WE PROMOTE THE CIRCULAR ECONOMY BY FACILITATING THE CIRCULATION OF MATERIALS IN SOCIETY

OUR SERVICE LINES

Circular economy services
- Waste management
- Recycling
- Product trade
- Advisory services

Renewable energy sources

EMPLOYEES: 1,450
Our net sales have grown steadily in both circular economy services and in renewable energy sources. Profitability has been kept strong, and further improved especially in the renewable energy sources service line. Main customer segments are Industry, Public sector and Trade and Logistics, which together bring two-thirds of our revenue.
# OUR OPERATING ENVIRONMENT

## DIGITALISATION
Expedites process efficiency improvements, the development of the customer experience and new data-driven business

## THE CIRCULAR ECONOMY TREND
The growing demand for renewable solutions enables the development of new businesses and expansion in value chains

## SUSTAINABILITY REQUIREMENTS
The strategic significance of sustainability will increase as reporting requirements expand to include investors in addition to companies

## CHANGE IN WASTE OWNERSHIP
Larger role for municipalities in household waste management

<table>
<thead>
<tr>
<th>MAIN MARKET</th>
<th>RELEVANT MARKET SIZE</th>
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</thead>
<tbody>
<tr>
<td>WASTE MANAGEMENT AND RECYCLING</td>
<td>RENEWABLE ENERGY SOURCES</td>
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<tr>
<td>#1</td>
<td>#6</td>
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</tbody>
</table>

## ANNUAL MARKET GROWTH

<table>
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<tr>
<th>WASTE MANAGEMENT AND RECYCLING</th>
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<tr>
<td>0–3 %</td>
<td>5 %</td>
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## RELEVANT MARKET SIZE

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<td>1.2 BEUR</td>
<td>0.8 BEUR</td>
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SUCCESS IN B2B-BUSINESS HAS COMPENSATED FOR THE LOST BUSINESS IN MUNICIPAL HOUSEHOLD WASTE MANAGEMENT

The losses in household waste management and recycling have already been compensated by additional sales in the B2B-business.

GROWTH IN SHARE OF B2B-BUSINESS
Share of net sales in circular economy services

COMPETITIVE SITUATION
Operating margin-%

The size of the sphere depicts the size of the competitor (EUR million)
WE CONTINUE TO EXECUTE OUR STRATEGY FOR FUTURE SUCCESS

CUSTOMER EXPERIENCE
The use of digital service channels has increased by 20%

SERVICE DEVELOPMENT
New services have been grown from zero to EUR 2 million in net sales

PROFITABILITY
The fleet utilisation rate has been increased by 6%

CUSTOMER SATISFACTION
Investments in the customer experience have increased customer satisfaction NPS 25

EMPLOYEE SATISFACTION
The personnel have been prioritised as a core element of the strategy 81% employee promoter score
EXAMPLES OF PRACTICAL ACTIONS TO PROMOTE THE CIRCULAR ECONOMY

CLOSED LOOPS
We create closed loop services related to plastic recycling and pallets, for example.

SUSTAINABILITY SERVICES
We help our customers compensate for the CO₂ emissions of waste treatment and achieve their recycling targets.

RENEWABLE RAW MATERIALS
We produce renewable raw materials for the growing needs of the energy and forest industries.
THE LATEST CIRCULAR ECONOMY SERVICES

- Helpponouto
- Hävikkimestari
- Carbon-neutral waste management

Online training

Ympäristönetti

Environmental management

MODERN SERVICE CHANNELS

- Oma L&T
- Recycling robot Kikka
- Raksanappi

DATA-DRIVEN MANAGEMENT

- Efficiency and performance indicators
- Reducing emissions
- Real-time monitoring
MANY PROMISING ORGANIC GROWTH PATHS AVAILABLE

- Growth investments in materials treatment
- Development of new circular economy services
- The market for renewable energy sources is expected to grow
- Increasing the market share in municipal contracts
- The recycling market is expected to grow due to tightening environmental regulation
WE CREATE MORE VALUE WITH CIRCULAR ECONOMY

Fulfilling customers’ recycling and sustainability goals with the best services in the market

Investing into new circular economy solutions – realising the growth potential of the megatrend

Many promising growth opportunities identified, especially in the market for renewable energy sources