



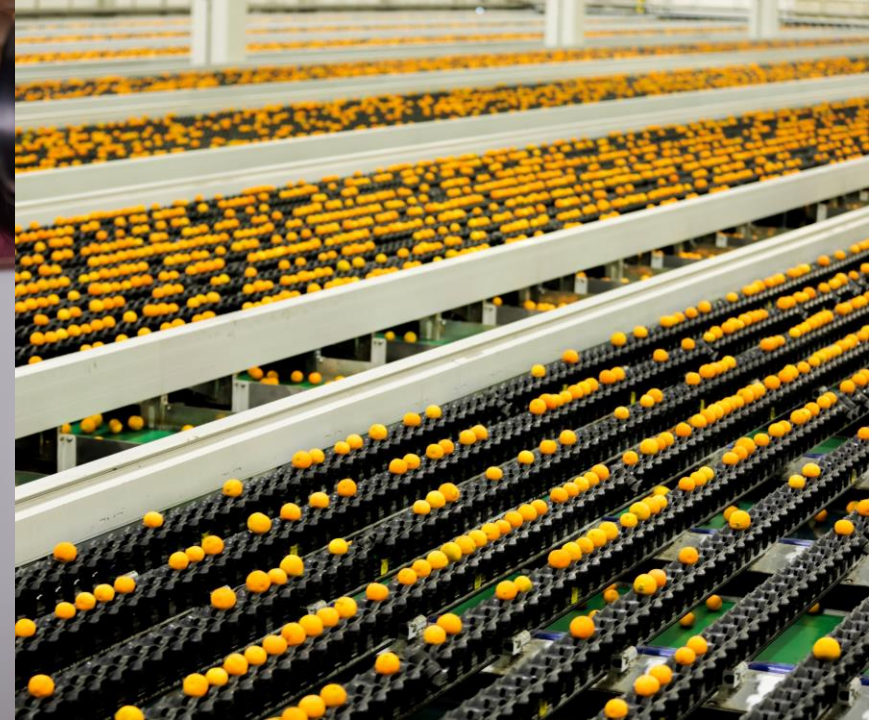
TOMRA

Faser-zu-Faser-Recycling Neue Textilien aus alten Stoffen

Malte Althaus

Berlin, Dialogforum Kreislaufwirtschaft NABU

17. Oktober 2024



Leading the
Resource Revolution



~5,400
employees
globally



14.8
billion NOK
revenues in 2023

Publicly listed on Oslo Stock Exchange (OSEBX: TOM)



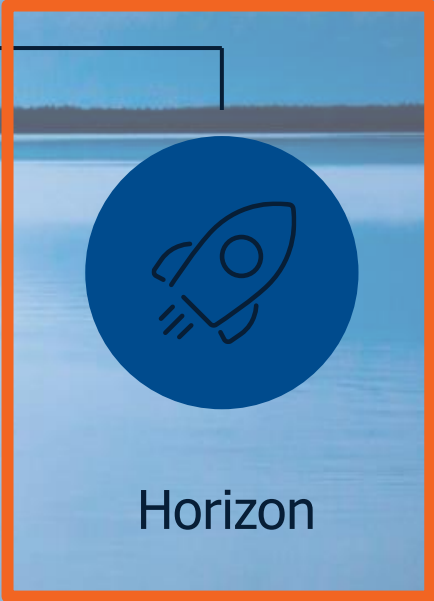
Collection



Recycling



Food




Horizon




The next frontier of the resource revolution.





Textiles is an integral part
of being human...



...but most textiles
are wasted after use



300 million

people employed globally in
the production of textiles



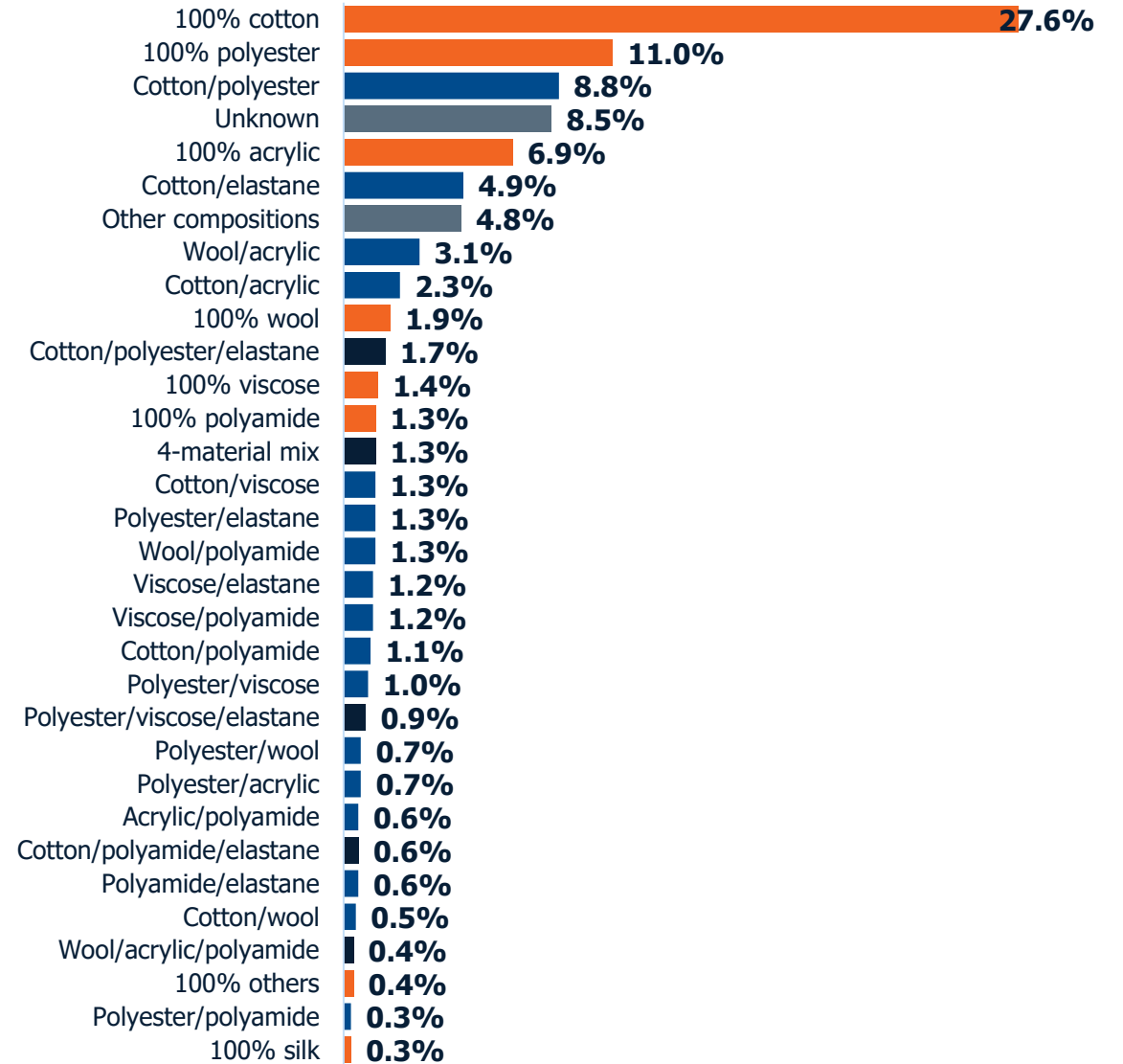
1%

of textile fibers produced are
kept in the loop today



CHALLENGE #1

Collected used textiles are extremely heterogenous



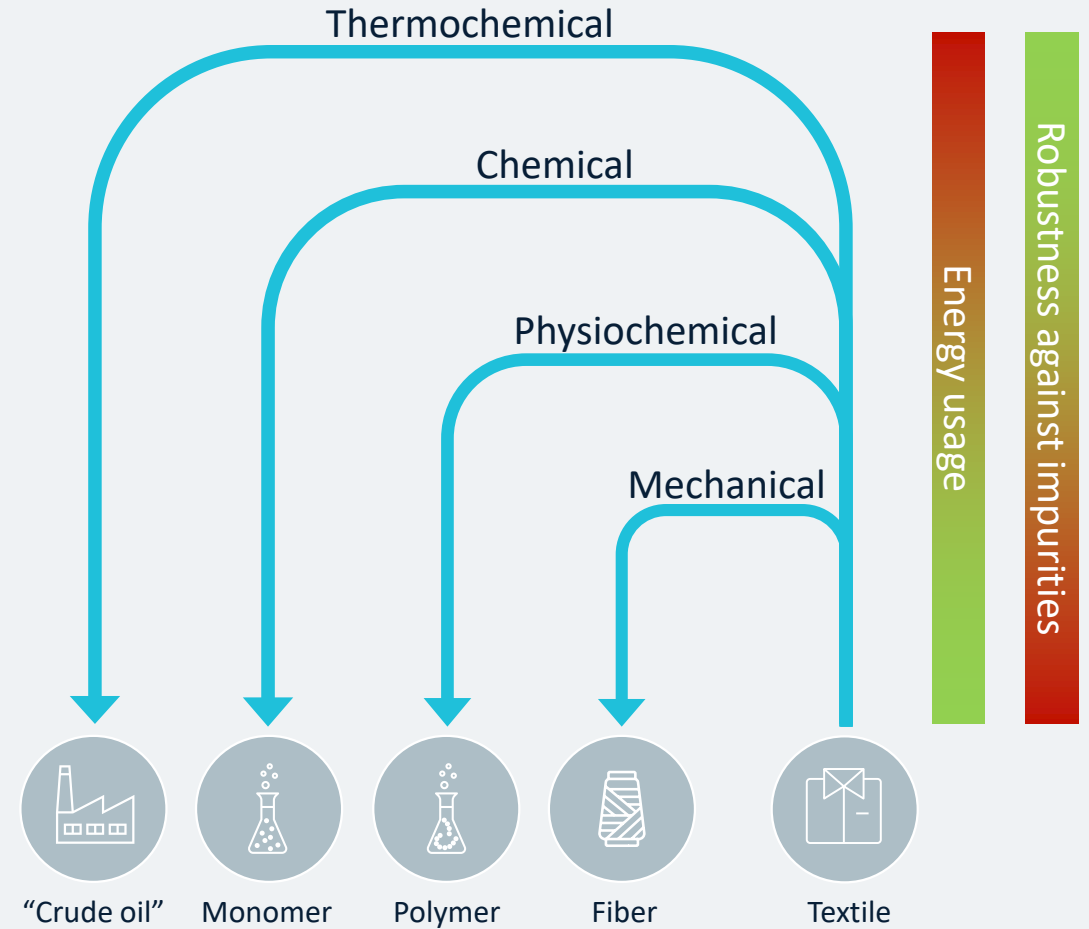
CHALLENGE #2

Trade in used textiles is an entrenched business with few incentives to change.



CHALLENGE #3

Recycling technologies are
picky and immature
...so far



CHALLENGE #4

Continued gap between what consumers say they want and what they actually buy

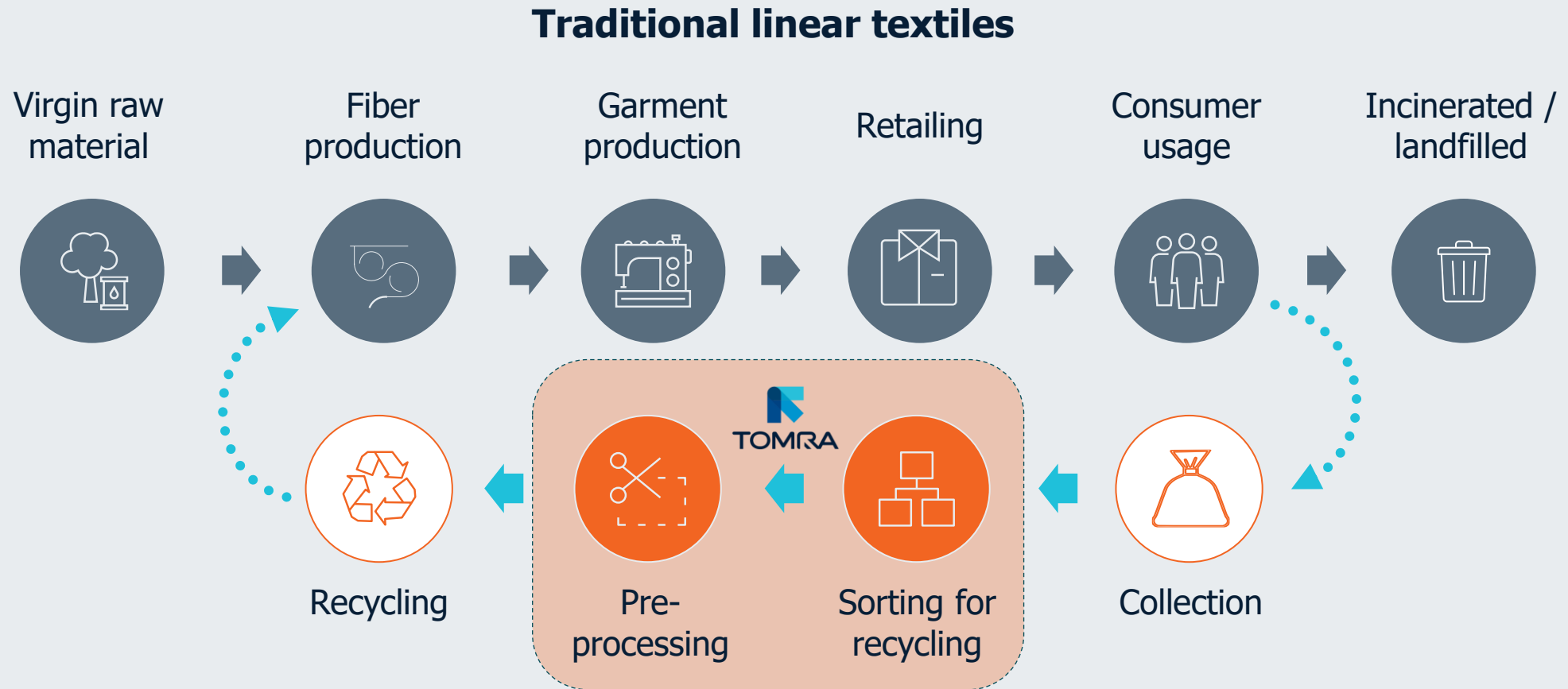
Which are, for you, the most important factors when purchasing clothing and accessories?

Rank	
①	Product quality
②	Price
③	Product fit
④	Product durability
⑤	Product style
⑥	Environment
⑦	Product assortment
⑧	Brand coolness
⑨	Shopping experience
⑩	Social impact
⑪	Level of service
⑫	Friend/family
⑬	Social media

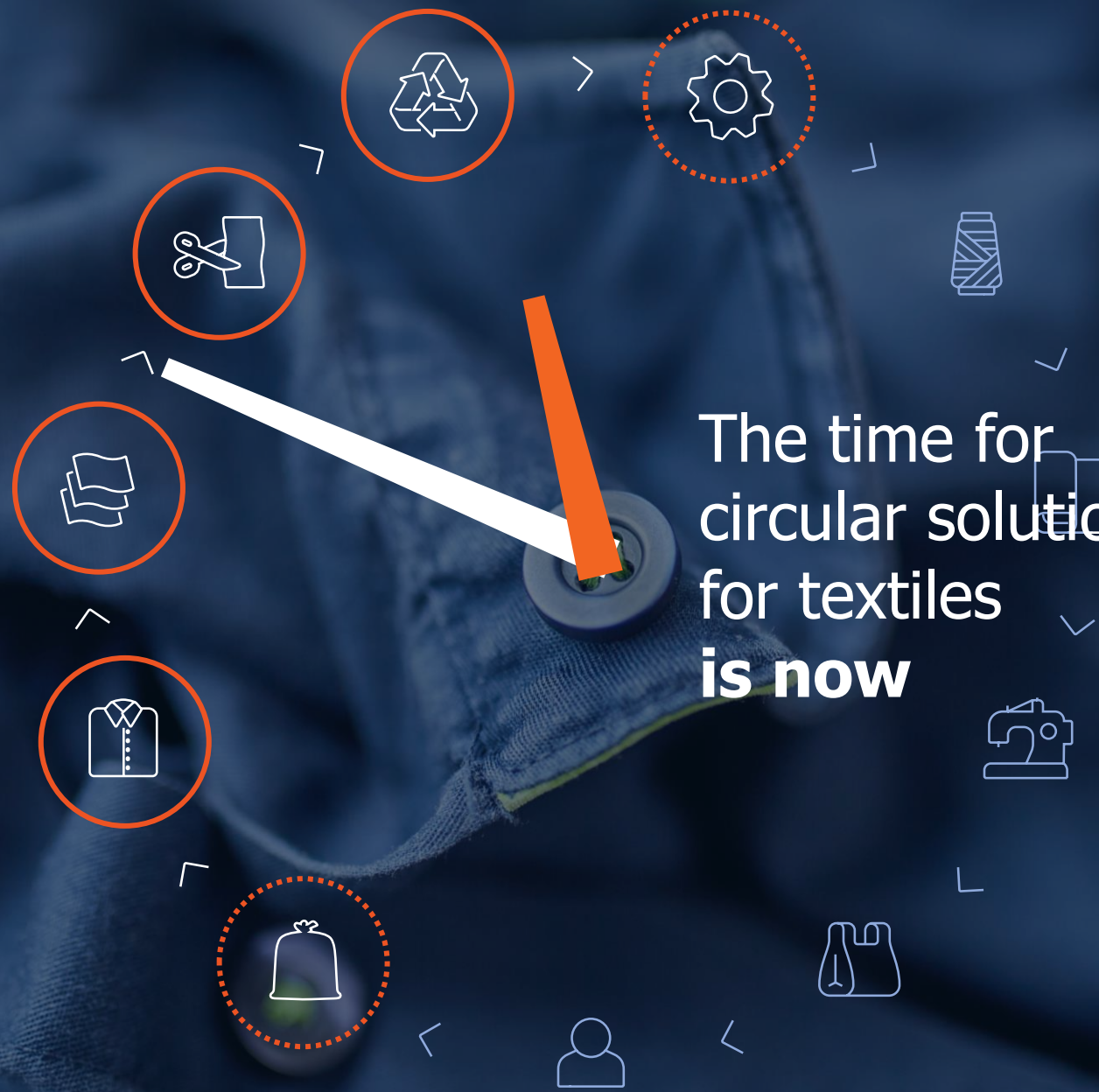
100%
RECYCLED
FABRIC

COTTON

Matching heterogeneous input and picky recycling processes requires **sorting at scale**



New circular textile value chain



The time for
circular solutions
for textiles
is now



The momentum for change is here...



In plain sight

Mandatory separate collection
Extended Producer Responsibility
Recycled content requirements



Nowhere to hide

Collected textiles cannot be
shipped unsorted and deadstock
cannot be destroyed



...and enabling technologies are evolving.

Ready to scale

Leading recyclers are developing robust solutions for chemical and mechanical recycling of textiles

€800M+ invested

Leading Northern European brands and investors announcing commitments of €260M in Infinited Fiber, \$600M in Syre (offtake), respectively, in Q1 2024



TOMRA Textiles

Key need to believe

- 1 Regulatory push towards a circular textiles value chain
- 2 Recycling technologies matured and scaled for main fiber fractions
- 3 Brands committing significant off-take for recycled material



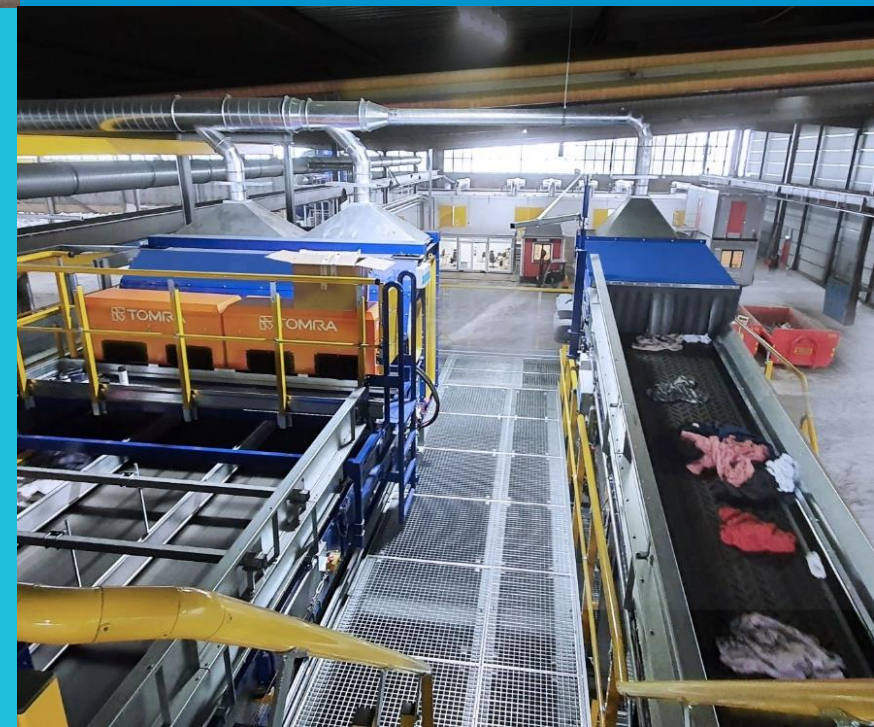
TOMRA tech already auto- sorts textiles in Malmö



Capacity to sort 25,000 tons
garments annually



World's first scaled, fully
automized textile sorting
line





Transforming Textiles
whitepaper



Malte Althaus
Senior Technology Manager
TOMRA Textiles

malte.althaus@tomra.com



Our LinkedIn
Newsletter

tomra.com/textiles