



TOMRA

Enhancing the Circularity of Plastic Beverage Packaging: Learnings from the World's Highest-Performing Deposit Return Systems

Plastainability 2024

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Athens

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Putting
recycling to
work since
1972

Tore and Petter
Planke invented the
first fully-automated
reverse vending
machine

~5,400
employees
globally



14.8
billion NOK
revenues in 2023
(~ 1.27 mld EUR)

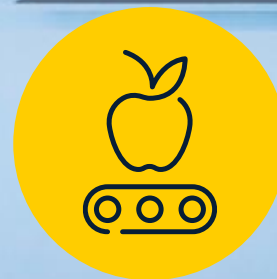
Publicly listed on Oslo Stock Exchange (OSEBX: TOM)



Collection



Recycling



Food



Horizon

TOMRA Collection

Transforming society's habits to keep valuable resources in a continuous loop of use and reuse.



~532mIn
EUR
in revenue



85,000+
machines in
operation



Represented in
60 countries



We are a technology
leader globally

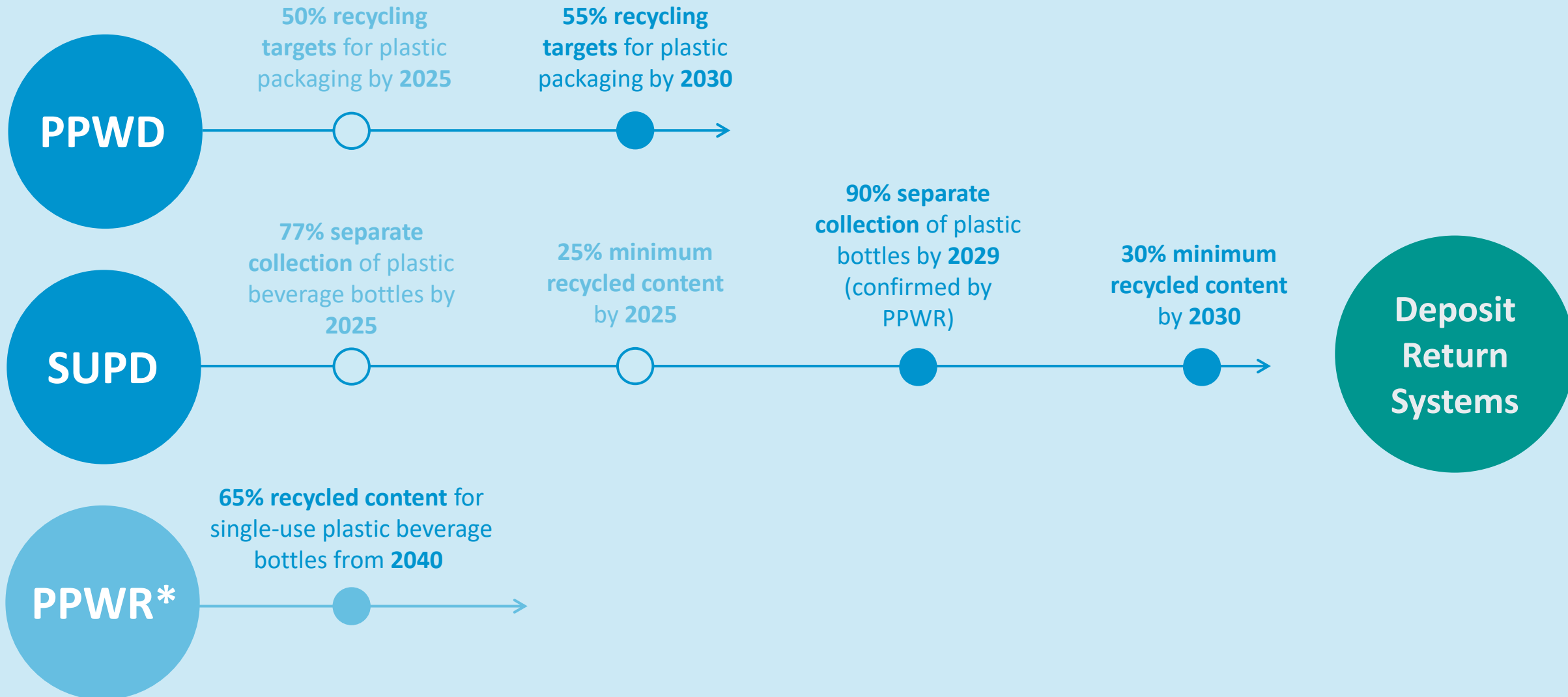
Collecting
45+ billion
containers a year



TOMRA in Greece

- Active since the late 90s
- 268 RVMs operational
- June 2024 opened office in Acharnes

Relevant European targets for plastic packaging



*As per text voted by the European Parliament in April 2024

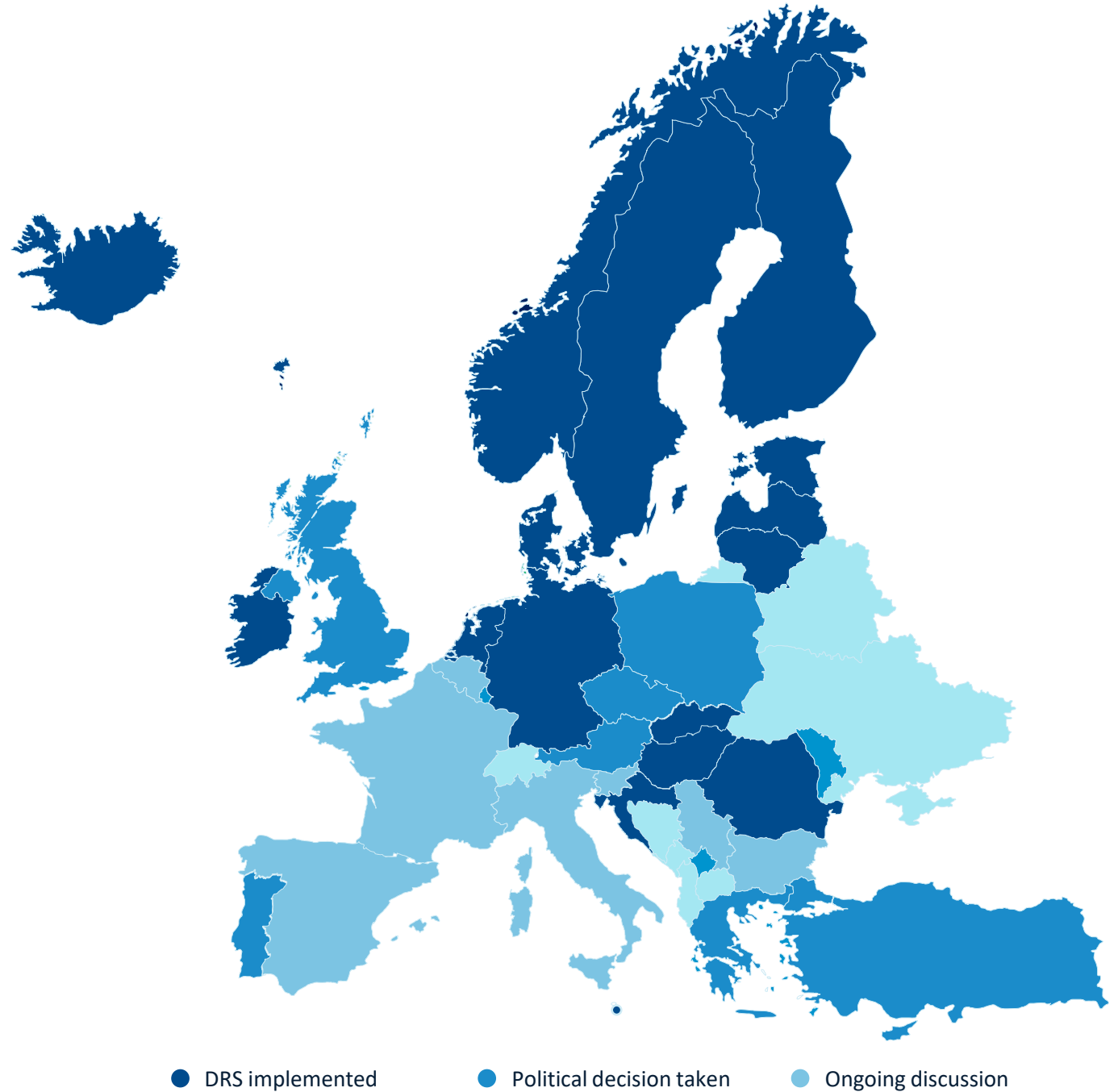
- DRS is an **increasing trend globally** to drive the circularity of packaging
- EU's PPWR recognises DRS as a mainstream system for single-use beverage packaging and provides the framework to drive **performance towards 90% separate collection until 2029 (Art. 50)**
- This will help the industry achieve **legislated targets and broader circular economy strategies**



DRS

European overview

Sweden (1984, 1994*, 2023*)	Austria (2025)	Bulgaria
Iceland (1989)	Poland (2025)	France
Finland (1996, 2008*, 2012*)	Greece (2025)	Italy
Norway (1999, 2018*)	Türkiye (2025)	Slovenia
Denmark (2002, 2020*)	Portugal (2026)	Spain
Germany (2003, 2022*, 2024*)	Czechia (2026)	Serbia
Netherlands (2005, 2021*, 2023*)	United Kingdom (2027)	Belgium
Estonia (2005, 2015*)	Luxembourg	
Croatia (2006, 2020*)	Cyprus	
Lithuania (2016)	Kosovo*	
Malta (2022)	Moldova	
Latvia (2022)		
Slovakia (2022)		
Romania (2023)		
Hungary (2024)		
Ireland (2024)		



The benefits of deposit return systems

What makes these systems so attractive as part of the transition to a circular economy?



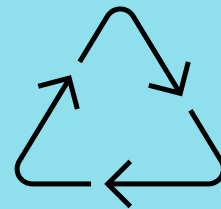
Collection rates

The average collection rate in European systems is **91%**



High quality recycling

Allows «bottle-to-bottle» recycling



Post consumer material

Consistent and stable input of high-quality secondary raw materials

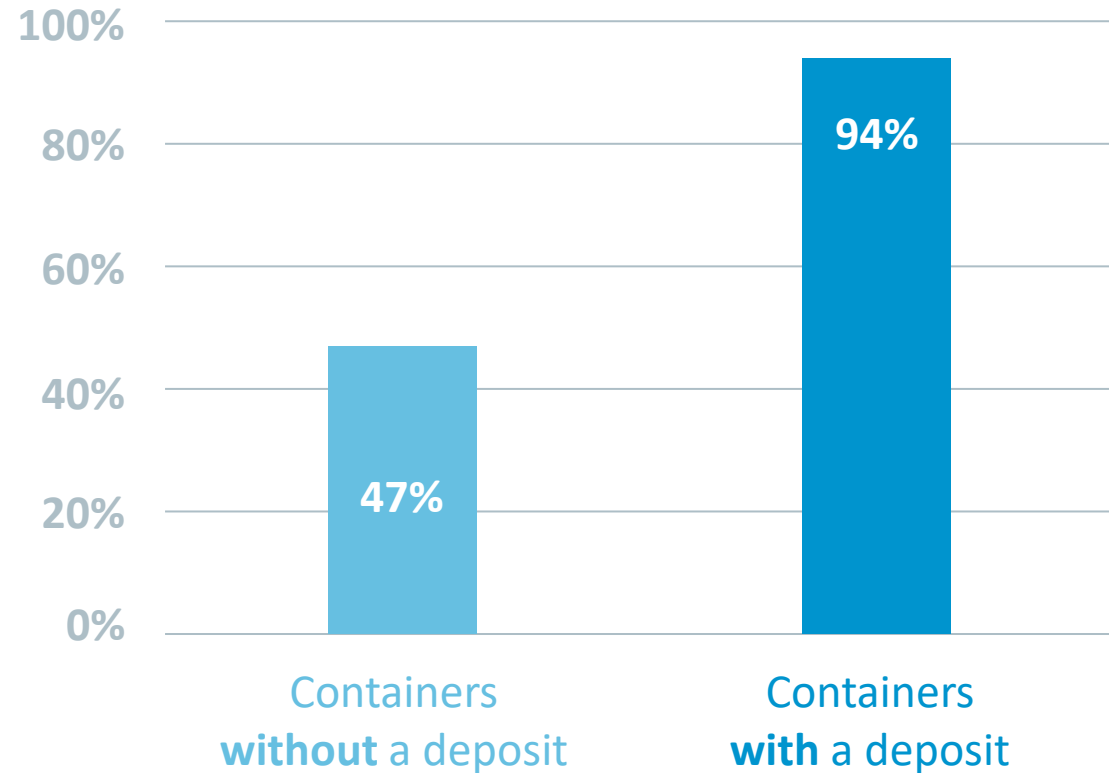


Litter prevention

Immediate effects in reducing littering, targets out-of-home consumption

Deposit return systems are extremely effective at capturing items for recycling

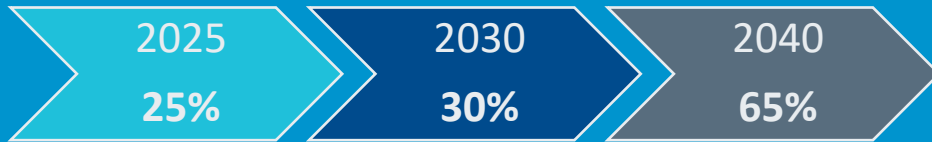
PET Plastic Beverage Container Collection for Recycling Rates – Europe Average



Compiled from deposit System Operators and "PET Market in Europe: State of Play," Eunomia. 2020. Data available upon request.

Recycled content targets

- Building on the Single-use Plastics Directive (SUPD)



- Compliance to be demonstrated by economic operators
- DRS may provide prior and 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



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

Download our
DRS white paper



Performance



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

Convenience



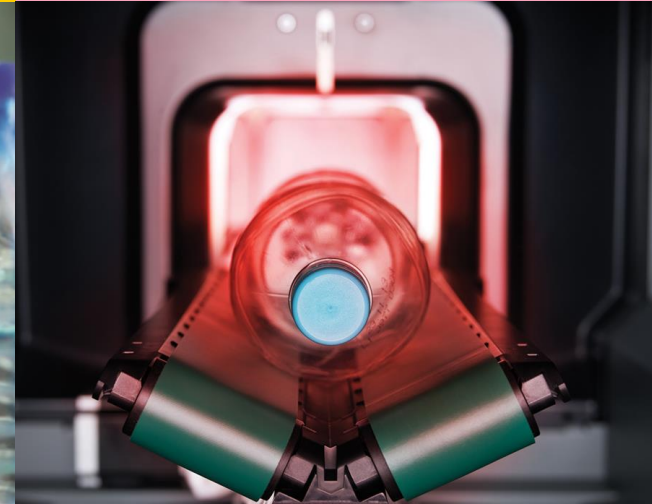
The redemption system is **easy, accessible and fair** for everyone.

Producer responsibility



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

System integrity



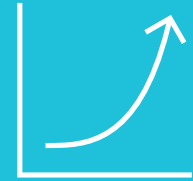
Trust is built into the system's processes through transparent management, a data-driven clearinghouse, and reliable redemption technology.



Conserving biodiversity by minimizing environmental litter



Meeting the separate collection and recycling targets



Ensuring constant and stable supply of high-quality material



TOMRA

Thank you