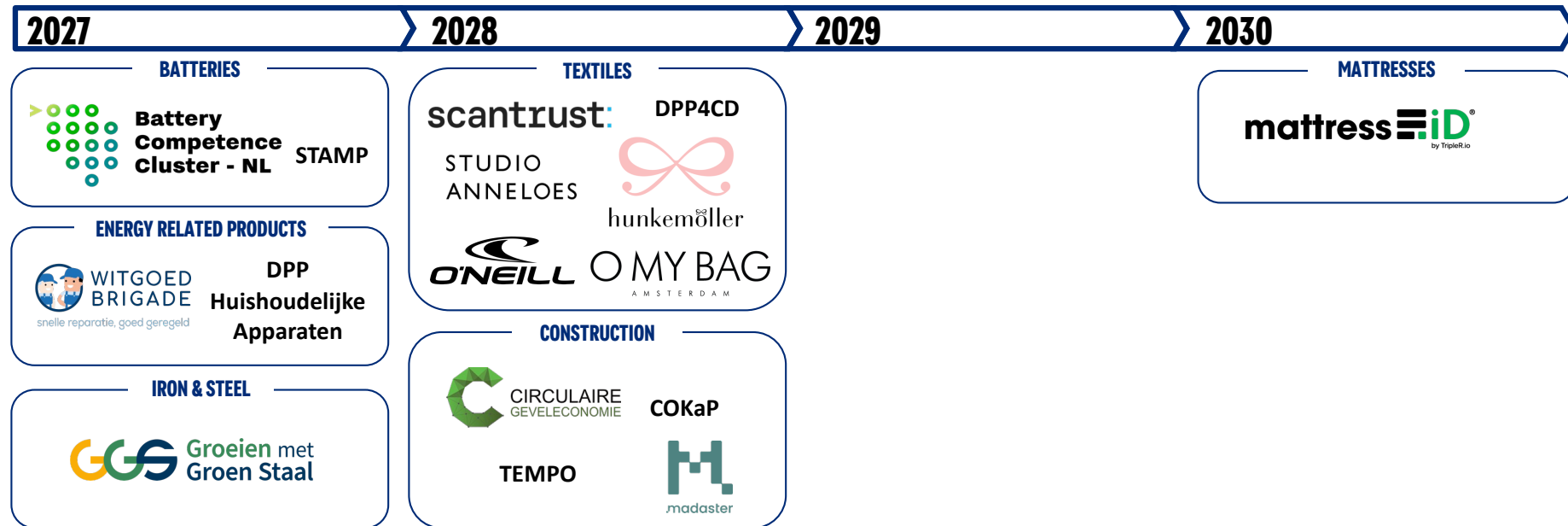


**Sector
agnostic**

INTERVIEWED DUTCH ECOSYSTEMS OPERATE IN SECTORS WITH AND WITHOUT A CONFIRMED EUROPEAN COMMISSION IMPLEMENTATION DEADLINES

DPP IMPLEMENTATION TIMELINE

Preliminary results



DPP INITIATIVES WITHOUT IMPLEMENTATION DEADLINES





Business value

ASPIRATIONS: INTERVIEWEES EXPECT DPPS TO GENERATE MANY BUSINESS BENEFITS - TRACEABILITY & REPORTING, INCREASED PRODUCT COLLECTION & INFORMED PURCHASING DECISIONS AS TOP MENTIONS

Preliminary results

Top 3 average score on perceived business benefits from DPPs from all interviewed organisations and ecosystems

4.6/5

TRACEABILITY AND (ESG) REPORTING

"It's great to bring that sustainability data to light for the DPP legislation, but also for **compliance to other reporting requirements**, such as for the CSRD, for example."

4.2/5

INCREASED FORMAL PRODUCT COLLECTION

"Collections could increase, certainly with the increase in related reward systems: every product will have very accurate information about materials, certificates, standards and recycling possibilities, **creating huge value for recyclers.**"

4.2/5

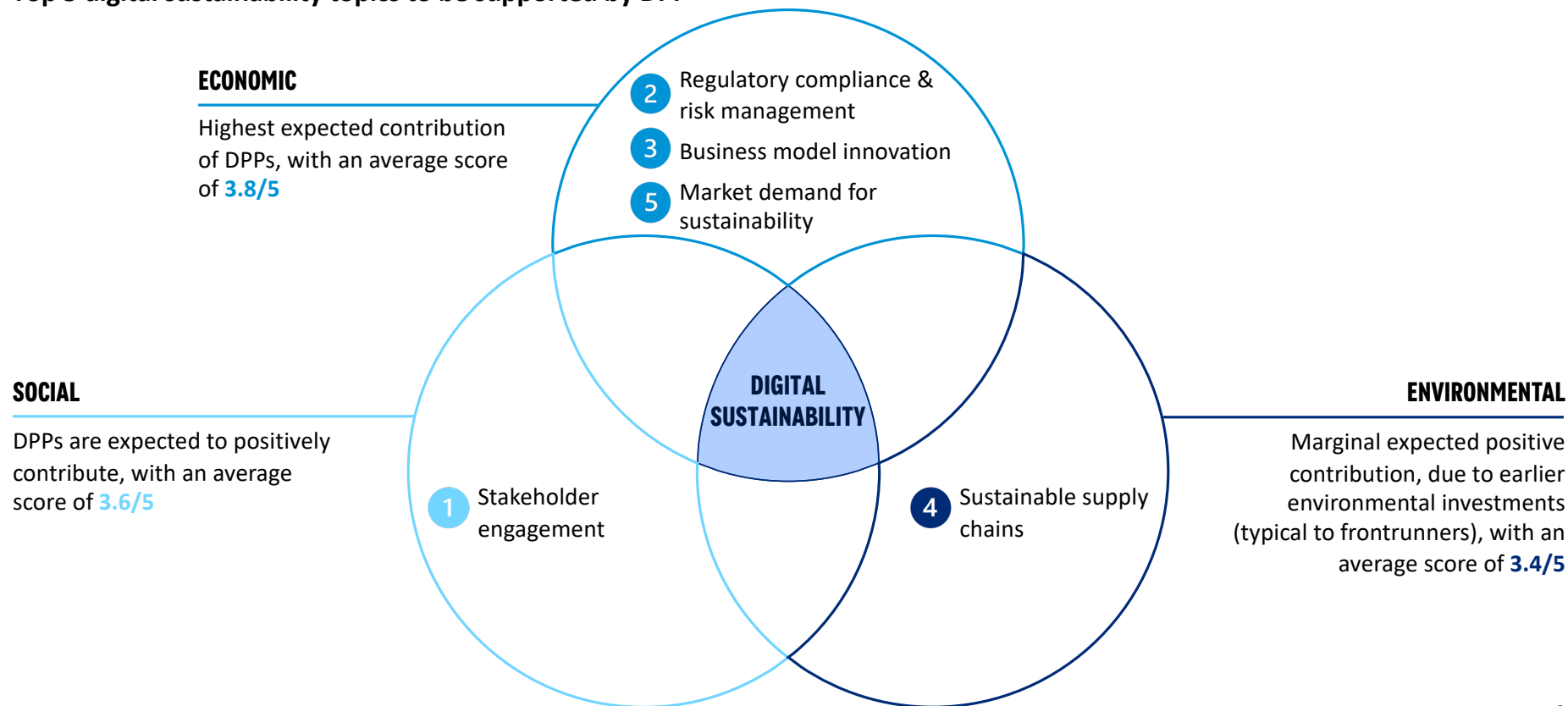
INFORMED PURCHASING DECISIONS

"I really hope that DPPs will have effect on market demand for sustainability: I'm pessimistic, but, at the same time, **the consumer is simply not yet accustomed to DPPs**"

DPPS ARE EXPECTED TO POSITIVELY CONTRIBUTE TO FRONTRUNNERS' DIGITAL SUSTAINABILITY IMPACT – WITH ECONOMICAL SUSTAINABILITY ELEMENTS SCORING HIGHEST

Preliminary results

Top 5 digital sustainability topics to be supported by DPP





Business value

INTERVIEWED ORGANISATIONS PERCEIVE THAT VALUE OF DPPS WILL GO BEYOND COMPLIANCE

Preliminary results

ALL INTERVIEWEES
CONSIDER COMPLIANCE AS ONE OF THE
MAIN INITIATORS OF DPP IMPLEMENTATION

AND



ALL EXCEPT ONE INTERVIEWEE
PERCEIVE DPP'S VALUE AS MORE THAN
JUST COMPLIANCE



Business value

INTERVIEWED ORGANISATIONS EXPECT DPPS TO HAVE A POSITIVE IMPACT ON FUTURE BUSINESS RESULTS

Preliminary results

NONE OF THE INTERVIEWEES
THINKS DPPS HAVE A POSITIVE IMPACT ON
ITS CURRENT BUSINESS RESULTS

BUT



>80% OF INTERVIEWEES
THINKS DPP'S IMPACT ON BUSINESS
RESULTS WILL TURN POSITIVE WITHIN 3
YEARS



Adoption

DPPS AND ADOPTION: OVERVIEW OF ECOSYSTEMS IN THE DUTCH LANDSCAPE WE INTERVIEWED SO FAR

Preliminary results

Stage of DPP development

The majority of the interviewed ecosystems has not implemented its DPP yet



Top 3 mentioned
SUCCESS DRIVERS
are collaboration, DPP
understanding & strategic value



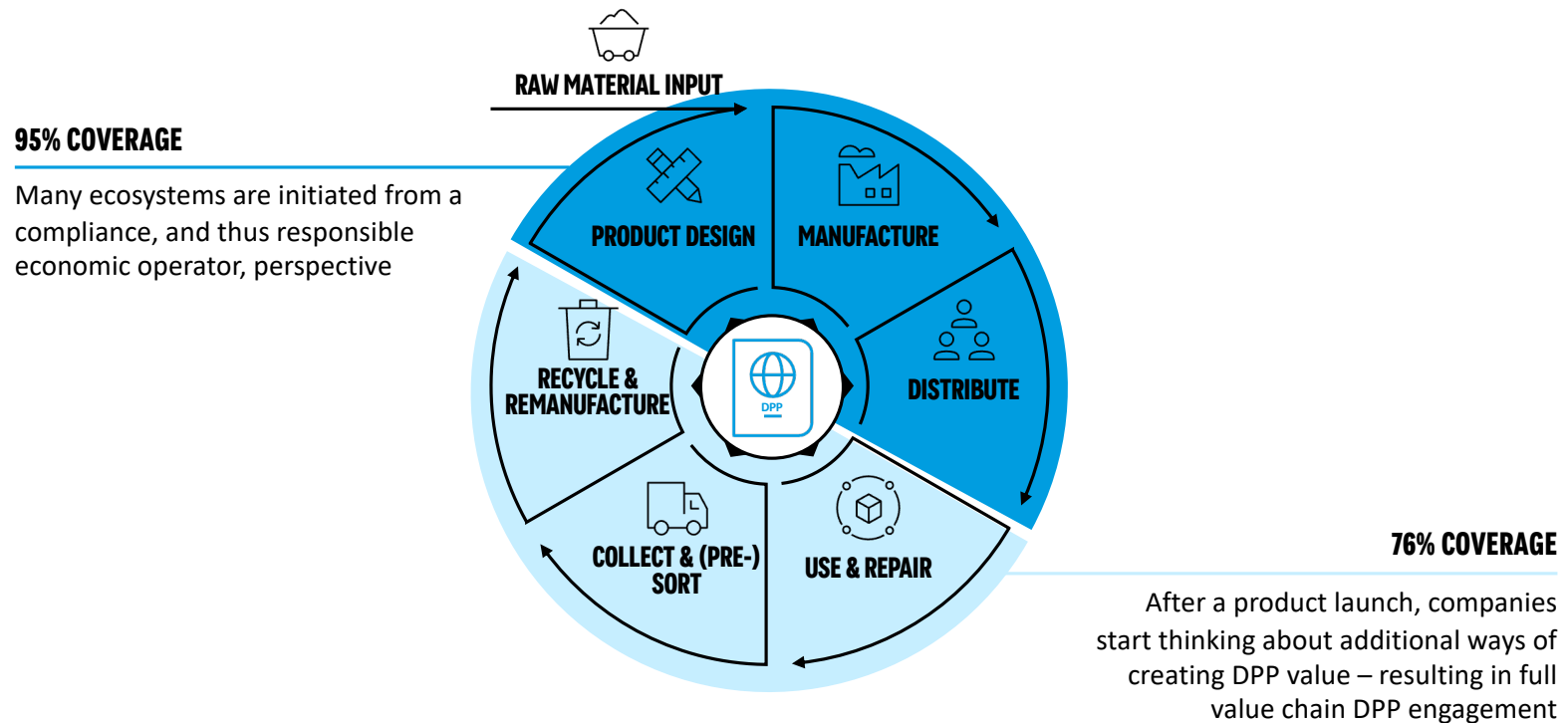
Top 3 mentioned
CHALLENGES
are lack of EU clarity, lack of
standardisation & DPP data gaps



INTERVIEWED ECOSYSTEMS VALUE FULL VALUE CHAIN COVERAGE FOR DPP IMPLEMENTATION, WITH MOST FOCUS PUT ON USING DPPS FOR PRODUCT DESIGN, MANUFACTURING & DISTRIBUTION

Preliminary results

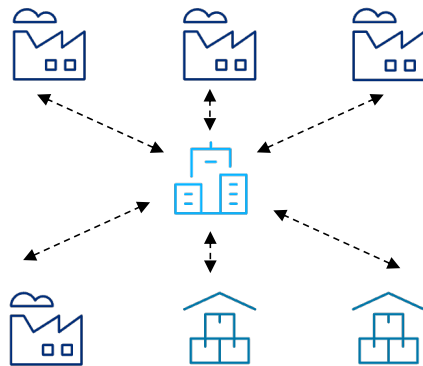
Percentage of interviewed ecosystems that cover each value chain stage in their DPP initiative





WE SEE THREE DIFFERENT STRATEGIES FOR REALISING DPP IMPLEMENTATION WITHIN THE DUTCH DPP LANDSCAPE

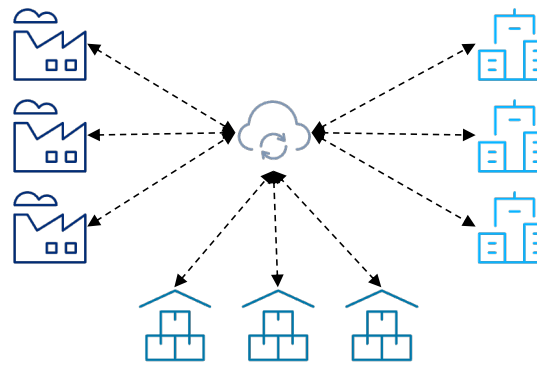
You are the DPP data orchestrator



Scope Individual value chains

Data access agreements Bilateral agreements

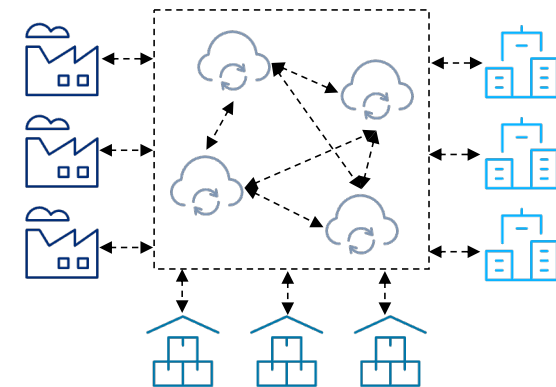
Platforms as DPP data orchestrator



Scope (cross-) Sector value chains

Data access agreements On platform terms

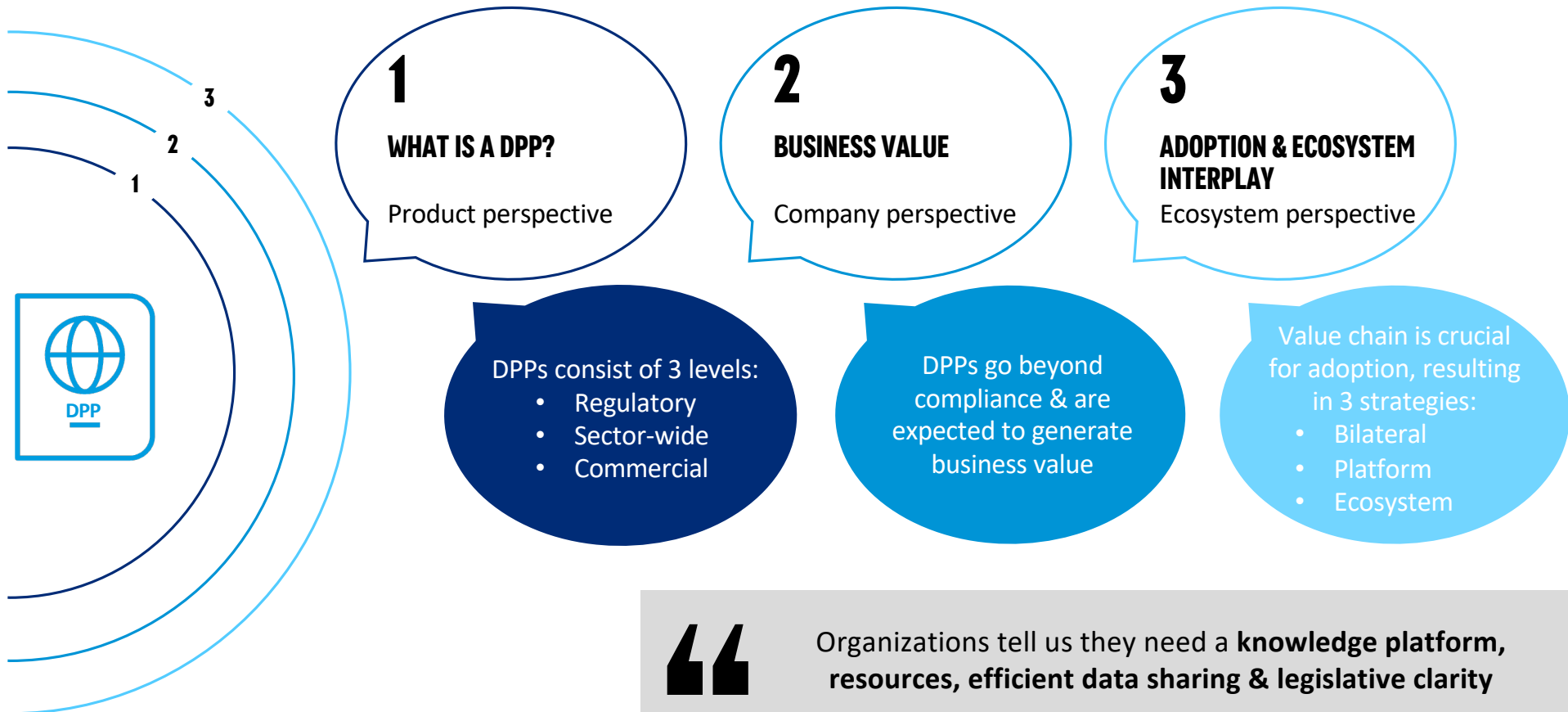
DPP data availability scheme



Scope (cross-) Sector value chains

Data access agreements Agreed upon by participants via scheme governance

KEY TAKE-AWAYS



THANK YOU!



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OUR RESEARCH**



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