

Petainer

# Environmental, Social and Governance Report

2024



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A Message from Our CEO



Hugh Ross  
CEO



*It doesn't feel that long ago I was writing the introduction to our 2023 ESG report so welcome back and I hope you enjoy reading the 2024 version!*

*Estimates we made a year ago as to how the market requirements would develop have largely evolved as expected. In the world of Single Use PET, our Customers, rightly, continue to challenge Petainer to push lightweighting and recycled content as far as possible to achieve the most sustainable solution, without compromising quality.*

*Interest and demand for Reusable products has grown, be that in the small or large format Product category, as Customers better understand the environmental benefits of repeat use of a robust package, as opposed to repeat use of energy and materials in manufacturing.*

*Regulatory change has contributed to these trends, but the overall message is that PET, be it in recycled content or reusable format, is a truly beneficial material for the environment. We are always delighted to engage with our Customers to assist in meeting their demand for quality, light but robust packaging to enhance the presentation of their brand to the Consumer in the Retail environment.*

*We set ourselves challenging goals a year ago. Assessment by EcoVadis and CDP were two areas we aimed to improve and I am pleased to tell you, as you will read later in this report, that our Employees rose to the task and delivered.*

*As an organisation, we subjected ourselves to an internal evaluation by our Employees by conducting our first ever global Employee survey. The results were pleasing, but more importantly, the feedback was insightful. At all locations we drew up an "Action Plan" based on the areas*

*of improvement which the feedback indicated was necessary and we are regularly reporting back to our Employees on progress being made in delivering the respective "Action Plans."*

*The opening of our new site in Tennessee was a highlight in 2025. Our Supply Chain model is based on manufacturing within the end user market. USA, in 2025, presents a great example of the advantages of this model. Carbon usage in the supply of our products to the Customers has been reduced, jobs have been created and risk and uncertainty in the Customer's Supply Chain from ever changing Tariffs has been removed.*

*As indicated in last year's report, we will be operational in Valencia by the end of this year. The essence of the project is for Petainer to bring its carbon-reducing product solutions to the end user market and support Customers as they face the challenge of Regulatory change.*

*As you read the 2024 ESG report you will see some of the new product solutions we have launched during the year. I hope you will find them interesting and see clearly that in all cases carbon reduction benefits result.*

*The key driver remains for all of us at Petainer to supply our Customers with Product solutions which help them to deliver their growth plans in an environmentally beneficial way.*

*I hope you enjoy reading our 2024 ESG report.*

**Hugh Ross**  
Group CEO, Petainer

## From Our Sustainability Director



Dr. Michael Joyes  
Sustainability Director

*I'm pleased to share Petainer's Environmental, Social and Governance (ESG) report for 2024. It marks another year of effort to bring down our impact as a PET converter. We are really excited to have set up a brand-new site in Tennessee, USA, which will focus on bringing reuse to the fore in North and South America in large and small format, as well as delivering our core solutions for the beer, wine and spirits trade. The Americas is a unique market that I believe we have the right product mix to generate significant sustainability savings for brands across all markets. The Team have been diligent in setting up the site and systems the Petainer way, with a 'Right First Time' mentality. Our employees are excited to bring our product range to life at this site, and support us and our customers in delivering on sustainability targets.*

*Our other sites continue apace with our science-based targets delivery, and as you will read in this report, we have delivered some outstanding results. We have continued to reduce our carbon emissions, increase our reuse proportion and our use of recycled content remains impressive, especially in our Nordics operation. Please enjoy reading through this report, and of course, we would be delighted to support you on any new development projects in the coming year.*

**Michael Joyes,**  
Sustainability Director

## Company Overview

Petainer enables businesses to grow without their CO<sub>2</sub> footprint growing with them. We innovate easily integrated one-way and reusable PET packaging to decarbonise established food and beverage markets. Petainer manufactures in 4 countries across Europe, Asia and North America giving it a global manufacturing footprint together with local on the ground support.

Petainer is owned by Ara Partners. Ara Partners is a global private equity and infrastructure investment firm focused on industrial decarbonisation. Founded in 2017, Ara Partners seeks to build and scale companies with significant decarbonisation impact across the industrial

and manufacturing, chemicals and materials, energy efficiency and green fuels, and food and agriculture sectors. The Company operates from offices in Houston, Boston, Washington, D.C., and Dublin. Ara Partners closed its third private equity fund in December 2023 with over \$2.8 billion in capital commitments. As of December 31, 2023, Ara Partners had approximately \$6.2 billion of assets under management.

For more information about Ara Partners, please visit [www.arapartners.com](http://www.arapartners.com).

**Ara** Built to Decarbonize.™



## Our Mission

"To use our platform in advanced Single Use sustainability solutions to become the Global Innovative leader in the supply of Reusable PET packaging."

## Our Product Portfolio

### Reusable



**Watercooler Bottles & Preforms**  
**Replace:** Polycarbonate  
**Benefits:** Low carbon, wash resistance  
**Markets Served:** Mineral water



**Reusable PET Bottles**  
**Replace:** Reusable Glass  
**Benefits:** 10x lighter than glass, more cost effective to manage  
**Markets Served:** Carbonated soft drinks, mineral water

### One-way



**One-way PET Bottles**  
**Replace:** Glass, aluminium cans  
**Benefits:** Design flexibility, up to 100% rPET  
**Markets Served:** Carbonated soft drinks, mineral water, household



**PET Preforms**  
**Replace:** Blown bottles  
**Benefits:** Most efficient transport of packaging, flexibility of  
**Markets Served:** Carbonated soft drinks, mineral water, household



**PET One-way Kegs**  
**Replace:** Steel Kegs  
**Benefits:** Low carbon, low weight, export ready  
**Markets Served:** Beer, cider, coffee, kombucha, high pressure processed juices



## 2024 Sustainability Progress

27%

of resin purchased  
used for reusable  
PET packaging

37%

of resin purchased is  
post - consumer  
recyclate

99%

of all energy used  
is from renewable  
energy sources

## Our Core Principles

### Reuse

Reuse has been important to Petainer for over 30 years, and we have made it one of our core missions to expand PET reuse globally. We have always supported the spread of reuse to new markets, as we are convinced that reusable PET is a sustainability powerhouse.

Life Cycle Analysis studies are the gold standard for evaluating packaging sustainability, and repeated studies in Europe and the Americas have shown reusable PET is the most sustainable packaging for beverages when compared to reusable glass, aluminum cans and more. What these studies show is that whilst the reuse of packaging has a substantial impact, the material is more important. The packaging weight and emissions in manufacture can outweigh reuse benefits, with heavy glass as an example where the weight and emissions from glass production reduce its sustainability even when reused.

Reusable PET has a lower cost to entry, and lower cost to maintain, with fewer breakages meaning more bottles returned and fewer new bottles needed. Extended Producer Responsibility Schemes (mandated in the EU and prevalent elsewhere) and dedicated packaging taxes are often more lenient towards reusable packaging, because of the understanding of its benefit to carbon reduction and consumer behaviour changes.

Reuse is becoming ever more important, with powerful legislation in the EU mandating beverage packaging reuse from 2030, and the green shoots of reuse in North America encouraged by an existing flourishing South American market.

### Recycled Content

PET waste is not waste, it's a resource. The more PET bottles we collect, the more we can turn into new bottles, strengthening the association in the consumer between recycling and cleaner cities and green spaces. Petainer has pioneered the use of recycled PET (rPET) in one-way preforms for decades from our Swedish site based in Lidköping, primarily serving the Nordic market. The use of rPET is more difficult than using virgin PET, and our experts ensure that when we add recycled content we don't lose performance. Petainer used 21,727 tonnes of recycled pellets and flakes in 2024; this led to avoided emissions of 36,719 tonnes CO<sub>2</sub> equiv. This equates to the production emissions of ca. 1.3 billion 0.5 L 100 % rPET one-way bottles.

### Design for Recycling

All of our packaging solutions are designed in a way that makes it easier and more efficient to recycle. This concept allows us to plan ahead, with the understanding of how a product is disposed of and makes its way through the recycling system and into new products as post-consumer recyclate.

Petainer utilises PET plastic resin as the base of all of its products, both due to the high performance of this plastic type, but also because it is the most widely recycled plastic worldwide, meaning that acceptance in recycling streams is high, and there is a lot of demand for recycled PET resin for use in new products. Whether small or large format, Petainer's products are easily collected, dismantled and sorted in the recycling infrastructure.

# CDP Disclosure

Petainer is delighted to announce our CDP Scores for 2024 (reporting year 2023). Having taken part in the full submission for the first time, Petainer scores showcase the efforts made to reduce our carbon footprint, and tackle sustainability throughout our value chain. Having achieved a B score in its previous submission of the minimum questionnaire, the wider submission showed Petainer score very highly in categories such as Risk Disclosure, Opportunity Disclosure, Emission Reduction initiatives and Low Carbon Products. The result was an overall Carbon Score of B.

In its submission, measured from a 2018 baseline, Petainer details the progress made to key sustainability targets. The key **headline is a 37 % reduction in gross emissions from our 2018 baseline**. Measured against our intensity metric, an impressive reduction of 35 % (in tonnes of CO<sub>2</sub> per tonnes of resin purchased) was made. A large contribution in carbon reduction is in the substitution of virgin PET for recycled PET.

The **increase in rPET usage, to 35 %**, reduces the need for virgin PET manufacture and uses 'waste' material for new products which is sensible for sustainable products. Coupled with incoming EU legislation and brands' own commitments to carbon reduction, recycled content will become ever more important.

The greatest impact on the target is the transition to renewable energy (Scope 2). At our two major manufacturing sites, which accounts for 98% of the energy purchased across the group, Petainer has used renewable power since 2019.

Michael Joyes, Sustainability Director, stated, "We remain dedicated to helping businesses grow while minimising their Greenhouse Gas Emissions. A key focus of this is sustainable manufacturing, which is why we are committed to a science-based target and maintaining transparency in our processes and reporting.

Data is key to improving a company's sustainability and reporting via the full questionnaire

this year allowed us to delve deeper into our operations and value chain to uncover areas where we are succeeding and those that we can improve on.

We measure ourselves primarily on our carbon impact, where we have shown impressive reductions from our baseline year in Scope 1, 2 and 3 emissions. This is reflected in A and A- scores awarded by CDP in these categories. We know this has a direct impact on our customers who are increasingly aware of their carbon impact and the power of reducing their packaging carbon footprint. We collaborate closely with our customers, recognising that their carbon reduction strategies are often influenced by emissions outside of their direct control—Scope 3 emissions. The steps we take to make our production more sustainable help ease the process for our customers as they work toward their own carbon reduction goals."



## Avoided Emissions by Reusable Products



## Scope 4 Emissions

Scope 4 emissions refer to avoided emissions — greenhouse gas (GHG) emissions that are prevented or reduced due to a product, service, or activity when compared to a conventional alternative.

Unlike Scope 1, 2, and 3 emissions, Scope 4 is not formally recognized under the GHG Protocol, but it's increasingly used in sustainability reporting and product life cycle assessments (LCAs).

## Scope 4

Scope 4 emissions are a new metric for exploring the benefit of a product in the market. Scope 4 covers emissions that are avoided from using one product in place of another. As an example, using a reusable PET bottle for mineral water can replace 25 single use plastic bottles as it is washed and reused multiple times. This removes 25 potential bottles from the supply chain. The Scope 4 emissions count the saved emission from the 25 potential bottles.

Petainer manufacture a range of reusable bottles for use in the mineral water and soft drinks markets. Ranging from 0.5 L through to 19 L, they offer producers an option to enter the reusable packaging space.

**Reuse makes 27 % of the total resin we purchase.** This would be the equivalent of over half a billion single use bottles, 0.5 L 100 % virgin PET.

Reusable PET products are bottle to bottle recyclable, providing the perfect circular economy system.

<sup>1</sup> Compared to market incumbent 100 % virgin PET resin.  
<sup>2</sup> Compared to market incumbent of a 100 % virgin PET bottle. Assumption of 20 reuses for Refillable PET bottle and one-way PET bottle weighs 60 % less than a Refillable PET bottle.  
<sup>3</sup> Compared to market incumbent of a 100 % virgin PET bottle. Assumption of 20 reuses for a reusable 18g L Watercooler, one-way PET bottle



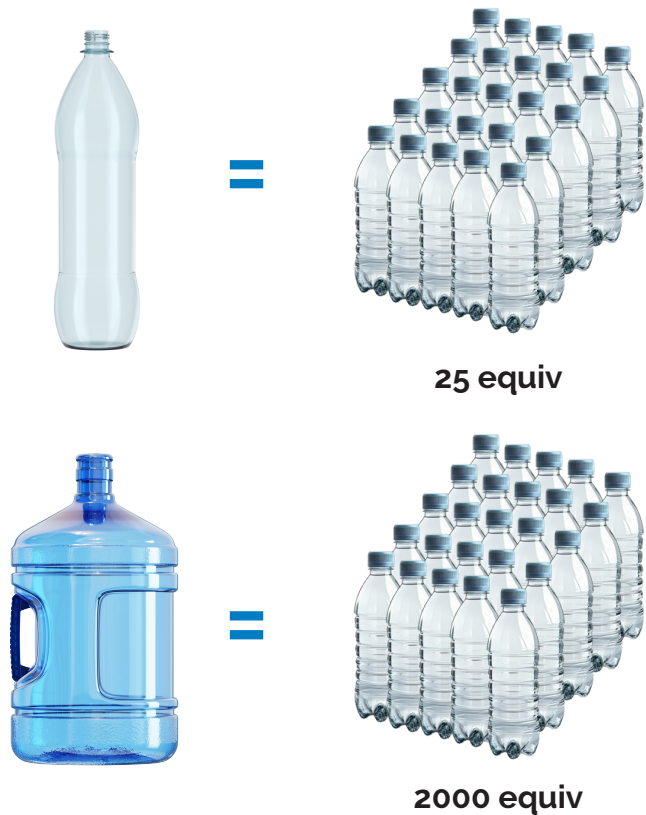
## Sustainability Reporting Lead Marie Milet

*"Reuse is consistently shown to be the most sustainable packaging material because it reduces material usage and avoids the manufacture of new packaging. Scope 4 allows us to understand the full benefit of these avoided emissions. The overall balance of our product mix is slowly skewing to increasing reuse, so we anticipate these avoided emissions to continue to grow."*

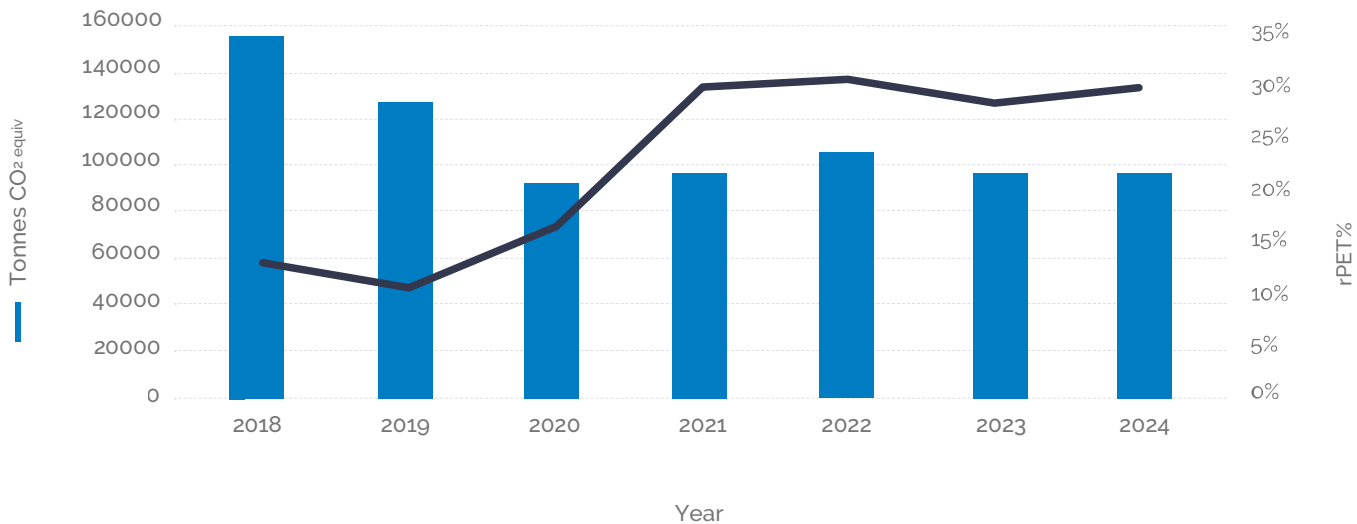
Avoided Emissions	Tonnes CO <sub>2</sub> equiv
rPET Usage <sup>1</sup>	36,720
Small Format Reusable PET <sup>2</sup>	295,157
Reusable Watercoolers <sup>3</sup>	200,875
Combined Resin Saving	213,021
Total Avoided Emissions	532,750

# Using Reusable PET Reduces Overall Plastic Consumption

Modelling 1000 L of product packaged				
Packaging Format	Product Weight	Reuses	Total Number of Containers	Mass of Packaging Required
1 L Single Use PET	30 g	0	1000	30 kg
1 L Returnable PET Bottle	62 g	25	40	2.48 kg
RELATIVE REDUCTION				92 %



## Change in Gross CO<sub>2</sub> Emissions & rPET Purchased Over Time



Petainer's gross CO<sub>2</sub> emissions have decreased by 32 % since 2018 and rPET purchased has increased from 14 % in 2018 to 37 % in 2024 of total resin purchases.



# Petainer Group

## Greenhouse Gas Emissions 2024

Petainer has made good progress against our Greenhouse Gas Emissions targets since 2018. The key driver for the increase in Scope 2 emissions is the energy mix at our USA sites, which was based on a grid mix for 2024. As of 2025 we are now bringing renewable energy online in our US manufacturing sites meaning, excitingly, that all Petainer operations sites as of 2025 will utilise renewable power. A shift to 100 % renewable energy is a huge step in reducing our impact as a producer.

	2018	2022	2023	2024	vs 2018 Baseline	Units
Scope 1	144	157	138	124	-20	Tonnes CO <sub>2</sub> equiv
Scope 2	30,559	1,288	510	1,151	-29,408	Tonnes CO <sub>2</sub> equiv
Scope 3	125,570	105,253	103,827	105,017	-20,553	Tonnes CO <sub>2</sub> equiv

## Energy Use

Petainer has been using 100 % renewable electricity at its core manufacturing sites in Czechia and Sweden since 2019. In 2024, 99 % of electricity used in Petainer's operations worldwide is from a renewable energy source, mainly hydroelectric, this compares to 10 % in 2018. As of 2025, Petainer's US sites will switch to renewable electricity supply, meaning all Petainer operational sites manufacture using renewable energy.

Year	2018	2019	2020	2021	2022	2023	2024
Renewable Energy	10%	96%	99%	98%	97%	99%	99%

# Legislation Updates

## Packaging and Packaging Waste Regulation

The European Union has confirmed the Packaging and Packaging Waste Regulation (PPWR), representing a landmark step toward reducing packaging waste and increasing sustainability. A shift to reuse is one of the focuses of the legislation, with clear targets for the increase of reuse within the packaging mix for beverages. As the EU pushes toward a circular economy, the PPWR sets out clear rules that will reshape the beverage industry, moving it to a dual system of single-use plastics and reusable packaging.

The PPWR legislation marks a significant shift toward a circular economy in the beverage sector, with an emphasis on reusable packaging. The key provisions of the PPWR—such as the promotion of reusable beverage bottles, Deposit Return Schemes, and the design for reuse—are crucial steps in reducing plastic waste and improving sustainability.

The law sets ambitious targets for both reuse and recycling. For beverages, it specifies that **10 % of beverages must be available in reusable packaging by 2030.**

This is set to increase to 40 % by 2040, though this figure will be confirmed once data from the 10 % phase is analysed. Beverages included in the reuse targets include mineral water, carbonated soft drinks and beer, but exclude dairy, wine and spirits.

The onus of the legislation is placed on the retailers to deliver the reuse target but will not be allowed to do so with their own brands alone, opening up reuse to all brands. For beverages, reusable PET bottles have been used successfully for years in South America and Germany. Being lightweight compared to their glass equivalents, they are easier to transport and generally preferred by consumers buying in bulk.

Member states will need to take measures to encourage the set up of systems for reuse with sufficient incentives for return, whether it is a Deposit Return Scheme, financial incentive or otherwise. This is key to ensuring that the investment made in reuse by both retailers and brands will be worthwhile, and consumers will understand the benefits of reuse.



*The EU has pushed hard for reusable packaging to be a focus of the legislation because it has been proven time and again that reuse can reduce the carbon footprint, material usage, water usage and cost for brands and consumers.*

## Bisphenol A Ban

The recent EU regulation on bisphenol A (BPA) introduces specific timelines for the transition to compliance. Below are the key dates and provisions outlining the phased implementation of the BPA ban for food contact materials:

1. Finished reusable food contact articles including polycarbonate watercooler bottles manufactured using BPA can be placed on the market up until the 20th July 2026.
2. Finished reusable food contact articles including polycarbonate watercooler bottles that were first placed on the market by the 20th July 2026 can remain on the market until 20th January 2029 at the latest.



Petainer has continued to invest in sustainability at site level, working with ClimatePartner to certify our site in Lidköping, Sweden. ClimatePartner certification is conferred upon fulfilling five essential steps: calculating carbon footprints, setting reduction goals, implementing reduction mea-

sures, financing climate projects, and maintaining transparent communication. Described by ClimatePartner as placing higher demands on climate action engagement, mandating the establishment of reduction goals and long-term strategies, Petainer has achieved this certification.





# Products Designed for Recycling

## Our People

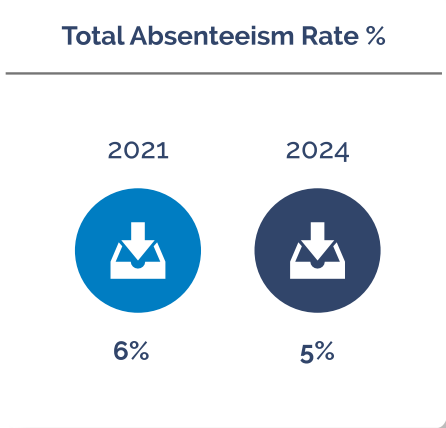
Petainer strongly believes that the people working throughout the business are at the core of its success as a Company. Employee satisfaction is driven by development, engagement and support, where Petainer Employees can feel motivated to progress within the Company. With an open culture, where ideas can be formed at site level through to the boardroom, Petainer seeks to attract best-in-class team members to ensure we stay at the cutting edge of our industry.

2024 saw our overall workforce increase once again, as Petainer readies itself to meet demand to 2030. An engaged workforce and focus on safety have shown through, with a higher retention rate, fewer accidents and an increase in replies through our engagement survey. Our factory floors are the center of our business, where the sustainability practices we outline are implemented.





Metric	2021	2022	2023	2024
Total Employees	273	301	338	340
Total Net New Hires	3	29	35	24
% Employee Turnover	14	26	18	14
% Female Employees	25	28	28	27
Total Absenteeism Rate %	6	5	4	5
Work Related Injuries <small>Including minor issues</small>	25	29	29	25



# Employee Survey

In November of 2024, Petainer launched its first ever Global Employee Survey. This was the first instance in which all Petainer Employees responded to the same question set. The 2024 results will provide a global baseline looking at 4 key categories:

- Workplace conditions
- Skills and Personal Development
- Management
- HR, Health and Safety

**Total completion rate was 73 %.**  
Across the group, we were pleased to see 78 % of Employees scored overall satisfaction working for Petainer in the highest score band.  
With open questions, it was also good to see the level of interest shown by Employees in how to improve not just their individual sites, but business processes.  
Each site has created an Action Plan to enact in 2024, each having tangible goals to deliver before we undertake the survey again at the end of the year. We want to thank all our Employees who took the survey and reiterate our commitment to you all.



## Organisations Supported

### New Era (European Reuse Alliance)

Petainer are a member of New Era. New ERA is the trade association representing the interests of businesses that offer, use and promote reusable packaging systems, services and products across Europe. Their aim is to move away from disposability and become truly circular and zero waste. They envisage a world of packaging which is reusable, convenient and sustainable for all. The reuse packaging value chain is composed of a heterogeneous group of operators involved in different activities (e.g. manufacturing, delivery, logistics, infrastructure, transport, digitalisation, washing and cleaning) and sectors (e.g. HORECA, FMCG, e-commerce).

As a packaging producer, our work with New Era is in the advocacy of reusable PET beverage bottles across Europe and the Americas.

### Petcore Europe

Petcore Europe is the association based in Brussels representing the complete PET value chain in Europe, from PET manufacture to conversion into packaging and recycling and other related activities. The association is at the forefront of working with all stakeholders to ensure the sustainable growth of PET as a packaging material of choice, and also to further increase post-consumer PET collection and recycling. We are communicating with the European institutions about the importance of the PET value chain, especially as PET is significantly contributing to the Circular Economy. Petainer is in the Reuse Working Group, which advocates for PET reuse across Europe.

### Sustainable Wine Roundtable

Sustainable Wine Roundtable (SWR) unite wine businesses to tackle shared issues, build an evidence base for action, save money, and create meaningful change. With over 130 members spanning the entire wine value chain—from growers and producers to retailers, standards owners, packaging suppliers, academics, and more—SWR is leading the way in fostering collaboration and catalysing change in the wine sector.

Petainer joined the Sustainable Wine Roundtable in 2024 & participated in the 'Great Packaging Debate on Carbon'. Petainer's solutions for the wine industry, kegs and wine bottles, are designed to decarbonise the wine market by substituting heavyweight materials for glass.



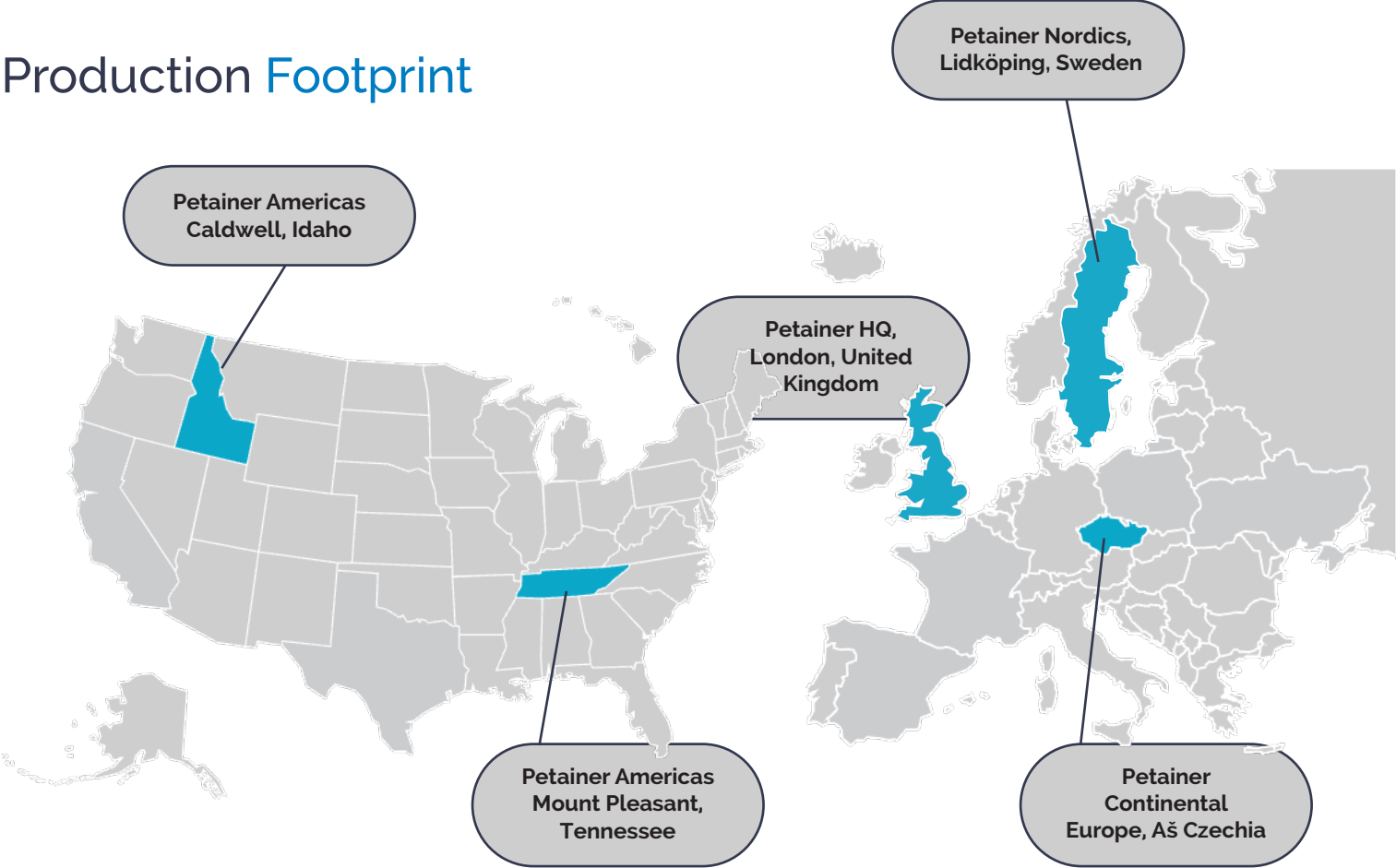
# Bespoke & Off-the-shelf Flexibility

# 2024 Site Progress

## 2024 Sustainability Progress

Petainer Continental Europe AŠ, Czech Republic	27
Petainer Americas, USA	33
Petainer Nordics, Lidköping, Sweden	39

# Production Footprint







# Highest Standards for all Products

## Petainer CE



Craig Pope, Managing Director Petainer Continental Europe

### Key Facts

- Founded 1996
- Services Continental Europe
- 160 Employees
- Produces reusable PET, Kegs, Watercoolers

I've been the Managing Director for Petainer Continental Europe for 2 years. Based in Aš, Czechia, our Continental Europe site is a vibrant, forward-thinking factory with employees who are experienced in delivering top quality packaging solutions for our customers.

As our Central European manufacturing centre, we are well placed to service the European market, from Spain to Greece and everything in between. Our product mix offers carbon reduction solutions for beer, mineral water, and soft drinks. It is here that we make our refillable portfolio; small format refillable bottles and Watercooler bottles. Not only are these products proven to reduce carbon emissions compared to glass, aluminium and single use, but they also contribute towards avoided emissions, also known as Scope 4. With our small format reuse used up to 25 times and large format 40 times, there is a significant benefit here.

For our employees, we offer a range of perks, from ski passes to language courses, to ensure that they feel fulfilled.



Petainer  
Continental  
Europe

# Sustainability Progress

## EcoVadis Platinum

Petainer Czech Republic is proud to announce that it has been awarded the prestigious Platinum EcoVadis medal for its exceptional performance in corporate sustainability. This recognition places Petainer in the top 1% of companies globally for sustainability.

This is the first time Petainer Continental Europe has been awarded a Platinum medal and shows the dedication from the team in ensuring transparent sustainable manufacture.

"We are delighted to receive this recognition from EcoVadis, which reflects our ongoing commitment to sustainability," said Craig Pope, Managing Director, Continental Europe. "Through the hard work of the team over the last few years we have brought our score up from a Bronze to a Platinum in an increasingly hard-fought category. At Petainer, sustainability is not just a goal, it is at the core of everything we do—from the innovative design of our single use and reusable portfolio."

Petainer Aš has been committed to reducing its environmental impact. The factory was moved across to 100 % renewable energy in 2019, cutting emissions substantially.

This recognition builds on Petainer's growing reputation as a leader in sustainable packaging, offering lightweight, cost-efficient solutions which meet the highest industry standards. Petainer remains committed to driving positive environmental and social change while delivering superior packaging solutions for its clients worldwide.

This achievement reinforces our dedication to creating products that reduce waste, minimise carbon footprints, and promote a circular economy. It is testament to the hard work of the team over the last year to implement the correct practices and lead by example.



## Reuse as a % of Sales

27 % of the resin purchased as a group was bought to be converted into reusable products. Until we opened our sites in America, Petainer Continental Europe was the main manufacturing site for reusable products for Petainer. Situated ideally only minutes from the German border, we have supplied small format reusable bottles for soft drinks and mineral water for decades. In that time, our team of reuse experts have extended the life of reusable bottles up to 25 times, and incorporated reusable PET content.

Legislation in the EU will drive reuse further, with all countries requiring reuse by 2030, and we know that the expertise developed among our team will make the transition seamless for countless brands as they adopt reuse for the first time.

# Employee Focussed



Language courses for all Employees



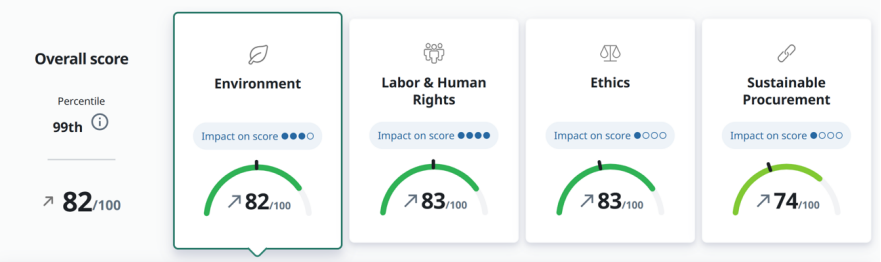
Subsidised canteen



Free ski passes every year

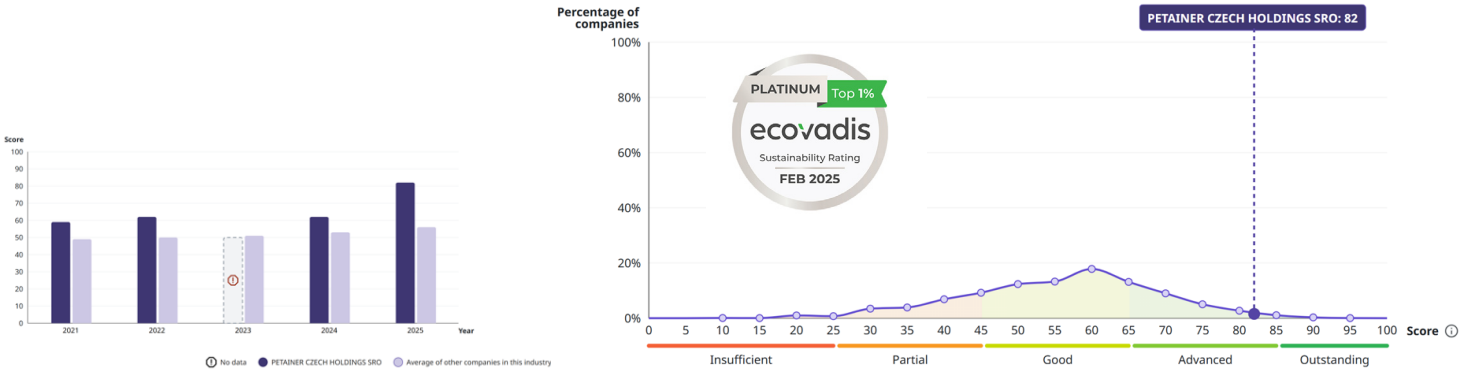


Online expenses platform & Employee engagement system



EcoVadis is a platform with which hundreds of thousands of companies collaborate on a common platform, universal scorecard, benchmarks and performance improvement tools. With a common framework, brands look to increase their score across 4 key areas: Environment, Labor & Human Rights, Ethics and Sustainable Procurement.

Petainer Aš site awarded a **Platinum Medal**, placing it in the “Advanced” Category and the 99th percentile



# New from Continental Europe

## 11, 13 L Watercooler Bottles

The share of reusable products manufactured at our Continental Europe site has increased year on year. The Watercooler market, impacted by the EU BPA ban has caused a shift to PET. Flexibility in blow moulding allows us to create different sizes to react to market needs. Smaller formats for older end users, or smaller offices lead to the creation of an 11 and 13 L Watercooler. Designed to work on standard dispense equipment, but is significantly easier to handle.



## Standard Reusable PET

As the PPWR legislation comes into force, many more brands will need to enter the reusable packaging space. Our new standard range reusable bottles are a low capex entry to reuse, with 25 reuses, and a standard off-the-shelf design to reduce cost to entry.







# Employee- First Culture

## Petainer Americas



Chris McEwan, President, Americas

### Key Facts

- Founded 2022
- Services North and South America
- 50 Employees
- Produces reusable PET, Kegs, Watercoolers

Petainer Americas sites are the newest in Petainer's global manufacturing footprint. Our sites here have been designed to meet the need for small and large format PET products in the beer, wine, coffee and soft drinks sectors.

All of our products are proudly Made in America, with American resin. This allows us not only to protect our customers from global market volatility, but support manufacture in America and focus on reducing carbon footprints.

#### Mount Pleasant, Tennessee

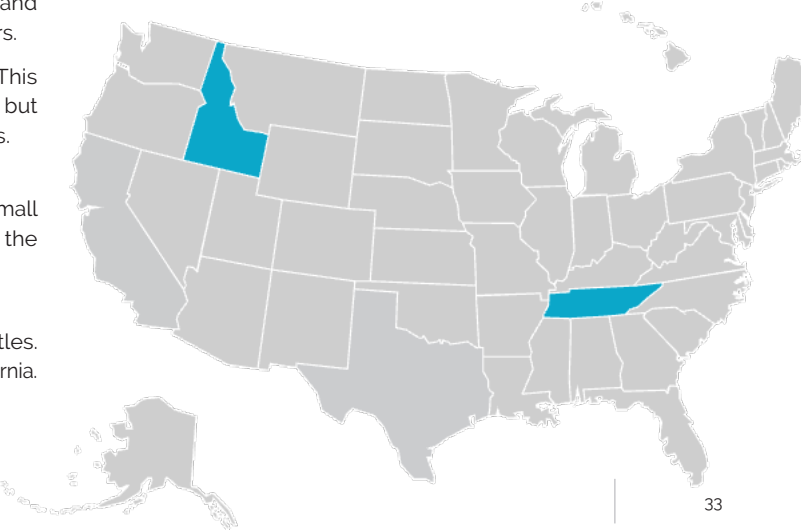
Focuses on the manufacture of Watercooler bottles and preforms and small format bottles for soft drinks, mineral water and wine & spirits. Supplies the east of America and South America.

#### Caldwell, Idaho

Focuses on the manufacture of large format Kegs and Watercooler bottles. Supplies the west of America and manufactures for Asia supply through California.



Petainer Americas



# Sustainability Progress

## Sharing Reuse Expertise in Americas

Reuse has been the cornerstone of our manufacturing footprint since the 1990s, when we supported the German beverage market in transition to a mixed one-way and refillables market. Since then, we have brought to market large container refillables in the form of our PET Watercooler Bottles. Petainer's Returnable PET bottles and Watercooler Bottles are the ultimate sustainable packaging solution, reducing both greenhouse gas emissions and material use. Returnable PET bottles can achieve up to 25 uses and Watercoolers up to 40 uses. This spreads out the greenhouse gas emissions of production over each reuse and uses the material for one container multiple times. Reuse is becoming ever more important, with powerful legislation in the EU mandating beverage packaging reuse from 2030, and the green shoots of reuse in North America encouraged by an existing flourishing South American market.

Petainer's reusable products encourage the return of containers to designated points where they are sent for recycling when rejected from the bottle/container pool. This serves to reduce plastic waste and reinforces the idea that plastic is a resource with value, which can be reused/recycled, not wasted.

## Sustainable Material Choices

Material choices are the key driver for packaging sustainability success. The North American beverage packaging model relies on overseas imports of glass made unsustainably abroad. Domestic made PET products can support the decarbonisation of the American packaging industry. Across all markets we supply; wine and spirits, beer, coffee, soft drinks and mineral water, we have a solution which can be simply integrated into existing systems to make sustainability simple and low cost.

## Widening the Recycling Capabilities in USA

Petainer's products are designed with recyclability in mind to ensure they can be accepted into existing recycling systems. This requires a careful analysis of the PET and the additives sometimes used, as well as an understanding of current and future legislation.

Petainer's one-way and returnable small containers are returned to deposit return systems/bottle bills or collected via kerbside recycling where they can be recycled in bottle-to-bottle waste streams, ensuring this high-quality material remains in the circular economy.

For larger containers, Petainer's Watercoolers are made of 100% PET and allow for easy recycling after grinding of the product. Petainer's Kegs can be easily dismantled into separate waste streams to recover the maximum amount of recyclable and reusable material from the product.

# Employee Focussed



Top Tier Health Insurance



Hiring local workers



Online expenses platform & Employee engagement system



# New from Americas



## Standard Range Liquor Bottles

In late 2024, Petainer Americas launched a range of PET spirit bottles to the market. The United States and South American countries have booming spirits industries, servicing both domestic and export markets.

Available in 0.375 L, 1 L and 1.75 L, they are designed to provide a glass-like design and feel. Aimed at the value and standard range segment, PET offers spirits producers an easy way to reduce their carbon footprint and costs. Glass price uncertainty and import pressures make domestic supply easier.



## Introducing PET Wine Bottles

American wineries, due to market conditions, are often required to buy in glass from abroad, buying from glass factories that are less sustainable and opening themselves to market volatility. PET wine bottles offer a sustainable solution for wines made for early drinking, which is true for all but 15% of wines made.

As one of the great wine producing nations, having domestic PET wine bottles offers wineries choice on how they address their carbon impact.



## Bringing More Reusable PET to Americas

South America is one of the leading areas for reuse Globally. Small format for soft drinks is available across South America with reusable PET an essential component of the system. Petainer has invested in capacity for small format reuse to supply South America and the nascent United States Reuse market.

Large format reuse is more consistently available. With traditional polycarbonate (PC) coolers the standard in the market, PET is rapidly taking over due to fears around BPA in PC coolers.





# Petainer Nordics

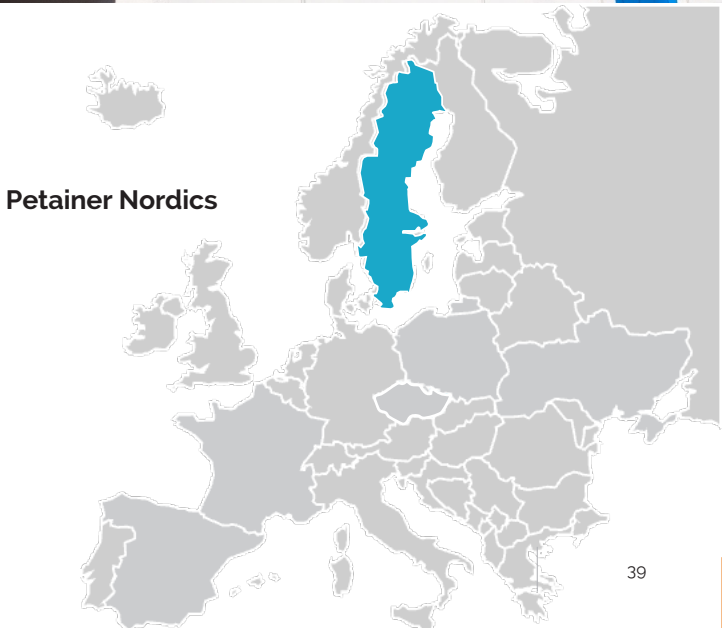


Stephen Smith, Managing Director Petainer Nordics

## Key Facts

- Founded 1983
- Services Nordics and Northern Europe
- 90 Employees
- Produces Preforms, Blown Bottles

Lidköping is the oldest Petainer location, starting operations in 1983. We're ideally located in central Sweden and supply the entire Nordic region with high quality preforms and bottles. The Nordics have long been associated with effective plastic waste management, with deposit return schemes consistently delivering high return rates and feedstock of the quality needed for food contact products. This has meant that at Lidköping, our team has become experts in adding recycled PET to our products, up to 100 %. We have supported leading brands in shifting to increasing percentages of rPET in their products, supporting a regional reduction in carbon emissions. Our team here is a blend of long-term expertise, with many over 10 and even 20 years of service, through to temporary staff in the summer coinciding with the holiday season. Ingrained in all is a safety focused culture, of which I am pleased to see ever reducing instances of workplace accidents. Lidköping is a small town, making our factory a major employer in the region.



# Sustainability Progress

## EcoVadis Gold

Petainer Nordics have submitted to EcoVadis since 2020 and have consistently performed above comparable companies in our sector. The breadth of EcoVadis, covering 4 key areas: Environment, Labor & Human Rights, Ethics and Sustainable Procurement means that it provides an in-depth analysis of the Company.

A Gold Score places Petainer Nordics in the 'Advanced' Category, a reflection of the consistent work put in at site level to ensure that we manufacture in a transparent, sustainable way.



## Renewable Energy

Petainer Nordics is located in Lidköping Sweden, on the bank of the largest lake in Sweden. A picturesque site which is a common holiday area for Swedes. Sweden is blessed with a wealth of renewable energy sources, and Petainer Nordics have taken advantage of this, running the site with hydro electricity since 2018. The result of this is reduced Scope 2 emissions, and no CO<sub>2</sub> emitted during production at this site.

## Focus on Safety

ESG does not just focus on carbon emissions reduction, but also on the welfare of Employees and end consumers. At all of our sites, the safety of our Employees is a must, and regular training is an essential part of a consistently low incidence of injuries, especially those in the serious category. Each year, the team is run through a set of training modules to refresh best practice and reinforce our company policy.

# Employee Focussed



Leading Safety Focused Culture



Subsidised canteen

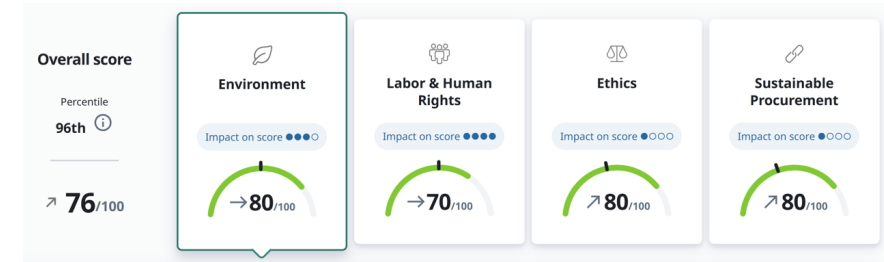


Access to tickets to local Bandyklubb team



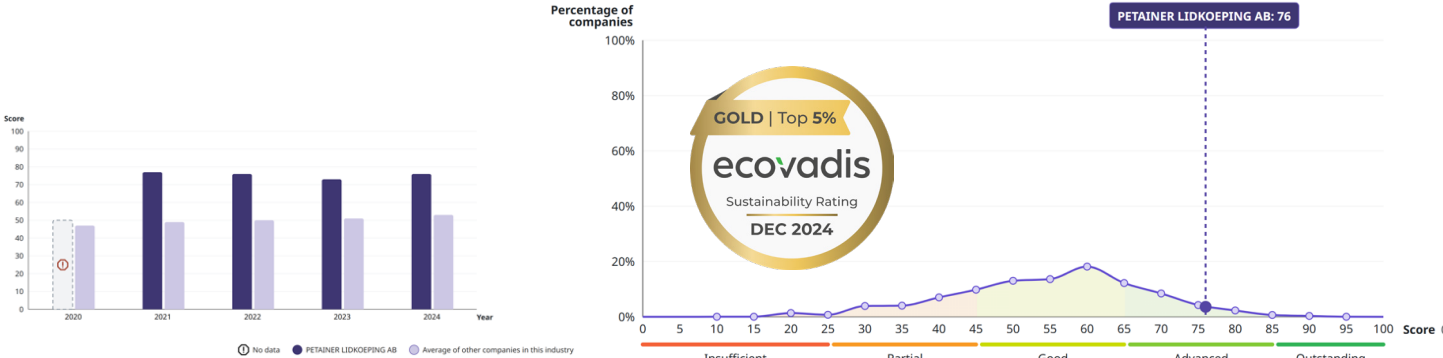
Online expenses platform & Employee engagement system

## EcoVadis - Lidköping



EcoVadis is a platform with which hundreds of thousands of companies collaborate on a common platform, universal scorecard, benchmarks and performance improvement tools. With a common framework, brands look to increase their score across 4 key areas: Environment, Labor & Human Rights, Ethics and Sustainable Procurement.

Petainer's Lidköping site awarded a **Gold Medal**, placing it in the "Advanced" Category and the 99th percentile



# New from Nordics

## Premium Range Liquor Bottles

The Nordic markets, because of their sophisticated Deposit Return Scheme are ahead of other markets with PET collection and acceptance. The Spirits market required something to elevate the product beyond simple PET bottles, which is why we introduced our Premium Spirit Bottle to the market. Producers now have an option to enter not just the value segment, but a step above with their Spirit portfolios.



## Rosé Wine Bottle

The Swedish return scheme for PET beverage bottles restricts the use of clear bottles for wine. Most Rosé wines are packaged in clear bottles because many customers will choose a rosé based on its colour. To get around this issue, we have added a pink tint to our bottles, allowing it to be used for Rosé wine. This gives wine producers in the Swedish market the chance to bottle Rosé in a bottle that shows off the colour, encouraging purchase.



Petainer sponsors local Bandy team Lidköping Villa Bandyklubb with our logo placed under the ice. Employees are given access to tickets to support the team at home games. In the 2024/2025 season, the Men's, Women's and U21 teams won the championship.



# Production Emissions of Petainer's Product Portfolio

	1.7x less carbon	6x less carbon	3x less carbon	3x less carbon	12x less carbon
					
	Reusable PET Watercooler Bottle	One-way Keg	Reusable PET Bottle	One-way PET Bottle	Preforms
Factory Gate Emissions (per unit unless specified)	Per kg material PET: 2.2 kgCO <sub>2</sub> e.	4.31 kgCO <sub>2</sub> e.	0.1093 kgCO <sub>2</sub> e.	0.0357 kg kgCO <sub>2</sub> e.	0.0083 kg kgCO <sub>2</sub> e.
Competing Substrate	Per kg material Polycarbonate: 3.79 kgCO <sub>2</sub> e.	Steel Keg: 26.68 kgCO <sub>2</sub> e.	Refillable Glass bottle: kgCO <sub>2</sub> e.	500ml Aluminium can: 0.10609 kg kgCO <sub>2</sub> e.	500ml Aluminium can: 0.10609 kg kgCO <sub>2</sub> e.