




TOMRA

The revolution of circularity





**TOMRA** was founded on an innovation in **1972** that began with the design, manufacturing and sale of reverse vending machines (RVMs) for automated collection of used beverage containers. Today TOMRA provides **technology-led solutions** that enable the **circular economy with advanced collection and sorting systems** that optimize resource recovery and minimize waste in the food, recycling and mining industries.

**~5,400**  
employees  
globally



**1.273**  
Billion EURO  
revenues in 2023

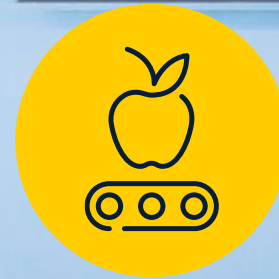
Publicly listed on Oslo Stock Exchange (OSEBX: TOM)



Collection



Recycling

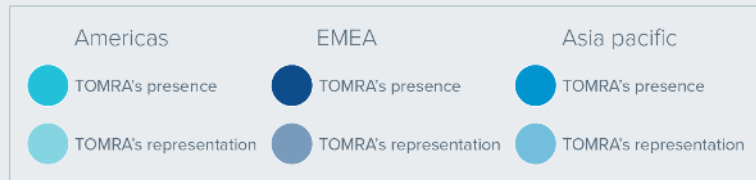
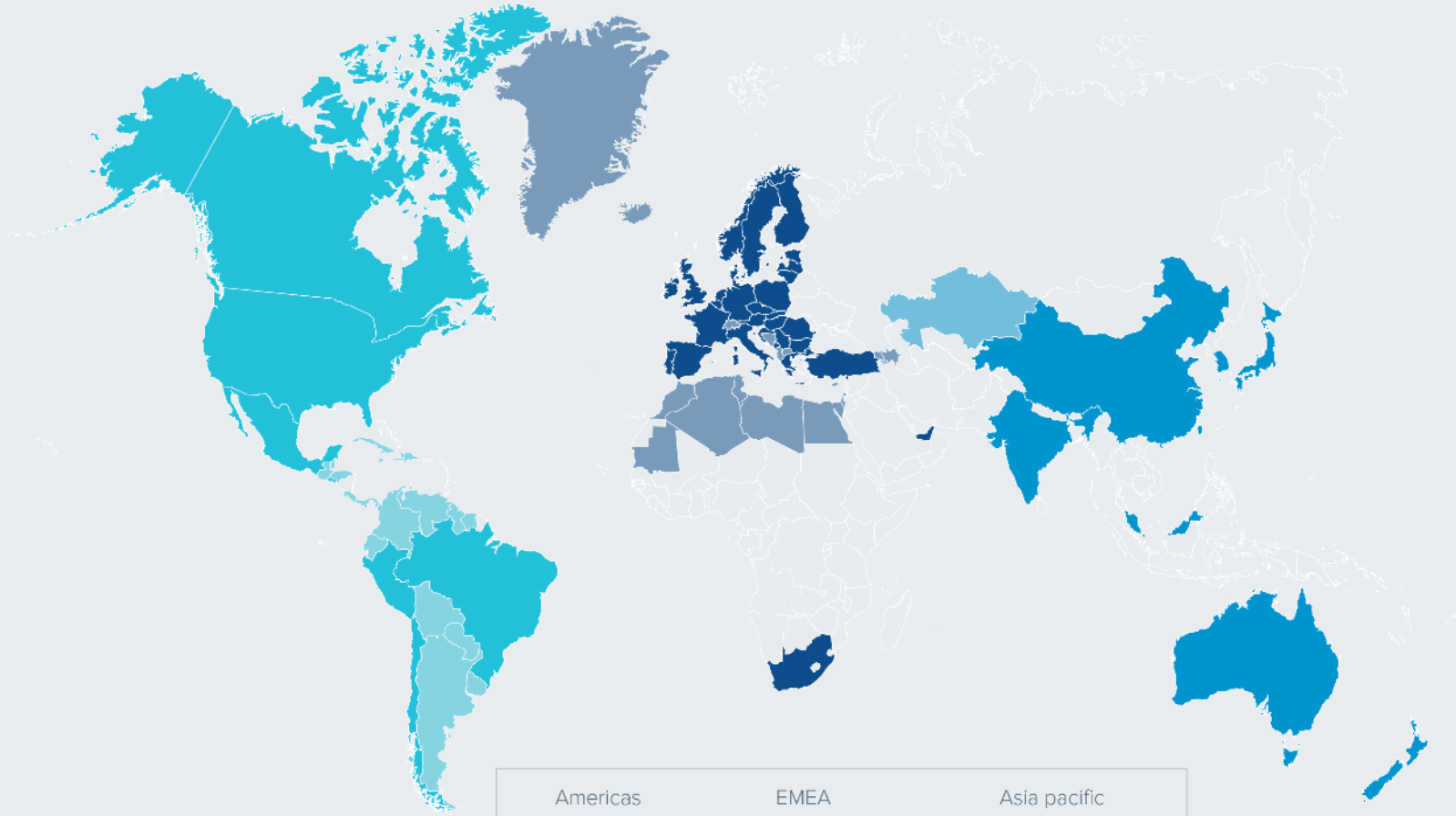


Food

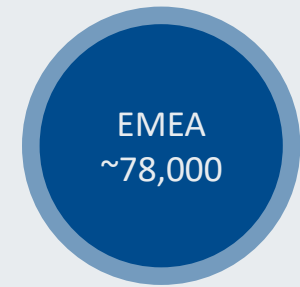


Horizon

# TOMRA's global presence



Installation base  
worldwide



Total ~110,000

\*All figures are from 2023



1.4 trillion  
beverage containers are  
used around the world  
each year



This represents a vast  
amount of material that  
can be collected and  
reused or recycled



- Today, only 2% of plastic packaging, or two out of 100 units, is recycled in a closed loop\*
- Too many bottles and cans end up in our streets, oceans and landfills

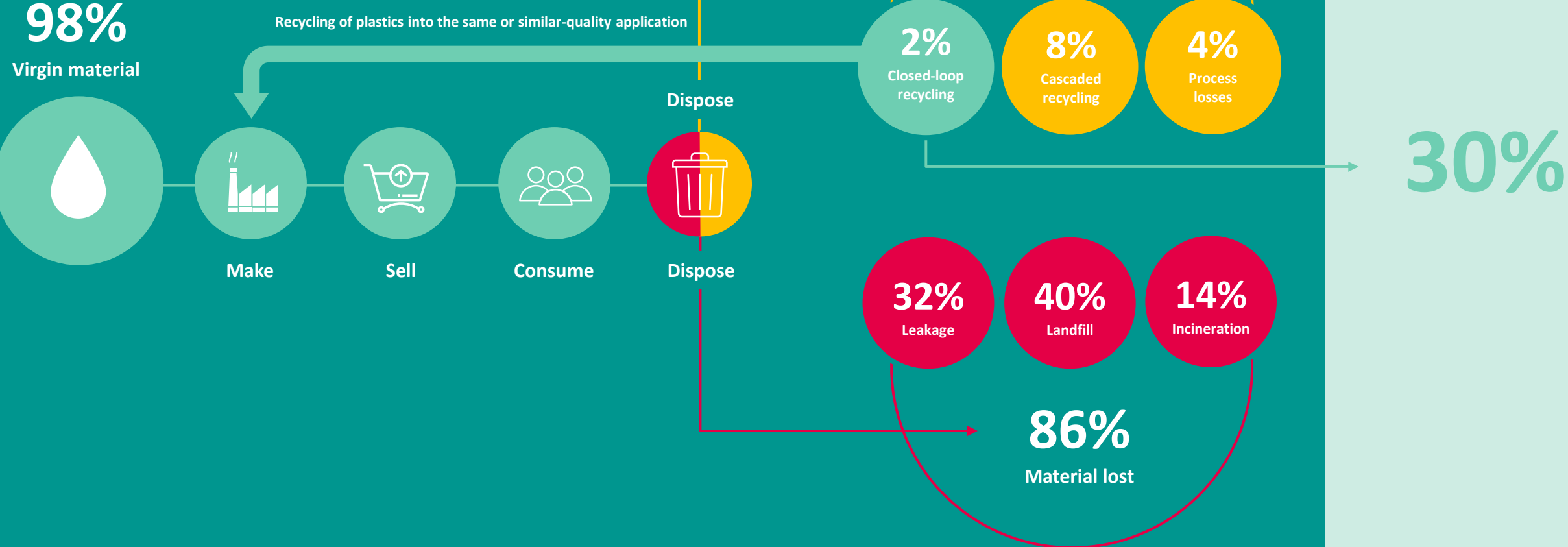
\* Source: Ellen MacArthur Foundation



# Today: post-consumer plastic packaging is treated linear instead of circular

Source: Ellen MacArthur Foundation

Our ambition by 2030:



# Our 2030 Sustainability Targets



Double the avoided emissions enabled by TOMRA products in use

Commitment to Net Zero emissions and setting Science Based Targets (to be externally verified by 2024)

100% renewable electricity

>80% reduction in operational transport emissions

>90% sustainable materials and components in all new products

>50% of our products are circular at their end of life

Strive for zero work-related injuries and illness in providing a safe place for people and the environment

Attract diverse talents from all facets of humanity, with a goal of 50% women and men joining annually

Grow female representation in senior management to >30%

Improve employee satisfaction and engagement with top quartile NPS Score

Supply Chain Sustainability targets will be announced in 2023



Resource Productivity



Climate Impact



Sustainable Product Design



Employee Value Proposition



Supply Chain Sustainability



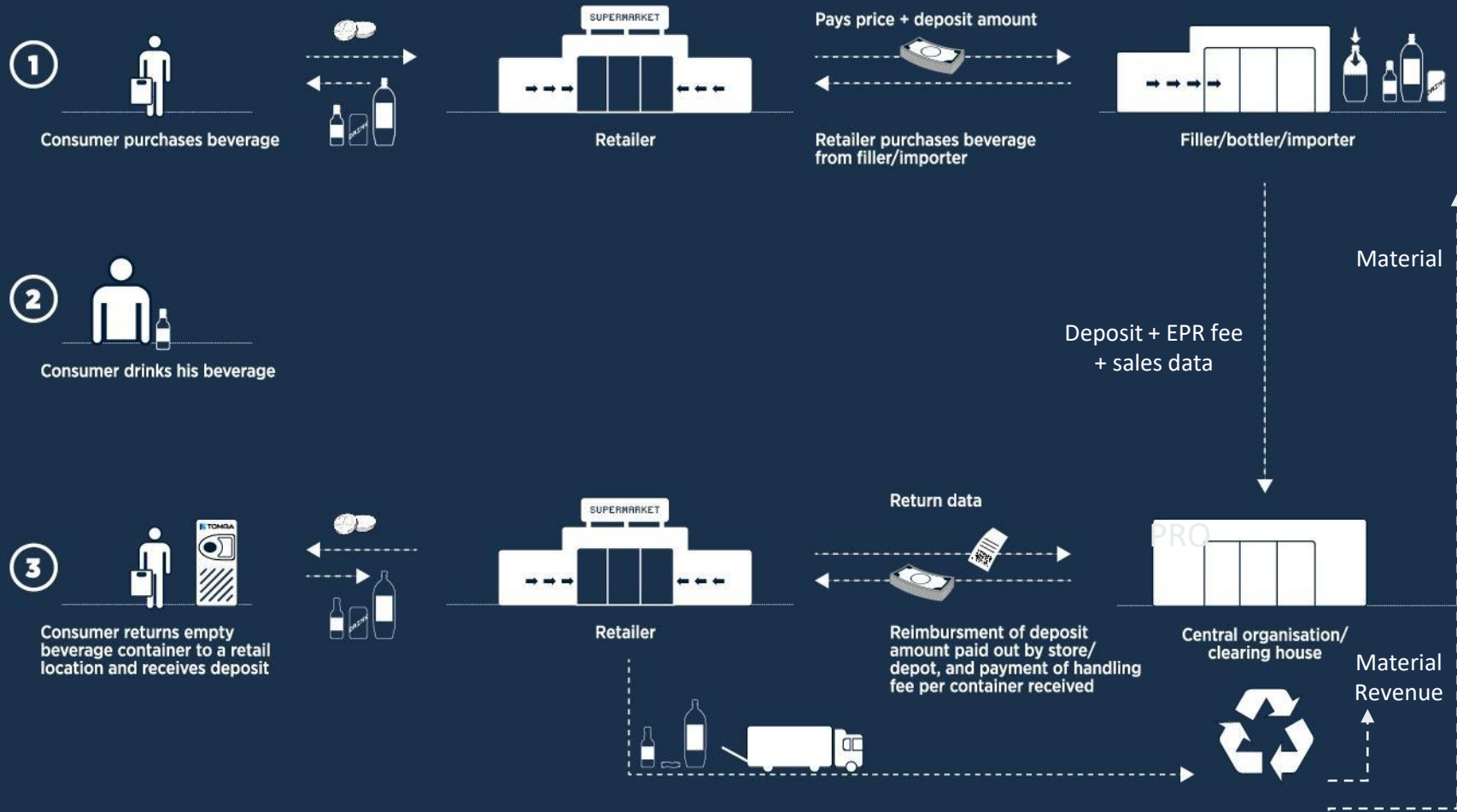
A blue-tinted photograph of a server room aisle. The perspective is looking down the center of the aisle, with rows of server racks on both sides. The racks are illuminated from above, creating a bright, glowing effect. In the foreground, centered in the aisle, is a large, circular, blue-tinted light fixture or lens. The overall atmosphere is clean, modern, and technological.

# UNDERSTANDING DEPOSIT RETURN SYSTEMS (DRS)



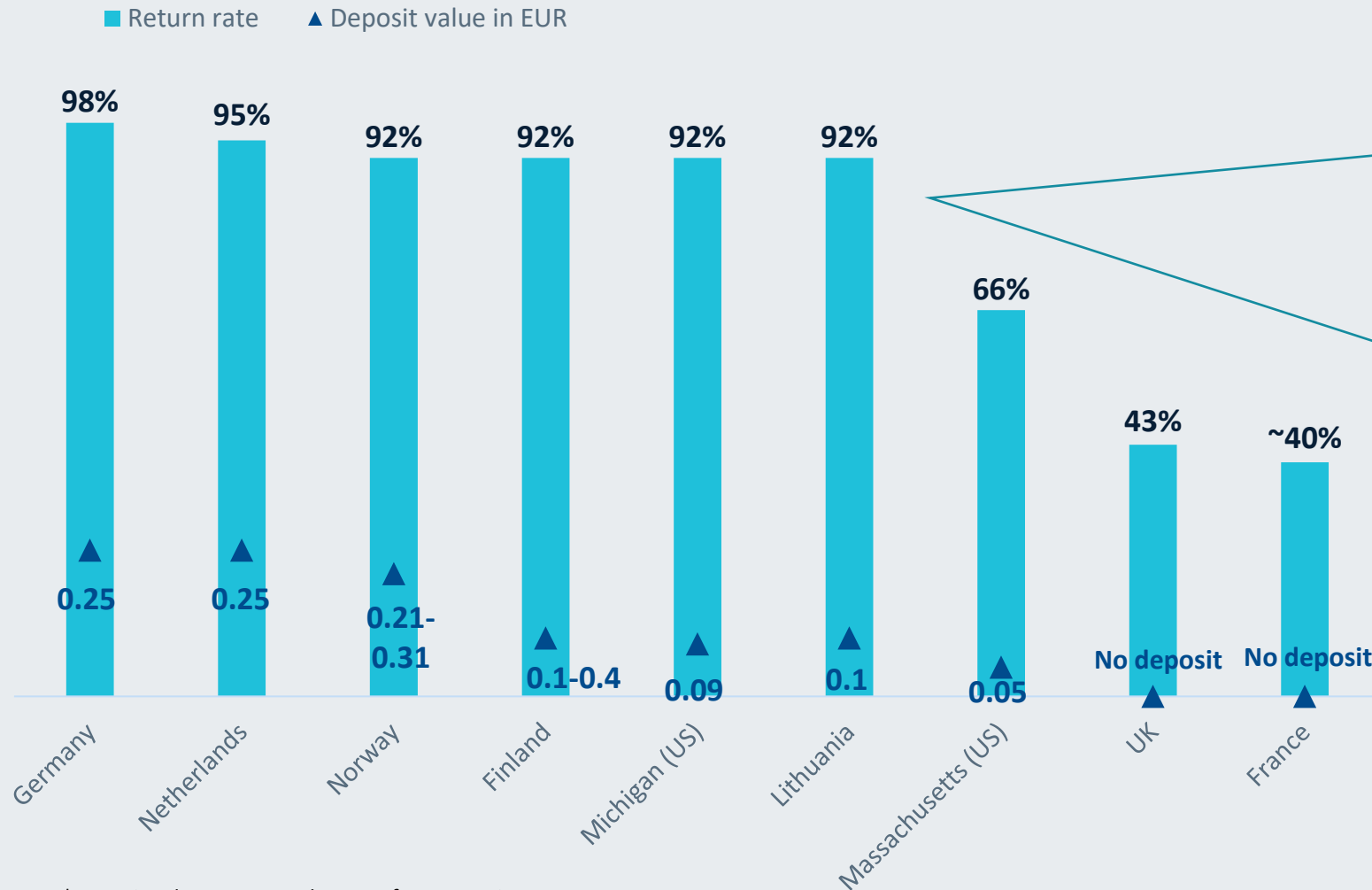




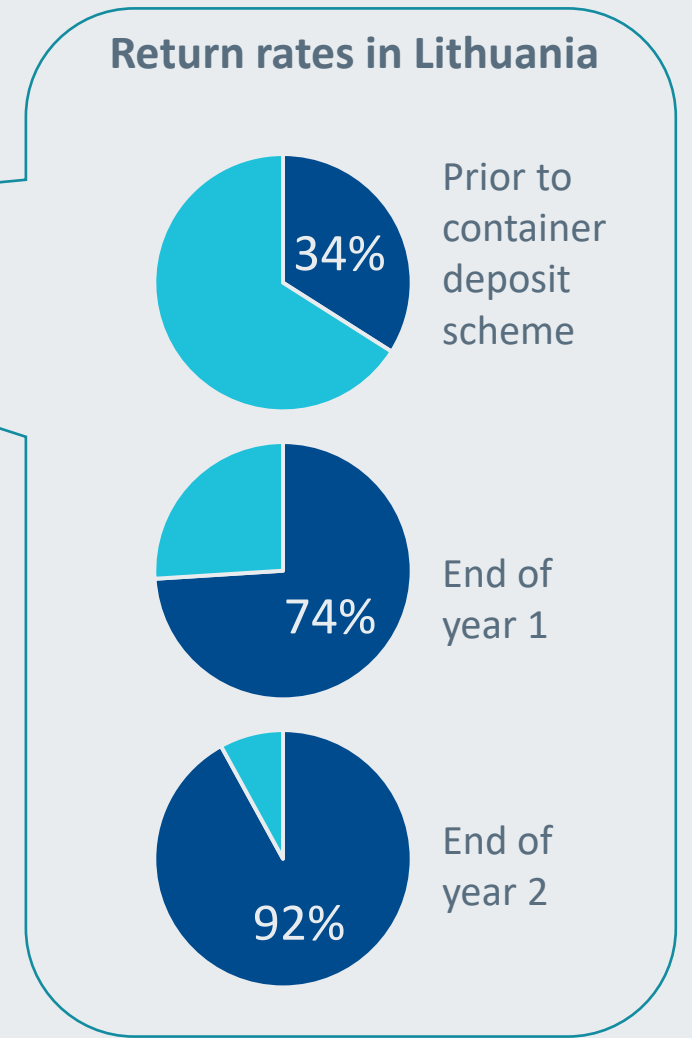




# High collection rates achieved in two years' time



\*Deposit values converted to EUR for comparison purpose



# What we've learned: High-performing deposit return systems prioritize four principles to frame their program

## Performance



A collection target for all beverages plus a meaningful deposit **delivers strong results.**

## Convenience



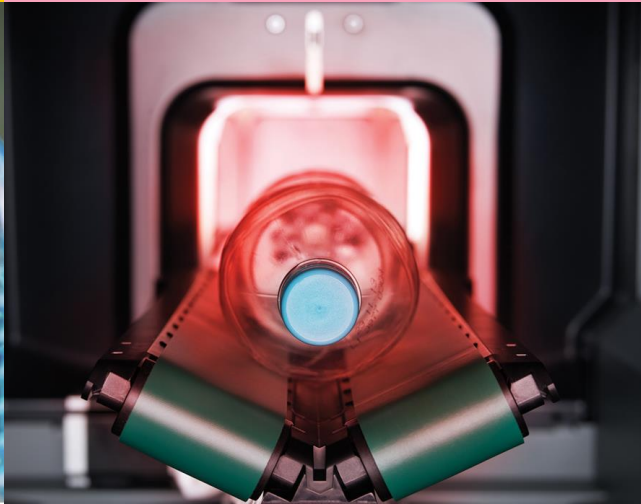
The redemption system is **easy, accessible and fair** for everyone.

## Producer responsibility



**Producers manage, finance and invest in the system** with the use of unredeemed deposits and commodity revenues.

## System integrity

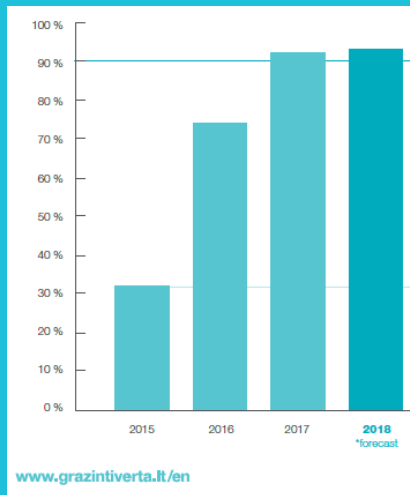


**Trust is built into the system's processes** through transparent management, a data-driven clearinghouse, and reliable redemption technology.



# What makes a deposit return system so attractive within the circular economy?

## 1. Maximizing high quality and quantity collection of used beverage containers



### The average collection rate in a DRS in Europe is > 90%

- Example Lithuania:
- 2015: < 33% collection for PET bottles
- 2016: 73,4% collection rate for PET bottles
- 2017: 90% collection rate for PET bottles

## 2. Maximizing high quality and quantity recycling of used beverage containers



### Construction of PET recycling plant in Norway to process 80% of domestic volume.

- Investor: Veolia PET DE
- Capacity: ~18.000t = > 80% of one-way PET bottles in the DRS
- Process: food grade PET pellets
- Investment: ~€21 mio.
- Aim: 80% rPET in every new PET bottle

## 3. Constant and stable supply of high quality secondary raw materials



### 2020: Coca-Cola Sweden to make all plastic bottles from recycled material

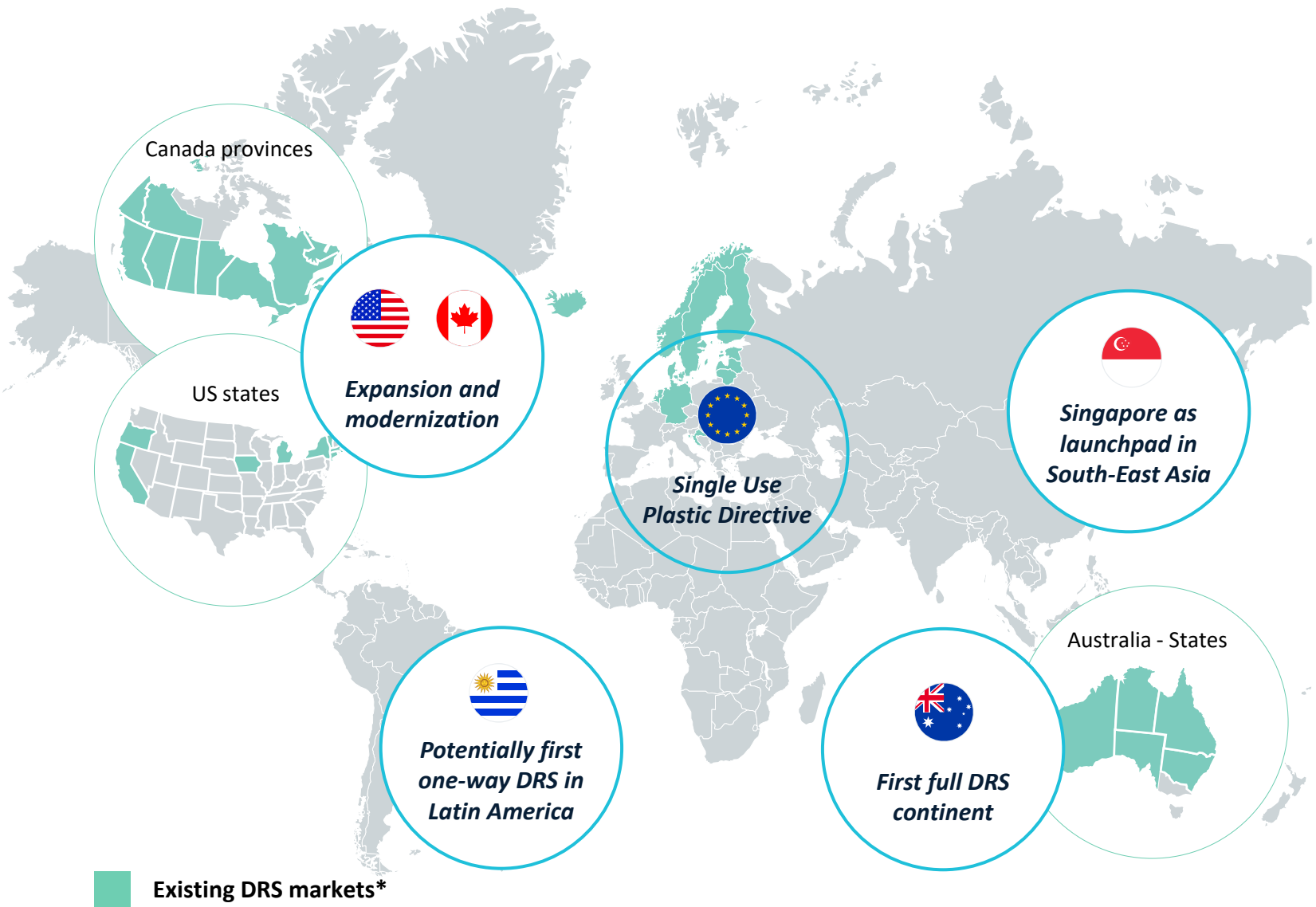
Returpak, is among the best in the world, and this played an instrumental role in Coca-Cola Sweden's decision to make the transition to 100% rPET in 2020

## 4. Litter reduction, particularly for beverages consumed on-the-go



The deposit system has led to a significantly higher recovery rate of metal and PET beverage containers. This improves the life cycle assessments of disposable beverage containers and prevents the blight of the landscape. This "Litterin" almost completely disappeared.

# Legislative outlook supports new and expanded Deposit Return Scheme (DRS) markets towards 2030



Existing DRS markets\*

\* In addition, some markets have refillable deposit systems such as: Austria, Belgium, Chile, Czech Republic, France, Hungary, Poland and South Korea



# Deposit Return Schemes Case Studies



	Norway	Lithuania	New South Wales
<b>Population / Area</b>	5.4 million / 385,207 km <sup>2</sup>	2.8 million / 65,300 km <sup>2</sup>	8.1 million / 809,952 km <sup>2</sup>
<b>Population density</b>	14.0 / km <sup>2</sup>	42.8 / km <sup>2</sup>	10.0 / km <sup>2</sup>
<b>Established</b>	1999	2016	2017
<b>System Operator</b>	<b>Infinitum</b> – owned by beverage producers and grocery chains	<b>USAD</b> – owned by breweries and trade associations	Scheme Co-ordinator: <b>Exchange for Change</b> (owned by 5 Australian beverage companies)  Network Operator: <b>TOMRA Cleanaway</b>
<b>Governance</b>	Voluntary response to Beverage Container Tax	Mandated by government regulation	Mandated by government regulation & appointed by Government tender

# Deposit Return Systems - Global development



# JEJU Vision: PLASTIC FREE 2040

## Vision for a Plastic-Free Jeju Island

- **Government Vision:** Jeju aims to become a leading example of a plastic-free environment in South Korea. This vision is driven by the need to manage the increasing plastic waste generated by both residents and the large number of tourists visiting the island.
- **Waste Reduction Efforts:** The local government has initiated several measures to reduce plastic waste. This includes banning disposable plastic bags, promoting the use of reusable containers, and encouraging businesses to adopt eco-friendly practices ([Korea Joongang Daily](#)).
- **Community Engagement:** The "Plastic Free Jeju" campaign has been active since 2019, involving the local community in activities like beach clean-ups and urban plogging. These efforts aim to change local mindsets and promote sustainable lifestyles ([Korea Joongang Daily](#)).
- **Commitment to Sustainability:** The Jeju government has pledged to continue supporting initiatives that reduce plastic waste and promote recycling. This includes expanding the DRS and other waste management programs to ensure long-term environmental sustainability ([Korea Joongang Daily](#)).

These ambitions clearly highlight Jeju Island's comprehensive approach to tackling plastic waste through community engagement, government support, and the possibility to undertake innovative and effective waste management systems like the DRS.



A futuristic hallway with a blue sphere in the center. The hallway is composed of multiple parallel tracks or lanes, creating a sense of depth and perspective. The walls and ceiling are made of a light blue, translucent material, and the floor is a darker blue. The lighting is soft and even, highlighting the metallic and glass-like textures of the environment. In the center of the hallway, a large, glowing blue sphere is mounted on a thin black rod. The sphere has a circular opening in its center, revealing a darker blue interior. The overall aesthetic is clean, modern, and high-tech.

# DRS CONCEPT

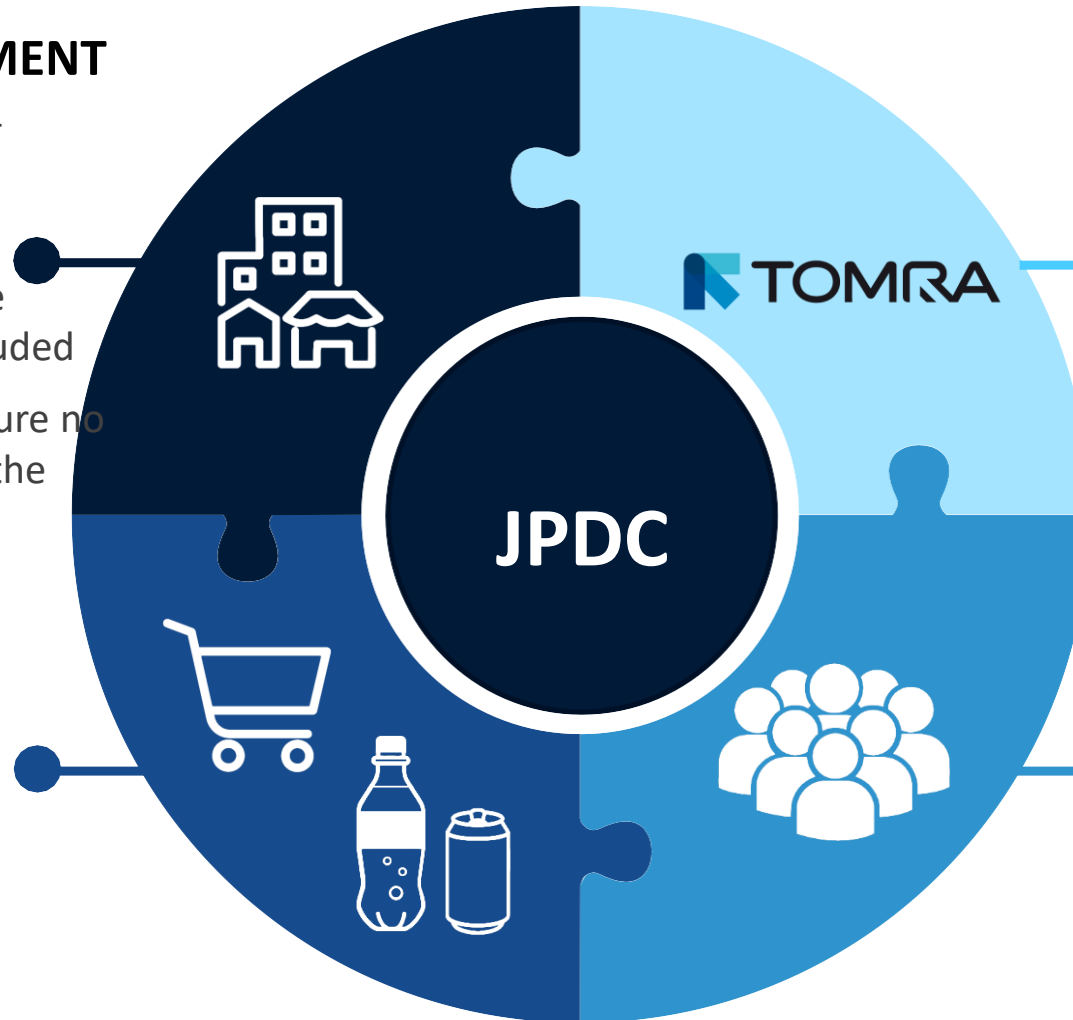
# Concept & Design – Critical Success Factors For The Trial

## CONTROLLED ENVIRONMENT

- Distinctly different from non-DRS environment to test consumers' behaviours
- Special label to communicate beverage has a deposit included
- Closed and controlled to ensure no compromise is created with the system

## PRODUCERS & RETAILERS

- High level of cooperation from on-site retailers
- Retailers label and sell with deposit



## INFRASTRUCTURE & TECHNOLOGY

- Knowledge sharing across all stakeholders, Key design principles
- Basic assessment and recommendations
- Support with the design proposal
- Leveraging expertise in collection points design & operation management
- Cost efficient & robust Reverse Vending collection technologies
- High Collection Rate

## CONSUMERS

- Education & outreach critical to secure support from consumers
- Consumer must be aware that a deposit is included for pilot to work
- Communication and feedback through RVM app

A person stands on a rocky mountain peak, looking out over a valley. A small pond is visible on the right side of the peak. The background shows a valley with a river and mountains under a blue sky with some clouds.

**At TOMRA, our vision is to Lead the Resource Revolution.**

It is our belief that businesses have the power and responsibility to help manage our planet's precious resources - today and tomorrow.