

ELIMINATING THE IDEA OF WASTE



**Make it
Recyclable**



**Make it from
Recycled Materials**



**Make it
Reusable**



**Innovate with
Waste**



TERRACYCLE IS A GLOBAL LEADER

TerraCycle manages a range of platforms across 20 countries. Our newest initiative Loop is expanding across a growing number of cities worldwide.



Legend

TerraCycle For-Profit

TerraCycle Non-Profit

= Loop Markets

Our strategic investors include leading waste management companies **Suez, Landbell, Itochu, Waste Connections** and **RCRambiental**

Industry partners of the Product Stewardship Institute, World Economic Forum, Ellen McArthur Foundation, SustainPack, and more

We've developed **6+ new business models** over the past 2 years alone

Globally and on a daily basis, **50+ articles** are written and published about TerraCycle

TerraCycle is Eliminating the Idea of Waste®

202+ million people recycle with us globally

In 2 years our base of collectors **grew 200%+**

We've donated **\$44+ million** to charities and schools

In 2 years we've seen a **139% employee growth**

Each month, we recycle **~1 million lbs. of non-recyclable waste** globally

We've **won 200+ awards** in innovation and social and sustainable business





Waste doesn't exist in nature



Throwaway Living

DISPOSABLE ITEMS CUT DOWN HOUSEHOLD CHORES

The objects flying through the air in this picture would take weeks to clean—except that no housewife need bother. They are all items to be thrown away after use. Many are new; others, such as paper plates and towels, have been around a long time but are now being made more attractive.

At the bottom of the picture, to the left of a New York City Department of Sanitation trash can, are some throwaway vases and flowers, popcorn that pops in its own pan. Moving clockwise around the photograph come assorted frozen food containers,

a checkered paper napkin, a disposable diaper, variously suggested as one reason for the high U.S. birth rate), and a baby's bib. At top are throwaway water wings, foil pans, paper tablecloth, guest towels and a sectional plate. At right is an all-purpose bucket and, scattered throughout the picture, paper cups for beer and highballs. In the basket are throwaway draperies, ash trays, garbage bags, hot pads, mats and a feeding dish for dogs. At the base of the basket are two items for hunters to throw away: disposable goose and duck decoys.



Tote those empties?

Or toss 'em away?

Why make hard work out of enjoying soft drinks? Every delicious flavor now comes in throwaway steel cans. No deposits, no returns. And soft drinks in steel cans taste so darn good!

BETHLEHEM STEEL



A large pile of plastic waste, including bottles, containers, and other debris, stretches across the foreground and middle ground. The background shows a sunset sky with orange and blue hues. The text is overlaid on the image.

448 MILLION TONS of
plastic are produced
every year.

More than **40% of
plastic products is
SINGLE** use.

✕ Consumer product
companies are **the 2nd
largest producers of
plastic.**

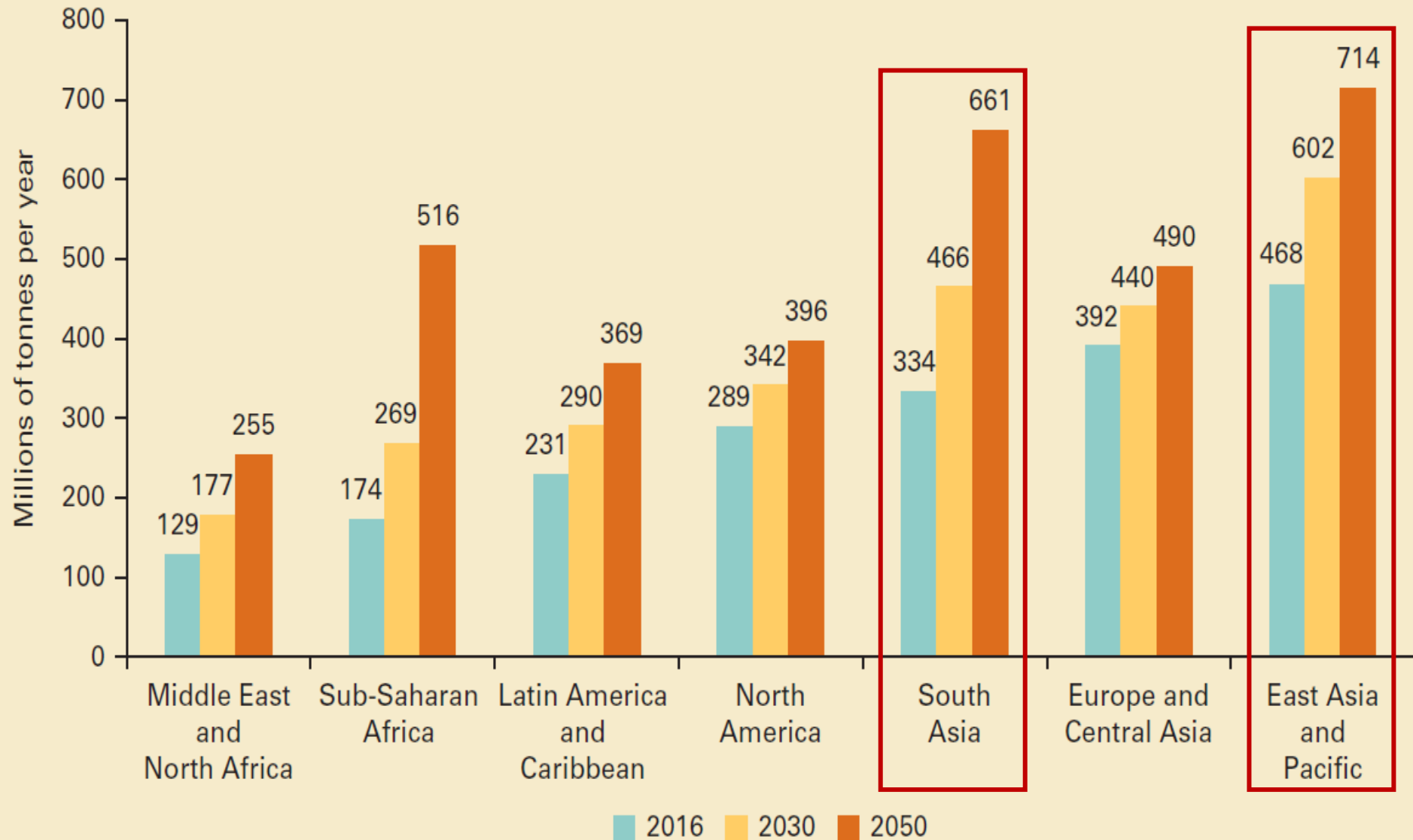
Less than 20% of all plastic
is recycled globally.

Plastics refuse may remain on the
Earth for more than **450 years.**

LIVING IN A PLASTIC CRISIS

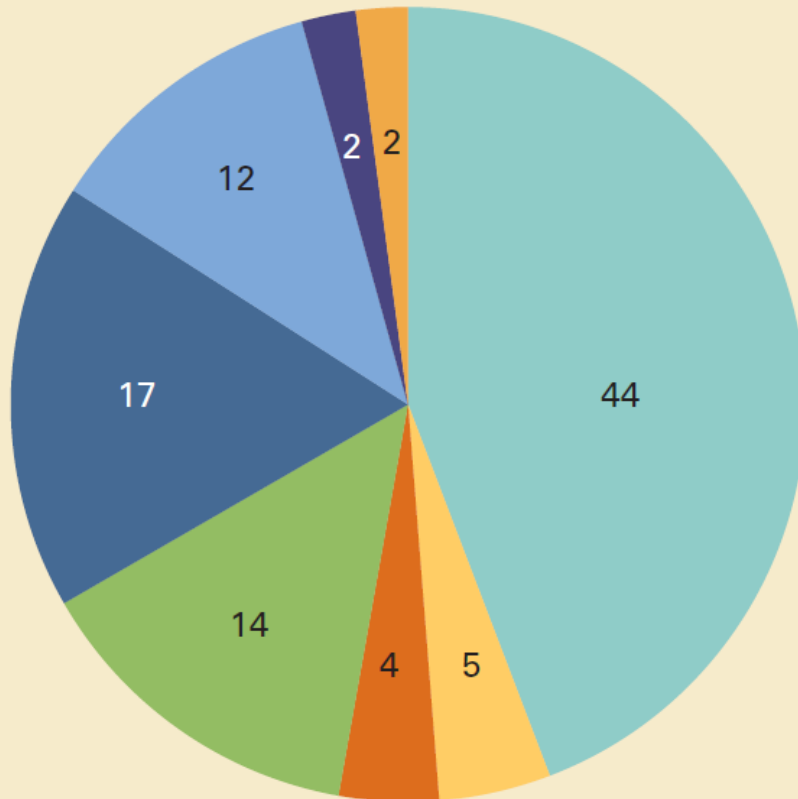
Projected waste generation, by region (millions of tonnes/year)

Source: World Bank

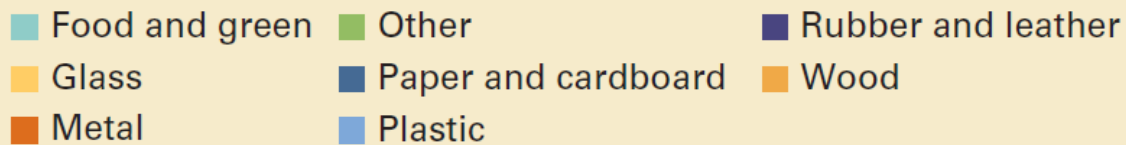


Global waste composition (percent)

Source: World Bank

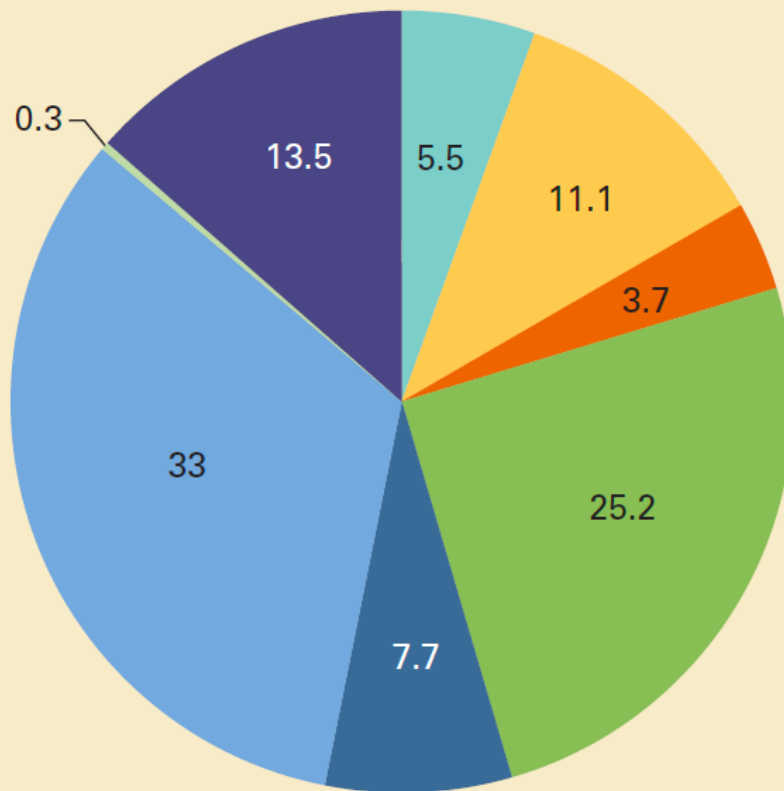


Food, paper and plastic account for 73% of global waste



Global treatment and disposal of waste (percent)

Source: World Bank

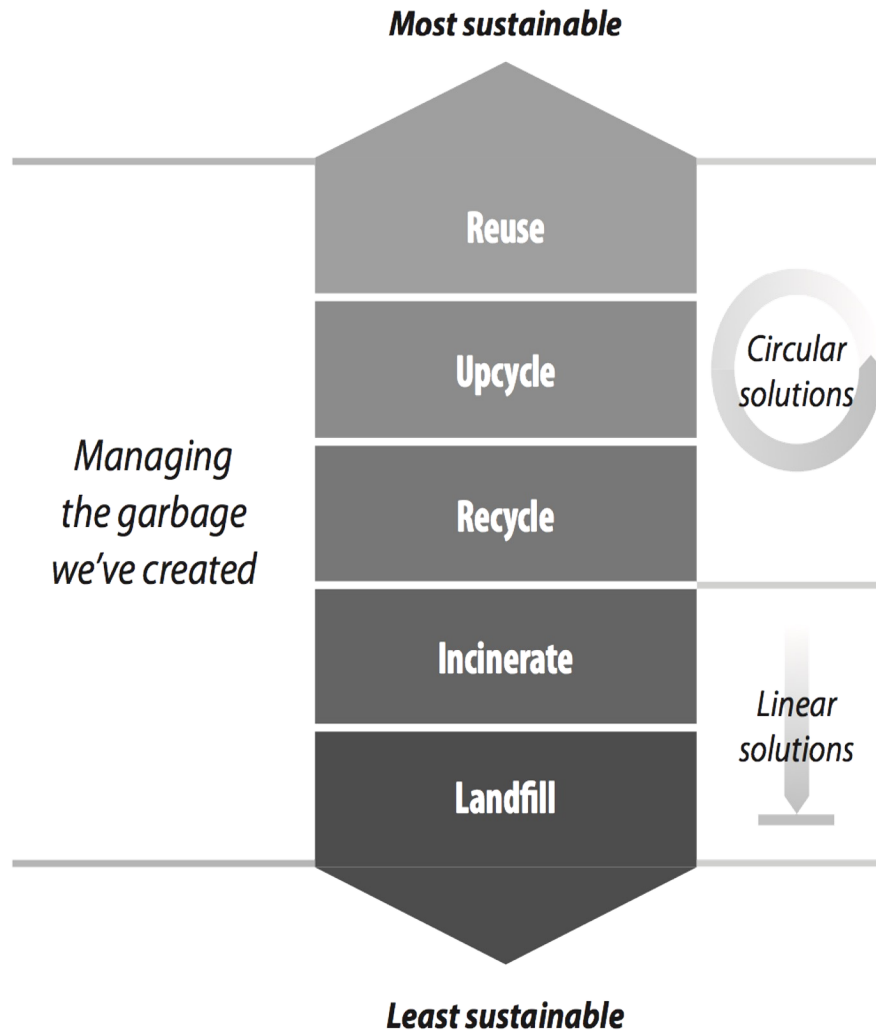


*On a global basis,
only 13% of waste is recycled,
only 5.5% is composted*

- Composting
- Incineration
- Controlled Landfill
- Landfill (unspecified)
- Sanitary landfill (with landfill gas collection)
- Open dump
- Other
- Recycling



Hierarchy of waste







The Linear Economy



Extract



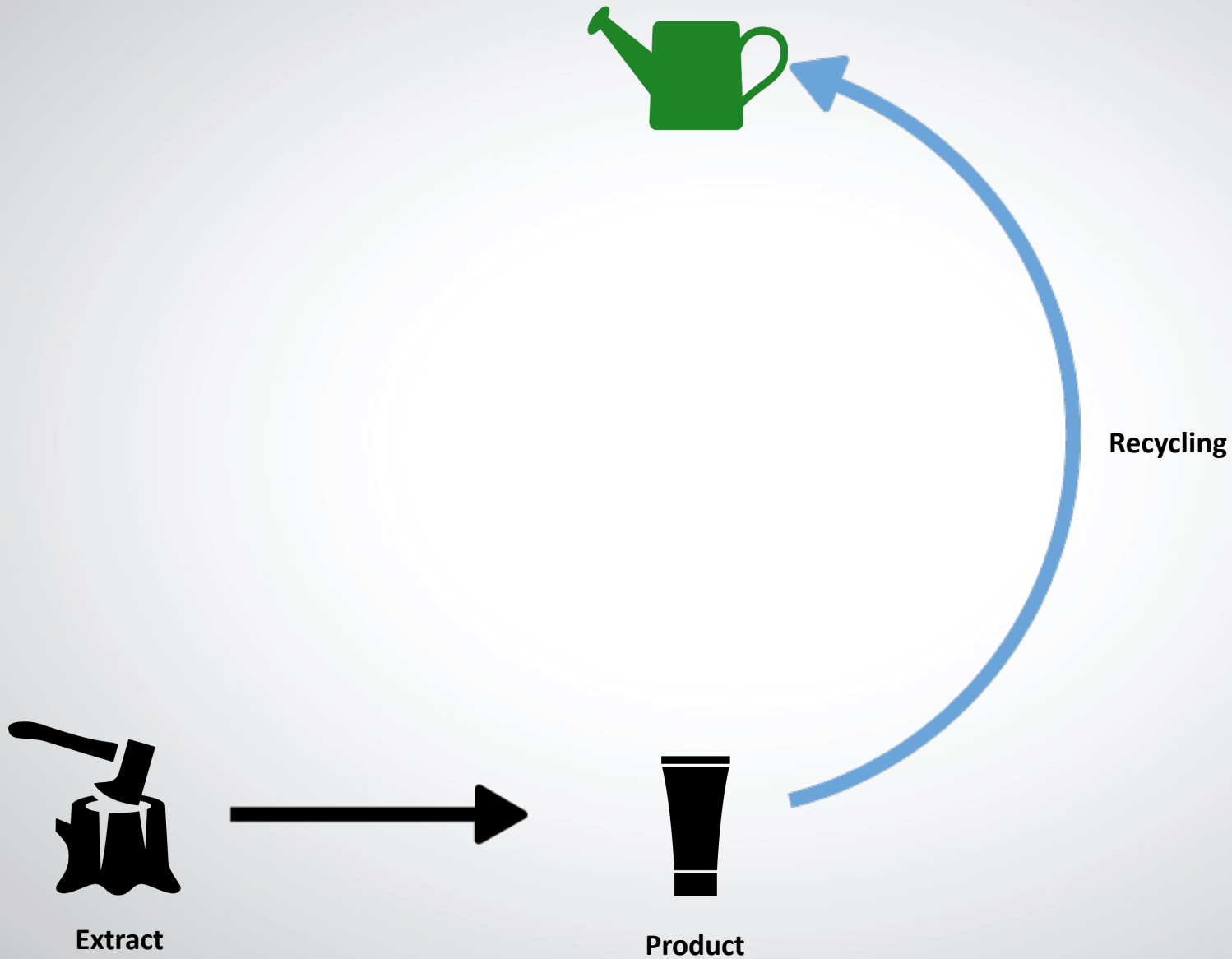
Product



Waste



Make it Recyclable

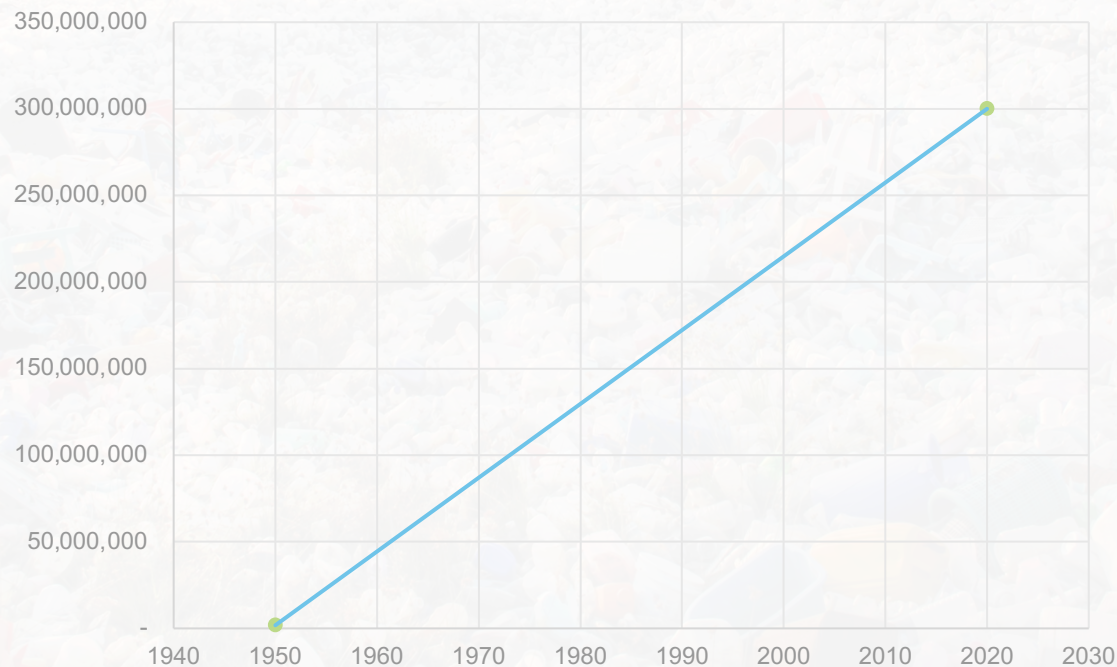


Global : Plastic Waste Generated Annually

2/3 weight of global population



300 million tons (+16,567%)
37.80 kg / person (+5,174%)



1.8 million tons
0.72 kg / person



The challenges to recycling extend from
macro to microeconomic factors.

Is it possible to create a value chain based on waste?

What makes an item practically recyclable?

THE RECYCLING BUSINESS EQUATION: If the costs of logistics and processing are less than the value of the resulting material, that product will become practically recyclable.



COSTS OF
LOGISTICS



COSTS OF
PROCESSING



RESULTING
MATERIAL
VALUE*



THAT MATERIAL
CAN BE RECYCLED

**This entire equation can be subsidized with legislation (i.e. EPR) that helps offset the costs of collection and process and/or increase the value of the resulting material*



The economics of recycling

What makes a material recyclable is not a technical solution for it, but a profitable one. This equation becomes particularly challenging to stay positive in emerging economies.



WHEN PROFITABLE = RECYCLED



WHEN NOT PROFITABLE = LITTERED



SOLVING WASTE

TerraCycle specializes in recycling materials that do not have local recycling solutions — this includes developing new processes, new formulations, and new applications.

Baseline Supply
Chain Examples



Upcycled
Examples

More detail
provided per
request



Closed Loop
Examples



Community
Builds Examples





Platform to Unite All Nationwide Retail Collections

Consumers across Japan participated in collections at 2,500 store locations nationwide to recycle post-consumption packaging.



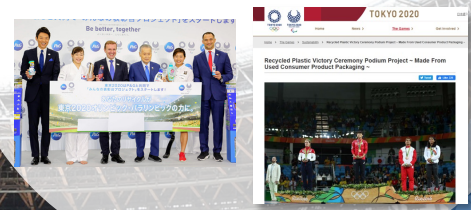
Recognition by G20 and UN

The Government of Japan highlighted the project at the G20 Osaka Summit. United Nations (Japan) helped promote the program with SNS and collection box installement.



Extensive Local and Global Media Coverage

Launch event with Olympians and Paralympians as program ambassadors. All major local TV networks and newspapers covered the story, as well as global media such as the New York Times.



School Engagement

Over 100 schools joined in the program, which was integrated into SDG education. Students created posters and collection boxes, engaging communities throughout Japan.



TOKYO 2020 Podium Project – Sustainability Legacy

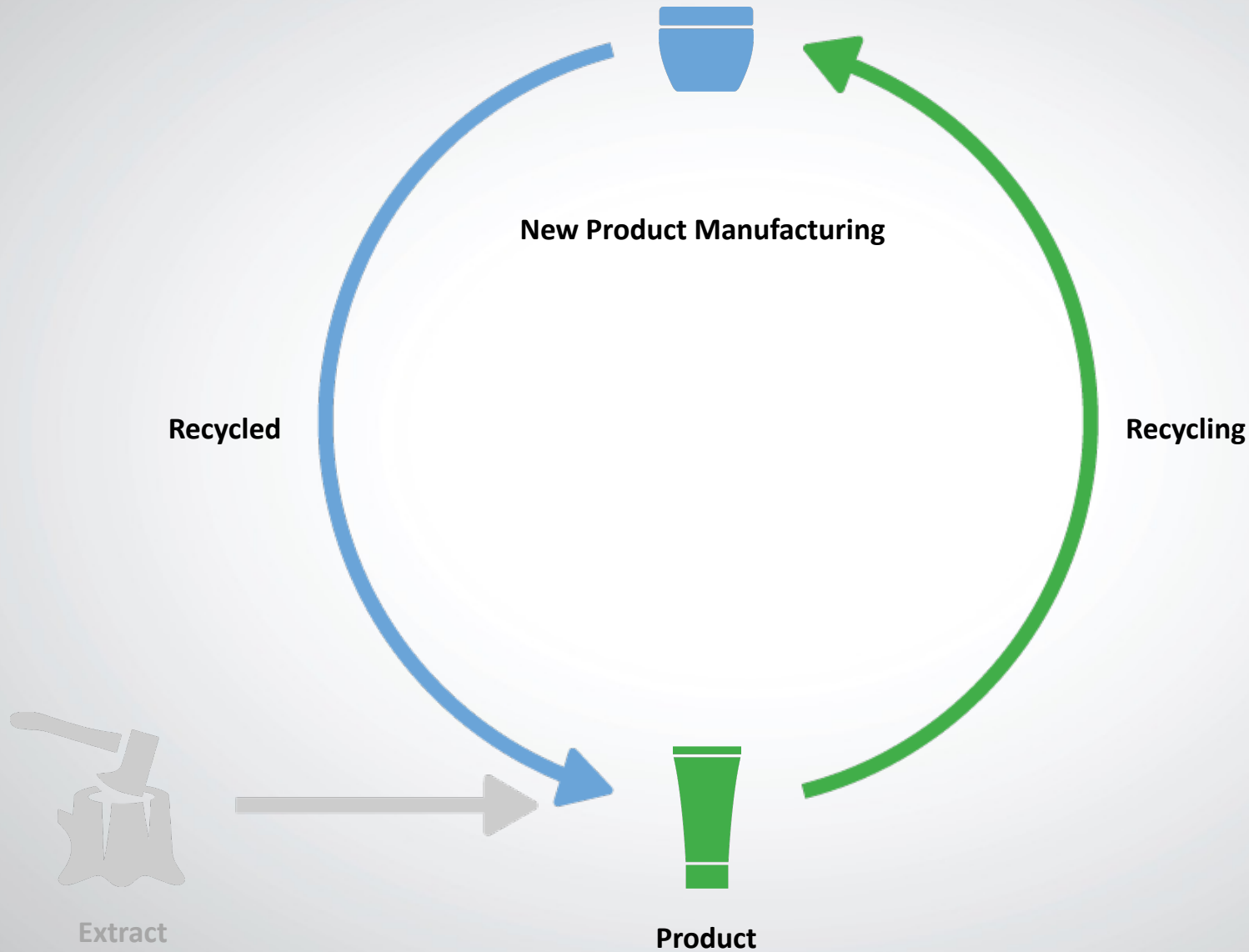
TOKYO 2020, P&G, and TerraCycle partnered together to create first podiums in history made entirely of recycled plastic for the Summer Olympic and Paralympic Games in Tokyo.

In keeping with TOKYO 2020 message, "Be better, together - For the planet and the people" the program exemplified this commitment and set a global precedent for sustainability projects linked to the Olympics.





Make it from Recycled Materials





Closed Loop + Consumer Engagement → Increased Awareness and Positive Change



First beauty care brand in Asia to provide access to recycling to its customers at ALL retail locations.

One of the first closed loop programs in Asia.

Post-consumption packaging + Design

Driving a value chain for recycling





Closed Loop + Social Impact

L'ORÉAL

Packaging into desks and chairs

Post-consumption packaging in China recycled into desks and chairs for donation





Closed Loop + Consumer Engagement → Increased Awareness and Lifestyle Change

L'OCCITANE
EN PROVENCE

Post-consumption packaging for the first time processed into polyester fabric to be used as Eco Bags

Closed Loop with further waste reduction



These bottles are
TerraCycle®
approved
for curbside
recycling

RECYCLE
ME AGAIN!



7.10 5.99

7.10 5.99

6,000 LBS of ocean waste was used to make these bottles

Storyed Materials

TerraCycle's Storyed Materials division allows brands to achieve PCR (recycled material) goals while differentiating themselves with a unique story that can be leveraged to drive sustainability, marketing, communications, retail wins and other measurable ROI.

7.10 5.99

7.10 5.99

7.10 5.99

7.10 5.99

MEET THE WORLD'S FIRST RECYCLABLE SHAMPOO BOTTLE MADE WITH BEACH PLASTIC

1 PLASTIC IS COLLECTED ON
BEACHES BY VOLUNTEERS

2 IT'S SORTED
BY TERRACYCLE



3 AND SENT FOR
CLEANING AND
GRINDING INTO
PELLETS



4 THE PELLETS ARE
THEN SENT TO P&G



5 AND TURNED
INTO THESE



IT'S THE WORLD'S LARGEST
PRODUCTION RUN OF
RECYCLABLE BOTTLES
MADE WITH BEACH PLASTIC.



United Nations
Climate Change Secretariat

PROUD WINNER OF THE UNITED NATIONS MOMENTUM FOR CHANGE LIGHTHOUSE AWARD







容器の約25%に
海洋プラを再生利用





SEKKISEI

雪肌精

Added to Supply Chain of Pilot Japan





An underwater photograph showing several pieces of clear and blue plastic waste floating in the water. A large, spotted fish is in the foreground, looking towards the camera. The background is filled with more plastic debris and some seaweed.

TerraCycle (*Loop's parent company*) is on a mission to

Eliminate the Idea of Waste®



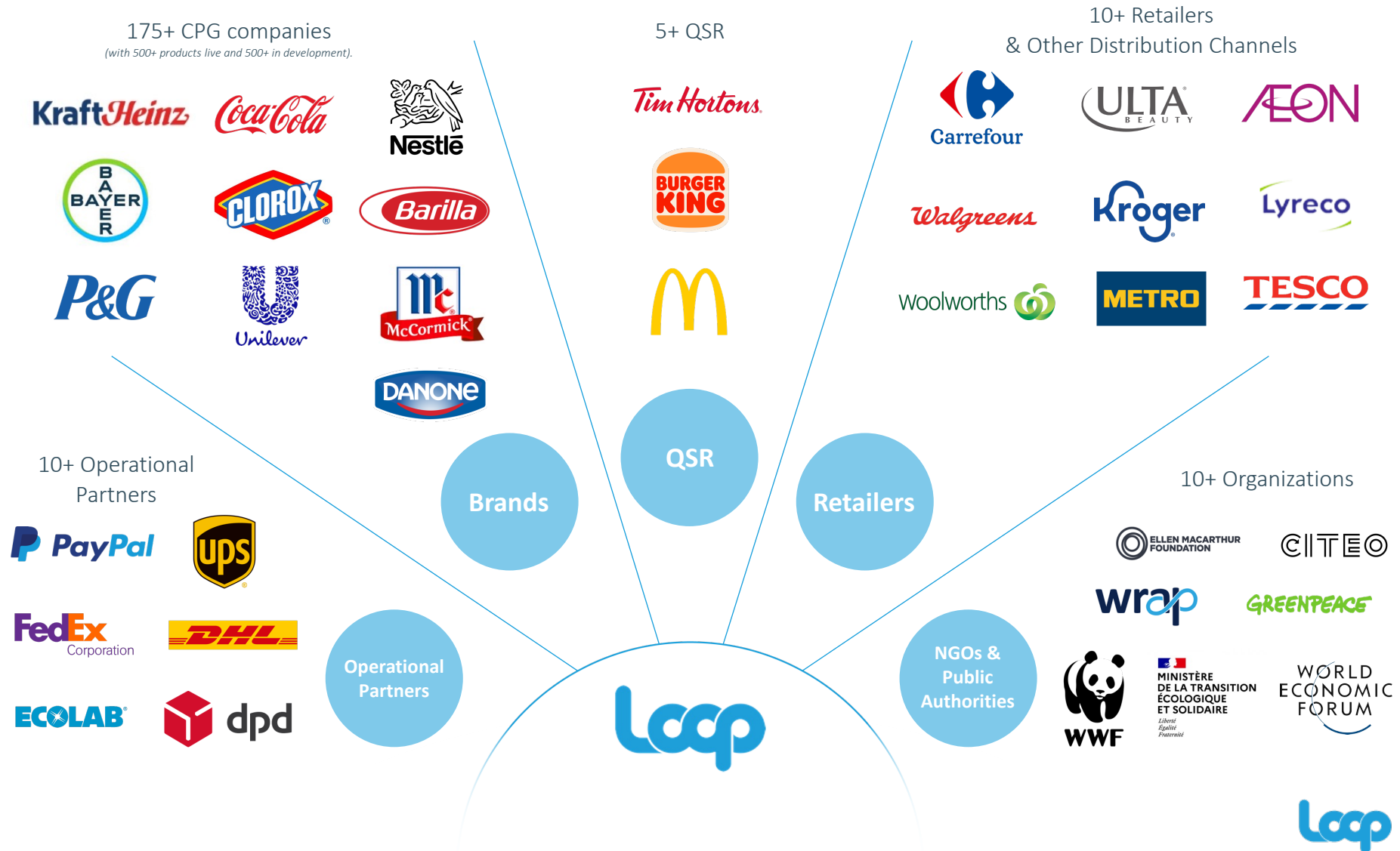
Loop is a **global platform for reuse** where any manufacturer can create reusable products and any retailer can make those available to their consumers.

Our goal is to make reuse **easy, convenient and affordable**, allowing consumers to **buy anywhere and return anywhere**.



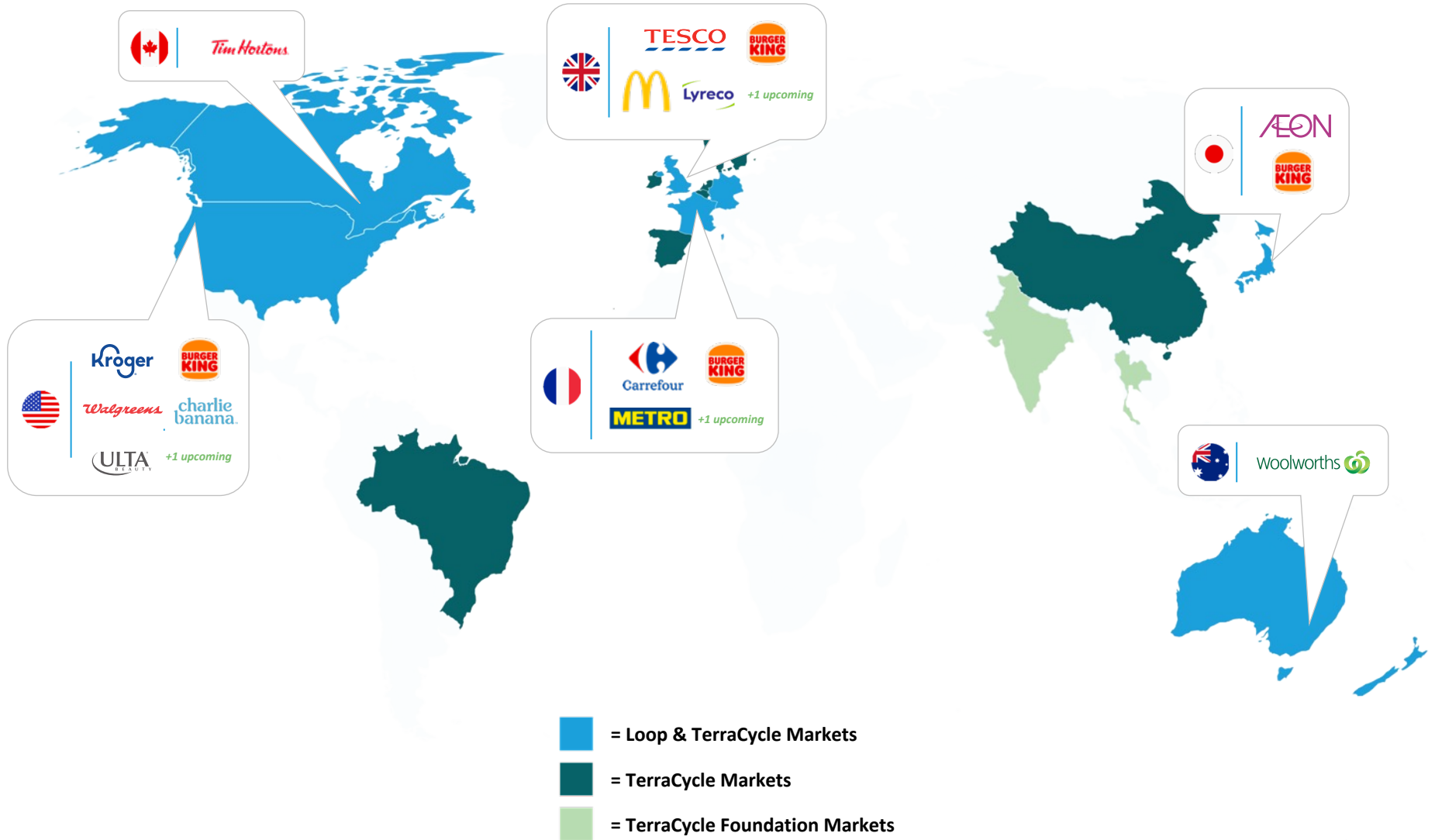
LOOP GLOBAL ECOSYSTEM

Loop is working with a wide variety of stakeholders to enable reuse at scale.



LOOP GLOBAL ECOSYSTEM

2022 and beyond are focused on launching in-store and/or online with all our partners & developing an ecosystem centered on convenience.



WISDOM FROM THE PAST

Refillable durable packaging used to be the norm.

A black and white photograph of a man in a white sailor uniform, including a white cap and a dark bow tie. He is holding a glass milk bottle in his right hand. The bottle has a label that reads "Jordan's DAIRY DELIVERY CO." and "AMT. 0. THE BORDEN CO. N.J.". A blue outline highlights the bottle, and a blue rectangular box with the word "ASSET" in white capital letters is positioned next to it.

ASSET

When a package is considered an asset its allocation per fill is the cost divided by the number of uses it can bear. **The more durable the package the lower the cost per fill.**

THE CURRENT REALITY

Disposability is **cheap** and **convenient**.



COGs

When a package is considered a COGS (Cost of Goods Sold) its cost is fully allocated per fill.
The cheaper the package the lower the cost per fill.

Loop fundamentally changes the ownership of packaging.



Packaging as an asset enables reusability, beautiful design and most importantly – innovation.



CUSTOM



STOCK



EXISTING



PACKAGING TRANSITION & PRODUCT ONBOARDING

Part 1: From Single-Use To Reuse

Loop helps brands move from single-use to reusable packaging through the onboarding process.



SINGLE-USE

Step 1
→
Design

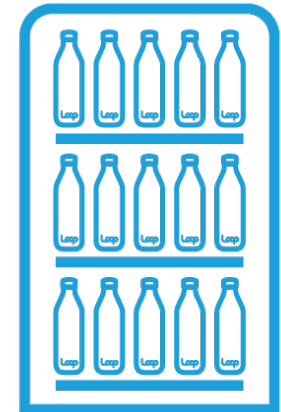


REUSABLE

Part 2: Distribution of Reusable Products

Loop works with our brand partners to distribute their new product via Loop retailer partners and/or DTC.

Step 2
→
Distribution




Carrefour

Walgreens

AEON

TESCO

ULTA
BEAUTY

Kroger
and more...





Carrefour

Hypermarket
Expansion



AEON

Live in Japan



TESCO

Live in UK

Aid
Price
Match



The Reuse
Station.

Provided by
Loop

Great everyday products,
without the waste.

Shop **Loop** Repeat

The Reuse
Station.

Provided by
Loop



Download the loop app,
shop great everyday products
and enjoy at home.



Return your empties to the Loop
returns point, once processed
we'll refund your deposit to
your Loop account.



Do it
all over again.



MAKING REUSE FEEL LIKE DISPOSABILITY

Loop is creating a network featuring retailers, fast food restaurants, courier locations, municipalities, commercial spaces, etc. – making reusability as convenient and affordable as disposability.





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