



TREND 1: RISING COSTS

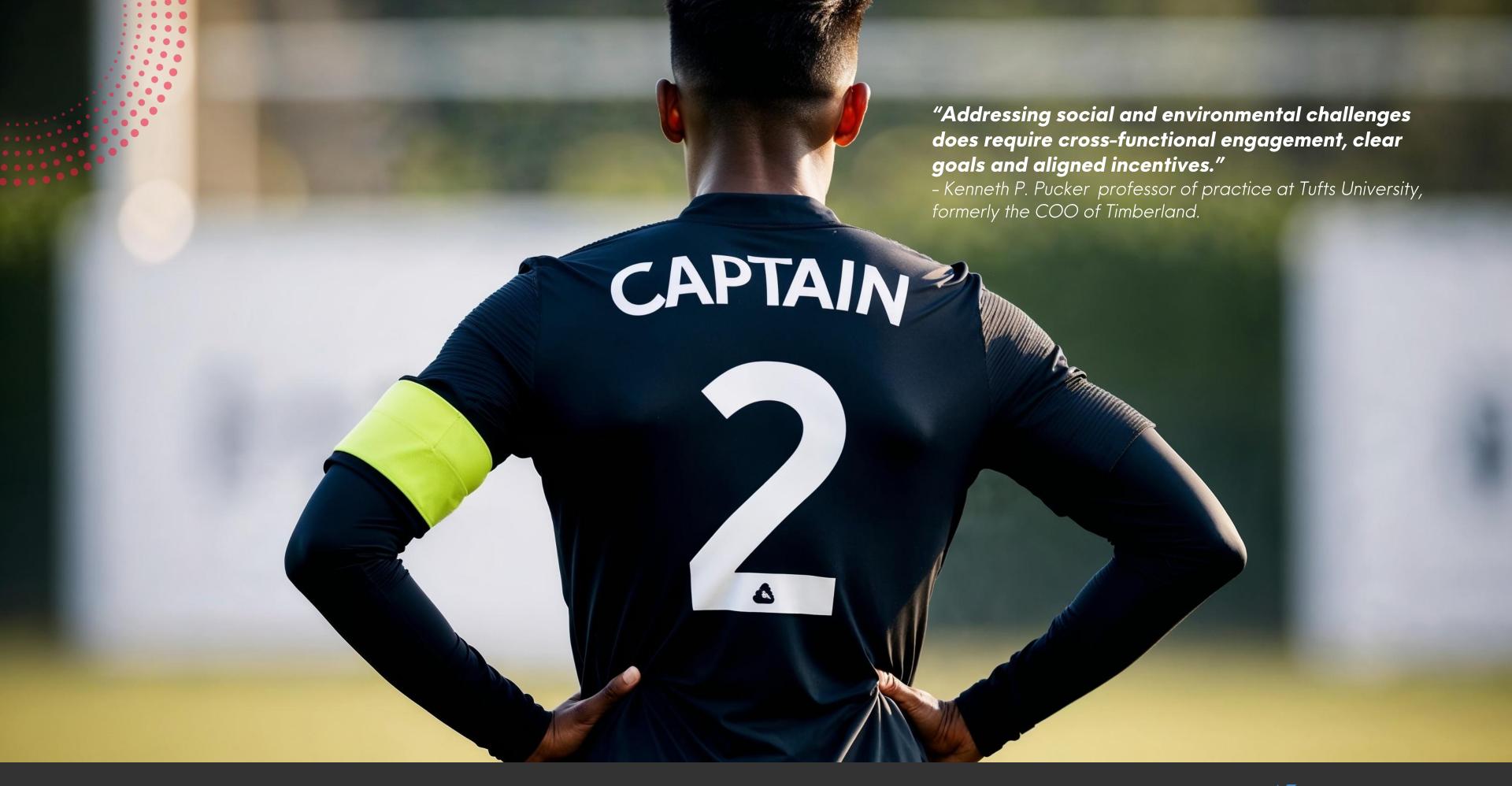


Costs in MB projected to increase by 250% between now and 2030 (\$18 to 48 million)

Costs in France increased by 100% between 2018 and 2026

You need good data to comply and control costs









TREND 2: FROM PATCHWORK TO HARMONIZATION AND BACK

27

EU States harmonizing under PPWR

same targets, same material categories, same definitions of reuse, recyclability, empty space ratios, etc.

But it is adding complexity at the same time:

- Labelling
- Substances (e.g., PFAS)
- Recycled content
- Recyclability assessments

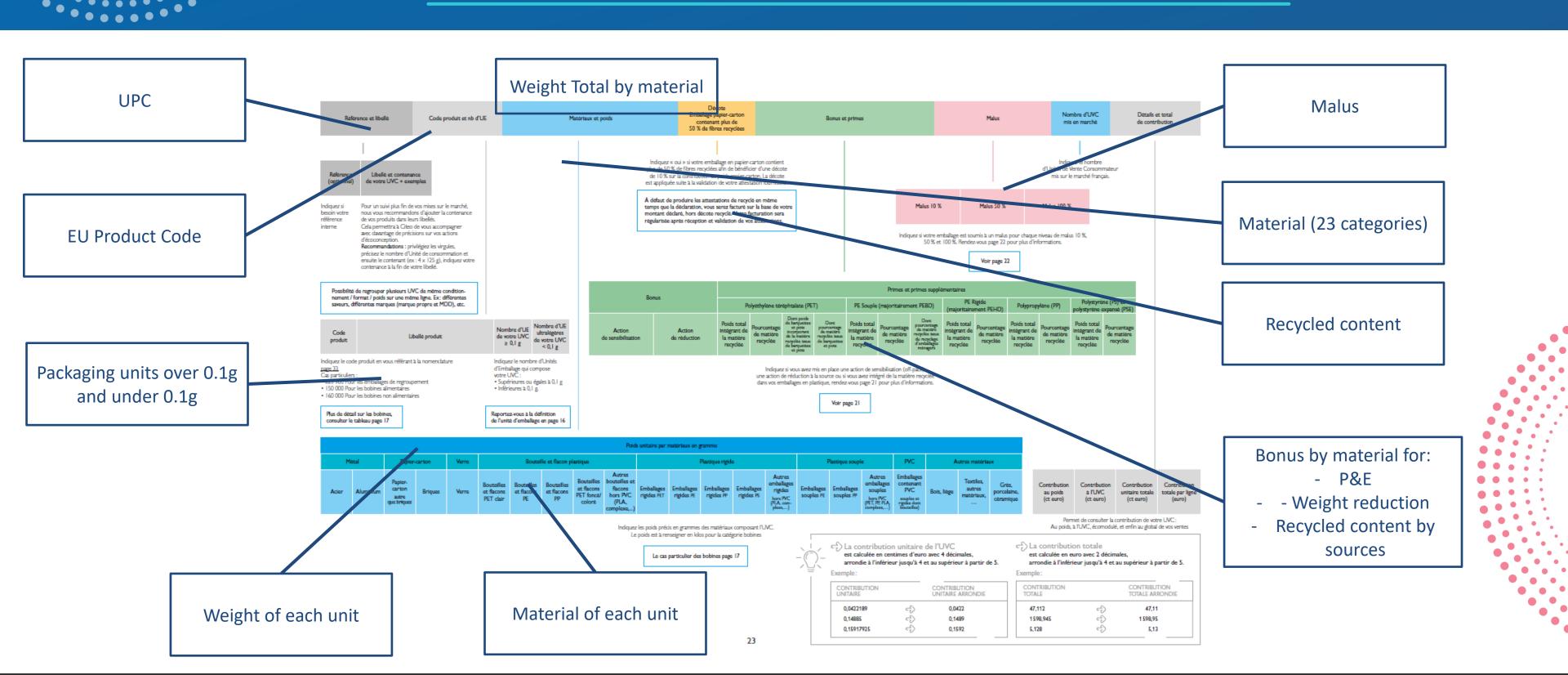
A Canadian example of national approach adding complexity is FPR.



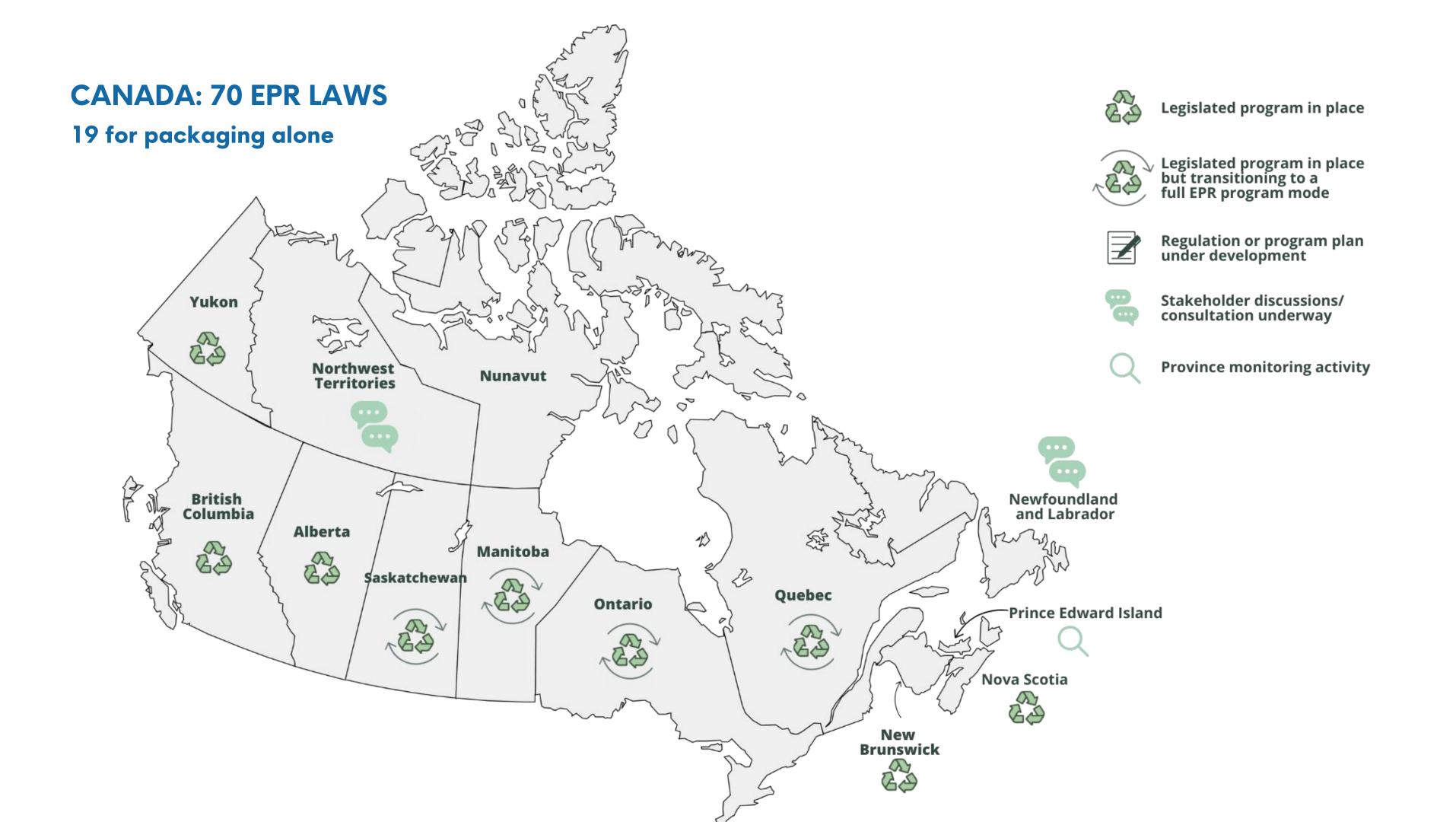




FRANCE: DATAPOINTS PER DECLARATION







USA CURRENT STATE: EPR COMPARISON

	Oregon	Colorado	Maine	California	Minnesota	Washington	Maryland
Signed Into Law	August 2021	June 2022	July 2021	June 2022	May 2024	May 2025	May 2025
Covered Materials	 Packaging Packaging-like products Paper products Food ServiceWare *OR is a "Bottle Bill State"; DRS packaging is exempt 	 Packaging Packaging- like products Paper products 	 Packaging Reusable packaging *ME is a "Bottle Bill State"; DRS packaging is exempt 	 Packaging Packaging-like products *CA is a "Bottle Bill State"; DRS packaging is exempt 	 Packaging Packaging-like products Paper products Reusable packaging 	 Packaging Packaging-like products Paper products Reusable packaging 	 Packaging Packaging-like products Paper products Reusable packaging
B2B Applicability	Yes	No (in year 1)	Yes	Yes	No	No	No
Full or Partial System Funding	Partial	Full	Full	Partial	Partial	Full	Partial
Implementation Date	July 2025	July 2025	April 2026	January 2027 (2032 Fully)	January 2029 (2032 Fully)	March 2029	July 2029







TREND 3: RESOURCES AVAILABLE ARE GOING DOWN

"Sustainability job vacancies are down nearly 21% from the peak earlier this year," says top EU recruiter, ESC REC

"When the initial targets were set, we may have underestimated the scale and complexity of what it takes to make [hitting sustainability targets] happen," says Hein Schumacher, Unilever CEO 59% of U.S. CEOs Say They'd Scale Back ESG Efforts to Cut Costs During a Downturn — KPMG

Buyer's Remorse for CFOs Who Overinvested in ESG Roles — Bloomberg News









YOUR GAME PLAN

Key elements

- 1. What policies when where how?
- 2. Get your data right
- 3. Understand and quantify your compliance needs and risks
- 4. Execute on reporting precisely and on time



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