

Updates Central-Eastern European countries

>5,000 >100,000 1.3 >100 TOMRA employees globally Installations globally Markets served billion EUR revenues in 2023 Publicly listed on Oslo Stock Exchange (OSEBX: TOM) 000 Collection Recycling Food Horizon

TOMRA's global presence



Installed base ~110,200



Collection ~85,000



Recycling ~10,200



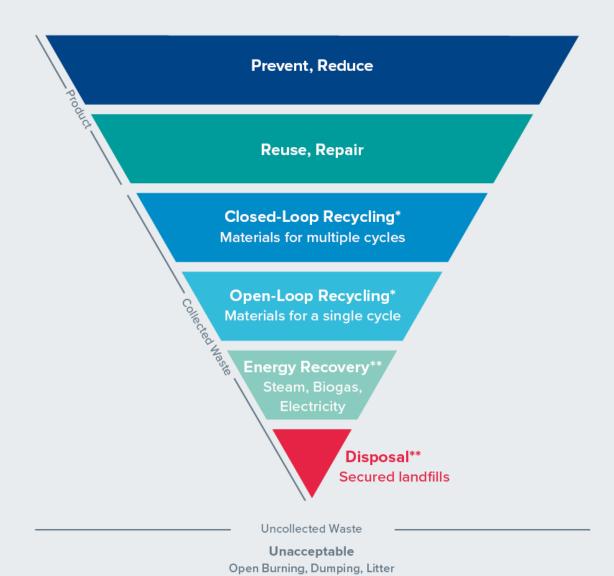
Food ~15,000







TOMRA's Resource Hierarchy

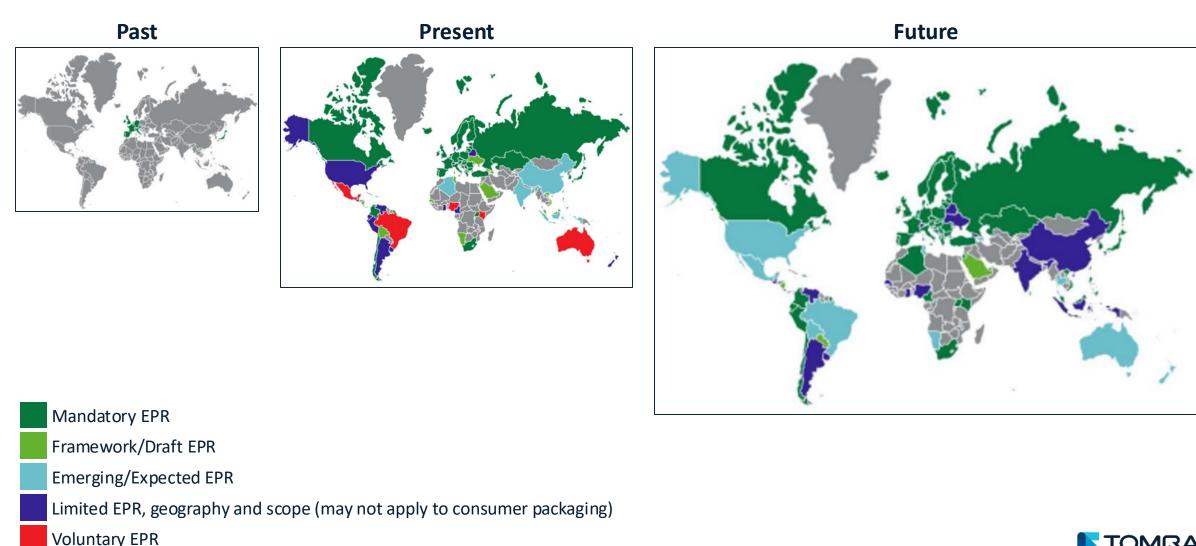




^{*} Mechanical recycling preferred

^{**} Additional sorting recommended

Mandatory EPR for packaging is a proven framework



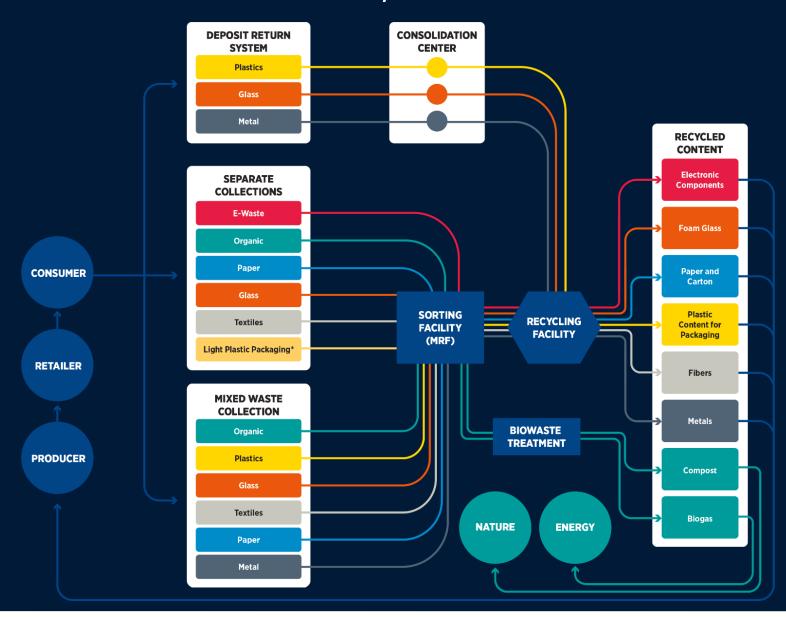
Important elements of Holistic Resource Systems (HRS)



Holistic Resource System white paper



Holistic Resource Systems | Flowchart



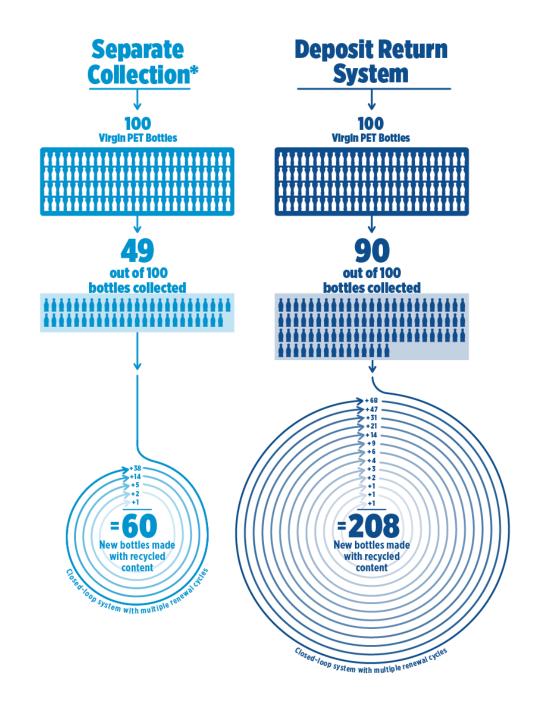


Deposit Return System

PET, metal and sometimes, glass

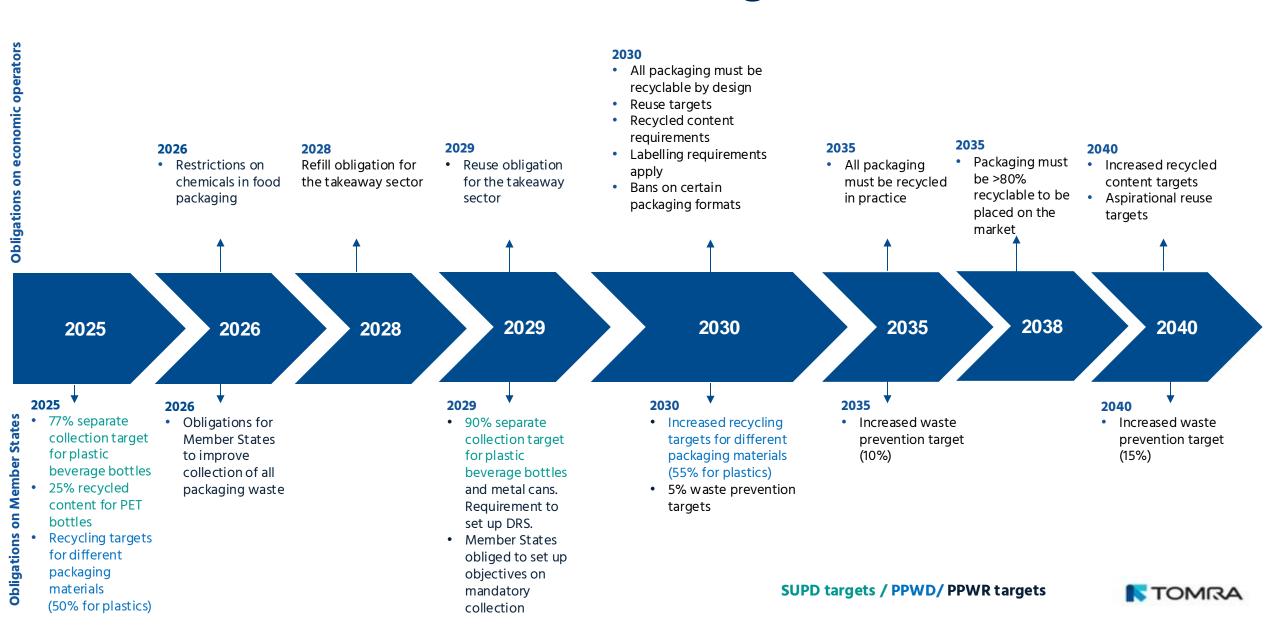
Delivers: average of 90% collection rates and highest recycling content possible

Significantly reduces litter





PPWR - new obligations



90% separate collection + DRS

- By 1st Jan 2029
- For single-use plastic beverage bottles and metal cans <3L
 - Exemption for milk and wine > Member
 States may include them
 - Glass and beverage cartons > Member
 States shall endeavour to include them
- Systems to meet minimum design criteria
 - Single, non-profit operator; or coordination in case of multiple
 - Minimum deposit level
 - Take-back obligation of distributors
 - % revenues for communication
 - •

- Drive DRS performance
- Tool for industry to achieve legislated targets and voluntary commitments

Recycled content targets

 Building on the Single-use Plastics Directive (SUPD)



- DRS may provide fair access to recycled materials
 - At market prices
 - Amount corresponding to packaging placed on the market

DRS able to provide high-quality and stable material supply according to food safety standards

Deposit Return Systems Europe

Existing - Expanding (Fractions / Contents / Deposit amount) - 1984 (Metal) - 1994 (Plastic) Sweden Iceland - 1989 (Plastic / Metal / Glass) **Finland** - 1996 (Metal) - 2008 (Plastic) - 2011 (Glass) - 1999 (Plastic / Metal) - 2017 (deposit) Norway Denmark - 2003 (Plastic / Metal / Glass) - 2020 (Juice) - 2003 (Plastic / Metal / Glass) - 2022 (Juice) - 2024 (Milk) Germany 16 Estonia - 2005 (Plastic / Metal / Glass) - 2015 (deposit) Netherlands -2005 (Plastic > 1l) -2021 (Plastic < 1l) -2023 (Metal) - 2006 (Plastic / Metal / Glass) - 2020 (Milk) Croatia Lithuania - 2016 (Plastic / Metal / Glass) Slovakia - 2022 (Plastic / Metal) - 2022 (Plastic / Metal / Glass) - 2023 (syrup and alcoholic cocktails Latvia (with an alcohol content of up to 15%) in glass, plastic (PET) and can packages, all types of alcoholic beverages in plastic (PET)/cans Malta - 2022 (Plastic / Metal / Glass) Romania – 2023 (Plastic / Metal / Glass) - 2024 (Plastic/ Metal / Glass) Hungary - 2024 (Plastic / Metal) Ireland



DEPOSIT RETURN SYSTEMS EUROPE



Political decision taken – Greenfield countries

2025:

Austria – (Plastic / Metal)
Poland – (Plastic / Metal)
Greece – (Plastic / Metal / Glass?)

2026:

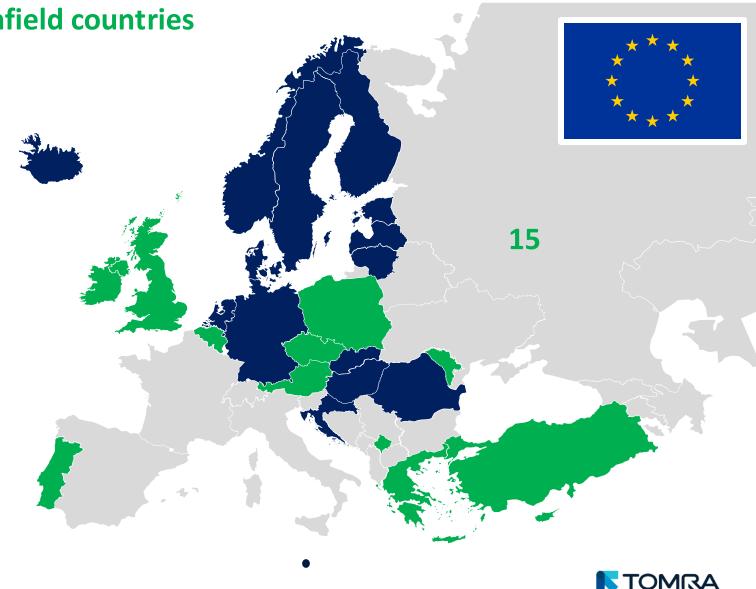
Portugal – (Plastic / Metal / Glass) Czechia – (Plastic / Metal)

2027:

England – (Plastic / Metal)
Wales – (Plastic / Metal / Glass)
Northern Ireland – (Plastic / Metal)
Scotland – (Plastic / Metal / Glass*)
Moldova – (Plastic / Metal / Glass)

TBD:

Cyprus – (Plastic / Metal / Glass)
Belgium – (t.b.d.)
Turkey – (Plastic / Metal / Glass)
Kosovo – (Plastic / Metal / Glass)
Slovenia – (t.b.d.)



DEPOSIT RETURN SYSTEMS EUROPE



DRS discussion

Albania

Bosnia Herzegovina

Bulgaria

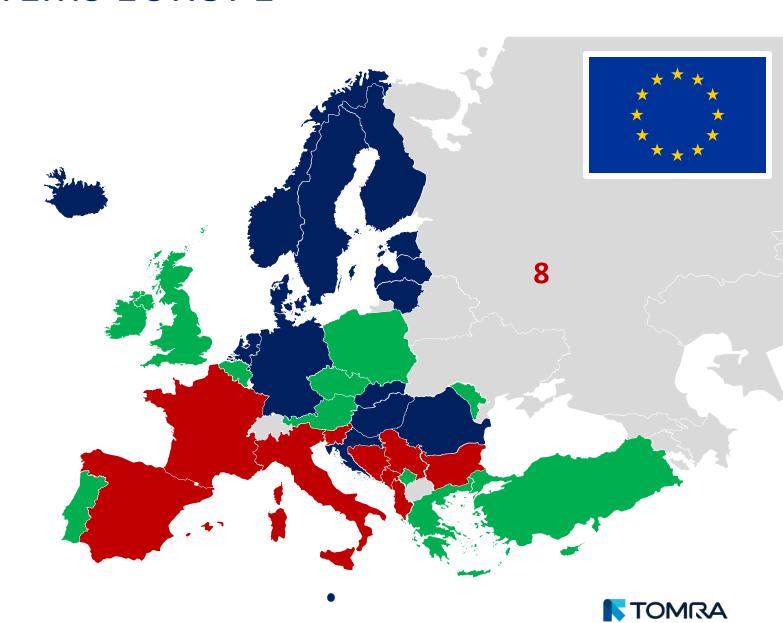
France

Italy

Montenegro

Serbia (2027)

Spain



Long-term vision 2030

All EU Member-States + UK + Turkey have a DRS in place.





Collection rates in newest DRS markets



January 1, 2022

Latvia

February 1, 2022



November 14, 2022

Collection rates

2022 71%

2023 92%

Collection rates

2022 & 2023

average 80%

Collection rates

2023 80%



DRS in Romania, RetuRO - 10 months

Yearly Volume

7 bln containers plastic, metal, glass

Collected

2.3 bln in 10 months

Return rate

78% in August 81% in September

Recycled so far

137 000 tons

Operations

7 out of 10 Counting and sorting centers

Organization

800 employees

Registration

39 000 Retailers 1 500 producers Contract signed

Packaging Register

50 000 SKU's registered

RVMs

~5000

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98% consumers awareness 75% - DRS best solution 57% - return constantly

9 out of 10 returned at least once

Consumer Response

6 out of 10 – return constantly











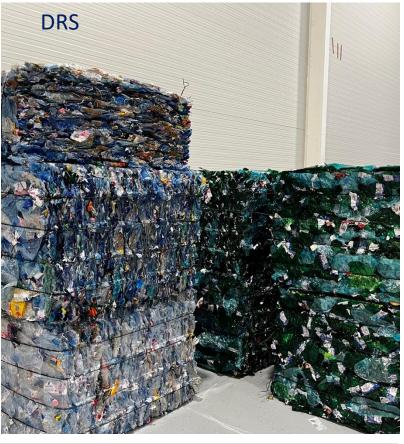


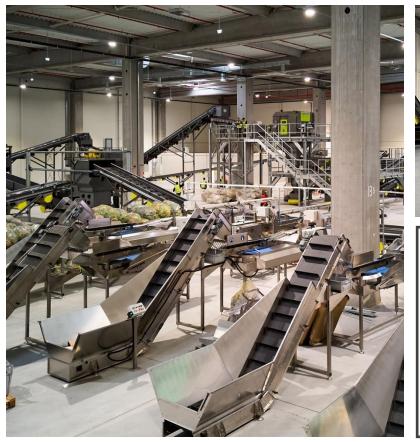
Retail return infrastructure





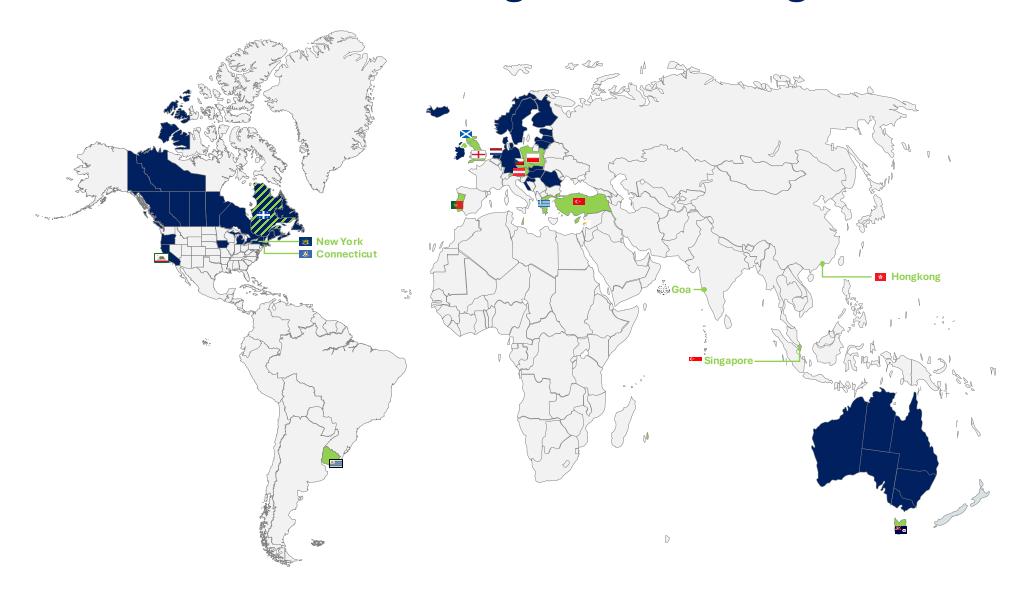






From waste to resource

Global overview – DRS for single-use beverage containers





Al/Deep Learning for Sensor-Based Sorting

Combination with state-ofthe-art NIR-VIS technology

Boosting circularity with new applications:

- PET food vs. non-food
- HDPE food vs. non-food
- PP food vs. non-food
- Etc.

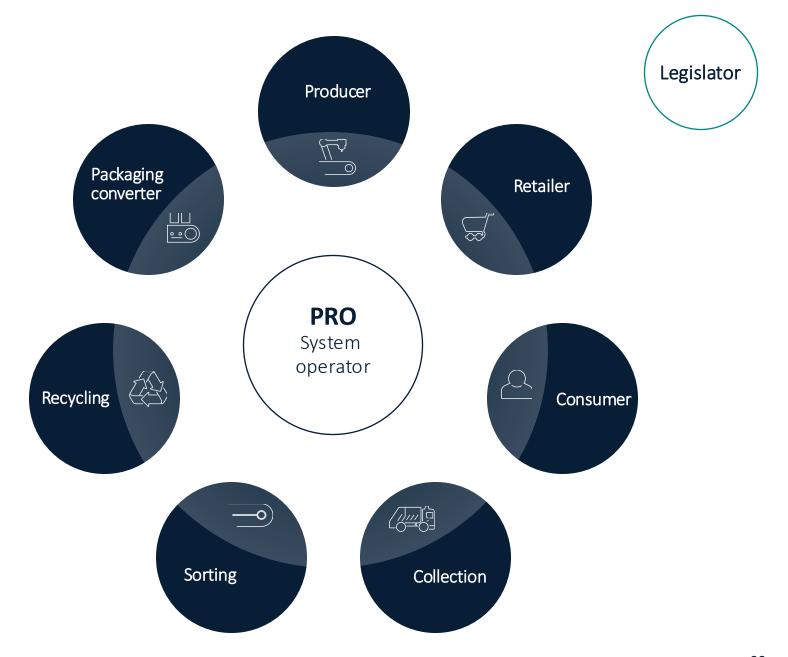






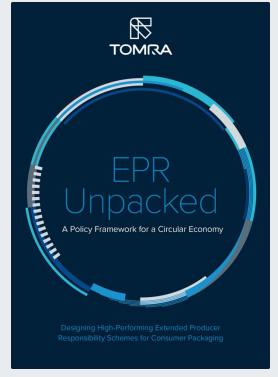


The EPR ecosystem



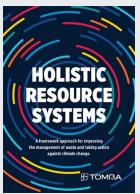
TOMRA's five decades of experience showcased in our white paper series on EPR

2022



Additional White Papers...And more to come









Rewarding Recycling

Learnings from the World's Highest-

2021





Thank you!



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