tosca®

HIGHLIGHTS

2026

SUSTAINABILITY REPORT

All together better

Packaging as a strategy: Shared success











Overview

Welcome to Tosca's 2026 Sustainability Highlights Report.

This report is designed to highlight the actions taken and improvements made over the last year to further the sustainability of our business. The full story of our 60-plus-year sustainability journey and how Tosca continues to grow is presented in our 2026 Sustainability Report, which provides in-depth information on how we are placing sustainability at the heart of our services, operations, and business strategy.

Data presented in this report is for 2025 unless otherwise stated.



What's inside

About Tosca

A word from the CEO 3
2025 highlights 4
From our regional presidents 5
About us 6
Eliminating waste at every turn 7

Together in customer partnership

Together in customer partnership 9
Eliminating waste at every turn 10
How reusables eliminate waste and reduce the total cost of ownership 11
Innovation in action 12
Meeting PPWR head first 14
Proving our case 16
Closing the loop on food and material waste 17
Designed to protect 18
Keeping products safe from farm to shelf 19
Protection during use 20
Optimizing for labor and space savings 21
Space savings 22
Automation ready 23
Enhancing efficiency 25
Data management by the numbers 26
Advancing customer sustainability goals 27

Together in operational excellence

Our 2030 target 29
Together in operational excellence 30
Calculating our carbon footprint 31
Eliminating waste at Tosca 32
Recycling what remains 33
Creating a more responsible supply chain 34
Logistics 35

Together in team engagement

Together in team engagement 37
Building a passionate workforce 38
Developing and engaging our team at every turn 39
The place people want to stay 40
Recognizing our team members 41
Celebrating our people, recognizing passion 42
Pursuing our 'safer together' journey 43
Eliminating risk at the source 44
A neighbor who cares 45
A word from our global head of sustainability 46

A word from the CEO

I am proud to share Tosca's 5th sustainability report and our progress in advancing sustainability while delivering measurable customer value. Sustainability continues to be embedded in our business model, innovation strategy, and commitment to helping organizations eliminate waste, reduce costs, and prepare for a circular economy.



Our circular pallet, designed in conjunction with Cabka, launched early in 2026. Manufactured from 100% recycled material, it diverts a waste stream from landfill and helps reduce transportation-related emissions. Its lightweight, consistent, and robust design supports efficient handling and overall operational performance. The lightweighting, along with its consistent size and robust nature, improves overall operational efficiency. And, like all our newly manufactured assets, it is fully RFID-enabled, enhancing traceability, asset utilization, and supply chain visibility.

Focused operational improvements internally delivered a 30% reduction in global Scope 1 and Scope 2 emissions intensity since 2021. In North America, ethnic minority representation in wash center management increased by 12%. We also maintained our ISO 22000 Food Safety Management System certification with zero findings for the 6th consecutive year, reaffirming our commitment to food safety and operational excellence.

In EMEA, we achieved EcoVadis Gold status, again placing Tosca among the top 5% of organizations globally. Our reusable packaging solutions fully comply with the August 12, 2026 requirements of the EU Packaging and Packaging Waste Regulation, complementing our existing compliance with its requirements for reuse systems, recycled content, and reusability.

Tosca reusables also supported customer compliance and fee reduction under Extended Producer Responsibility programs in EMEA and North America. These savings strengthen our total cost of ownership approach, which measures the operational and environmental costs and benefits of packaging choices. Our "white glove" pilots validate these improvements, with over 90% converting immediately to full pooling programs.

Looking ahead, our revised 2030 goals—shaped by a robust reassessment of sustainability opportunities and risks—set a clear 5-year direction. As Tosca moves forward under Goldman Sachs Alternatives ownership, whose 4 key investment pillars include Circular Economy and Transportation & Logistics, the value of our role in building efficient, resilient, circular supply chains is clear.

I am confident in our momentum and deeply grateful to everyone supporting our mission of eliminating waste at every turn.



Eric Frank
CEO

2025 highlights

Eliminating waste at every turn

30%
reduction in Global Scope 1 and 2 emissions intensity by operating hours

6th
consecutive year of zero major non-conformance on US ISO 22000 Food Safety Management System

~12%
increase in ethnic minorities in management positions in US operations

30%
recycled food-grade plastic in all new UK products

100%
new products RFID tagged

Gold EcoVadis

Certification for Europe, the Middle East, and Asia (EMEA) operations for the 5th year in a row

Learning Together

career development program launched

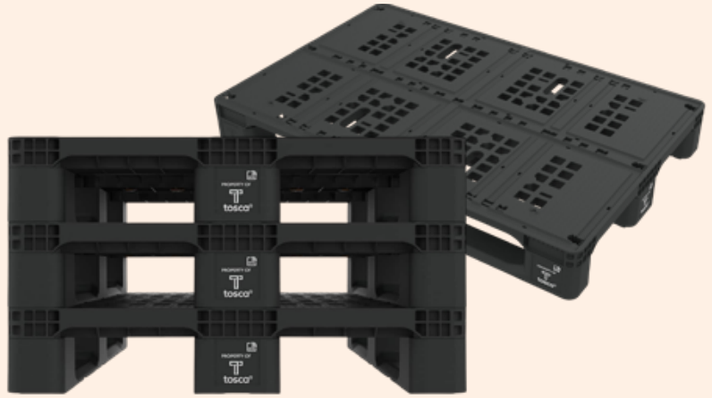
Smart assets and digital traceability

capabilities are embedded in all new products



INTRODUCING

CP 1208 Circular Pallet



Built for where regulation and automation are heading:

- Made from 100% recycled plastic
- Compatible with existing European pallet handling equipment, no retrofits required
- Lightweight and robust construction for easier, safer handling
- Washable, RFID-enabled, and designed to be repaired, reused, and recycled within a pooling model
- Developed in partnership with Cabka and built to meet Packaging and Packaging Waste Regulation (PPWR) and Extended Producer Responsibility (EPR) requirements from day one

Cabka

From our regional presidents



How has Tosca's sustainability commitment driven regional success, and what specific challenges or opportunities have you addressed since 2025?

Steve Arendsen,
President of North America



Since 2025, our sustainability commitments, cost management, and commercial propositions have continued to converge.

Single-use products are increasingly difficult to defend from a total cost of ownership perspective and against expanding US EPR legislation.

Internally, our wash centers grew more efficient, keeping pooling costs competitive.

Our Asset IQ™ platform is providing the traceability and near real-time data major retailers now demand as part of their ramp-up to FSMA 204 compliance. And we are building on the urgency around automation, positioning our RPCs, bulk bins, and pallets as essential for the standardization that enables successful automation programs.

Looking to 2027, we see retailer-driven traceability requirements intensifying, and we are strongly positioned to support suppliers needing end-to-end visibility for supply chain management, regulatory compliance, and total cost of ownership reduction. The automation conversation is also expanding. Our reusables provide the consistency that corrugated cardboard systems cannot match.

Laurent Le Mercier,
EMEA President



The 2025 entry of the PPWR fundamentally changed our customer conversations in Europe, formally establishing pooled reusables as a preferred alternative and accelerating decision-making.

As EPR fees kick in, our PPWR-compliant pooling service is providing a clear financial advantage for customers over single-use alternatives. In 2026, we are focused on expanding the knowledge of EPR financial benefits and contributing to the benefits of reusable transport packaging as part of the expected EU Circular Economy Act.

Maintaining EcoVadis Gold certification for the 5th year running shows our commitment to sustainability across EMEA. Operationally, we reached a major milestone by transitioning to 100% electric forklifts, eliminating a direct emissions source. We also aggressively tackled asset tracking and traceability across our wide range of assets to support the future requirements of the PPWR.

We are also advancing data collation and developing digital passports for our asset portfolio, allowing customers to easily demonstrate compliance and sustainability metrics, ensuring we remain an essential partner for customers navigating these evolving PPWR-related requirements.

About us

Tosca is a global leader in reusable packaging, delivering pooling solutions and sold assets, which are purpose-built to eliminate waste throughout the food supply chain.

Our mission

To revolutionize the flow of goods through the food supply chain, eliminating waste at every turn.

Our values

Passion, Appreciation, Collaboration, Expertise, Customer-focused, Reliability.

Delivering supply chain solutions, from the first mile to the last

Pooling involves sharing reusable assets like RPCs, plastic pallets, and bulk containers across our customer base. Tosca manages the entire process, including collection, washing, servicing, and delivery, to ensure sustainable and efficient use of resources.

Tosca in numbers

5,000+ customers

1,479 team members

66+ years of experience

60+ locations worldwide

60+ countries

300+ injection molding tools

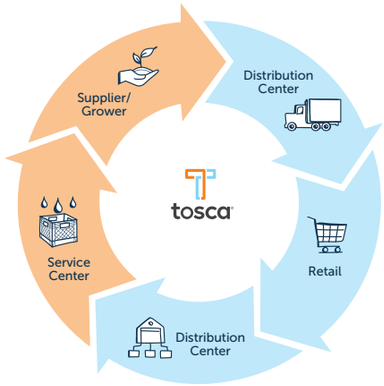
500 million assets

Industries we support

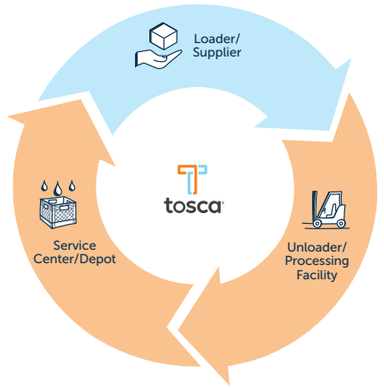
- Meat
- Eggs
- Fruit and vegetables
- Beverages
- Dairy
- Fish
- Food ingredients
- Pet food
- Food service
- Packaging and labeling
- Textiles
- Healthcare and pharmaceutical
- Chemicals
- Automotive

You can find more detailed information in our 2026 Sustainability Report

Open-loop pooling



Closed-loop pooling





Eliminating waste at every turn

A strategy for collaborative, sustainable success

Packaging decisions create ripple effects up and down the supply chain:

- How much product reaches the shelf undamaged
- How well an automated line runs
- How easy is it to handle, pack, and unpack
- How many truck journeys it takes to move a load
- How quickly a traceability audit can be completed
- What ends up in a landfill at the end of a delivery cycle

Responsibility for outcomes sits across departments, spans different P&Ls, and is measured differently by different teams. Each element influences total cost of ownership (TCO). TCO looks beyond packaging as a line item to the monetary, environmental, regulatory, and social costs associated with it and is a core focus for Tosca.

Our overarching goal is to eliminate waste across the board and reduce TCO. Our sustainability strategy is key to helping achieve this both internally and for our customers.

In 2025, we performed our first Double Materiality Assessment (DMA), which updated our 2021 materiality assessment, along with a formal climate risk assessment. Both have been used to refine our existing sustainability strategy and realign our 2030 goals.

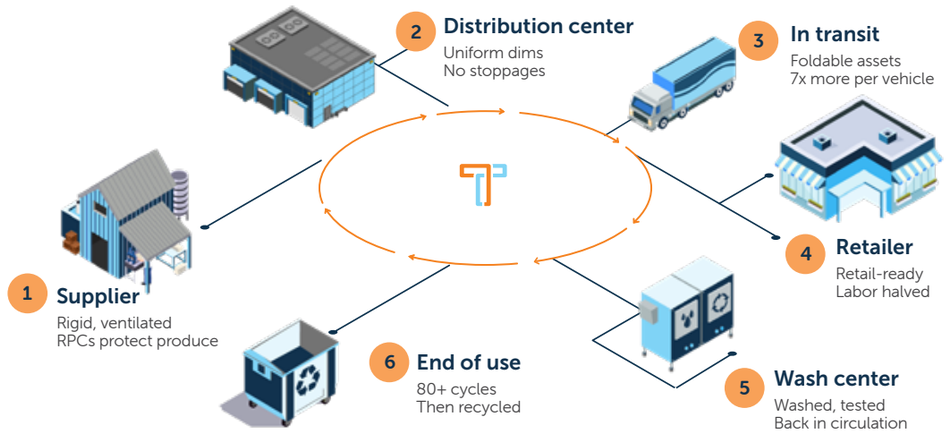
Where we are focused, and why

Our DMA brought together financial and sustainability impacts. It affirmed the direction we had already been heading and underscored clear priorities.

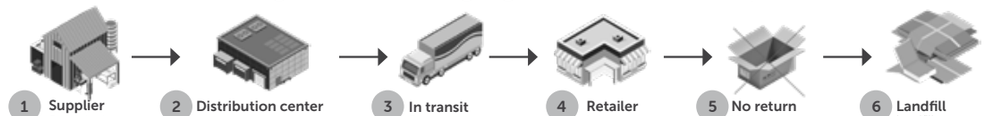
These areas also align with Tosca-relevant United Nations Sustainable Development Goals, reflecting our belief that eliminating waste at every turn is not just good for business but is also good for the world.

- **UN SDG 2:** Zero Hunger
- **UN SDG 4:** Quality Education
- **UN SDG 5:** Gender Equality
- **UN SDG 6:** Clean Water and Sanitation
- **UN SDG 7:** Affordable and Clean Energy
- **UN SDG 8:** Decent Work and Economic Growth
- **UN SDG 9:** Industry, Innovation, and Infrastructure
- **UN SDG 12:** Responsible Consumption and Production
- **UN SDG 13:** Climate Action

Reusable pooling: Container stays in circulation



Single use: Packaging exits after one trip



Nothing returns to the supply chain

Stage	Single use	Tosca
Supplier Farm/Processor	Corrugated cardboard ("corrugated") is susceptible to moisture, compression, and degradation	Rigid, ventilated RPCs and bins protect product
Distribution Center	Inconsistent specs jam lines, increasing costs	Uniform specs prevent stoppages, maximizing flow and productivity
In Transit	Potential poor cube efficiency	Foldable and nestable assets; up to 7x more per vehicle on the return leg
Retailer	Labor to stock and dispose. Shrink from damage	Retail-ready on arrival. Labor time typically halved
Wash Center	No wash step. Doesn't return	Washed, tested, back in circulation
End of Use	Landfill (30+%), Recycling (70+%). Order new single-use packaging	80+ cycles. Then 99+% recycled into new Tosca assets

Together in customer partnership



Tosca works with customers across the food supply chain to transition from single-use to reusable packaging.

The results are measured across food loss, operational efficiency, emissions, and regulatory compliance, not just packaging cost.

6-9%
average reduction in damage to produce transported in Tosca reusable containers

51%
less damage to eggs on average

10%
increase in product recovery from superior hybrid containers vs. rigid bulk alternatives

51%
fewer unplanned intercompany asset transfers, reducing miles driven and associated greenhouse gas (GHG) emissions

Together in customer partnership

Category	Goal	Progress in 2025–2026
Circular Products/Innovation	• Products purposefully designed to be 100% circular; comply with relevant packaging and food-related regulations; reduce food loss, damage, and shrink; support automated handling systems; reduce labor needs and minimize transportation needs • Active participation in associations to promote reusables and the circular economy	• Partnered with 3rd-party manufacturer Cabka to develop a circular pallet made from 100% recycled materials sourced outside of Tosca's own waste streams, reusable over 100 times, and fully recyclable at the end of life • Lobbying in support of the EU PPWR and commentary on EPR regulations in Europe and the US
Regulatory Compliance	• Enable customers to comply with packaging regulations readily, maintain high ethical standards in our operations, and require the same from critical suppliers	• Drafted Declarations of Conformity (DoC) stating compliance with PPWR PFAS and toxic metal regulatory requirements (prior to August 12, 2026) and confirmed compliance to FDA and EU food contact standards • Conducted a formal sustainability assessment of critical suppliers to establish compliance capabilities and disseminate best practices
Data Security	• Maintain best-in-class cybersecurity, including ISO 27001 certification	• Initiated ISO 27001 certification process in 2025
Product Safety and Quality	• Deliver quality products and services that support customer food safety requirements and protect the staff handling them	• Maintained ISO 22000 certification across US wash facilities for the 6th consecutive year
Operational Efficiency	• Optimize and increasingly automate our management systems and operational activities to reduce environmental impacts, support our team members, and exceed customer expectations • Automated processes in place in 100% of EMEA Tosca-operated locations • ISO 14001 certification for offices in EMEA • Technology-based inventory management in place in EMEA	• Automated processes in place in 100% of EMEA Tosca-operated locations • RFID tags in place on all new assets globally • Technology-based inventory management in place in EMEA • ISO 9001 maintained for the 2nd consecutive year across EMEA office facilities • ISO 9001, 14001, and 45001 maintained for the Israel manufacturing facility
Climate Risk Management	• Develop appropriate responses to manage climate-related risks identified from our Climate Risk Assessments	• Conducted a formal climate risk assessment for compliance with California SB 261

Eliminating waste at every turn

Every customer engagement is an opportunity to show how a circular approach reduces total cost of ownership, from experiencing less downtime on automated lines to minimizing product damage in transit.

As an example, the total cost of using a corrugated item over its lifetime can be significantly larger than just the purchase price when all costs are considered, as this case study clearly demonstrates.



Corrugated packaging

Annual cost estimated — automated case-ready meat line

Period
12 months/260 operating days

Volume
3,120,000 cases

ALSO ABSORBED BY
Operations · Maintenance · Finance

DESCRIPTION	Qty	Rate	Amount
Corrugated cases — purchase cost Unit packaging cost, per procurement invoice	3,120,000	$0.72	**$2,246,400**
---------- costs not on the procurement invoice ----------			
Labor — jam clearing, baling, load rework 10 hrs/day × 260 days · absorbed by operations budget	2,600 hrs	$32/hr	**$83,200**
Downtime — packaging-related line stops 6 stops/day × 4 min avg = 104 hrs/year · logged as equipment downtime	104 hrs	$1,200/hr	**$124,800**
Maintenance — sensor and guide rail recalibration 4 hrs/week + $8,000 parts · tracked under equipment maintenance	208 hrs	$45/hr	**$17,360**
Product damage and shrink 0.08% of cases compromised · absorbed by shrink budget	2,496 cases	$45/case	**$112,320**
Waste handling and disposal Baling, hauling, disposal admin · absorbed across departments	—	—	**$35,000**
Procurement sees			**$2,246,400**
True annual cost +$372,680 never invoiced, never aggregated			**$2,619,080**

Illustrative model. All inputs are assumptions.

How reusables eliminate waste and reduce the total cost of ownership

Eliminating wasted compliance fees

Replacing single-use packaging with reusables may reduce applicable regulatory fees and associated compliance/administrative burdens

Eliminating wasted food

Protective packaging reduces damage and food waste by over 50% for egg customers and 20% for meat and poultry, reducing the environmental impact of that lost food

Eliminating wasted labor

Having retail ready packaging cutting stocking time by up to 50%

Eliminating wasted space

Up to 2.5x reduction in stack heights with nestable, stackable pallets potentially reducing cooler space and associated emissions from refrigeration systems

Eliminating wasted time

Lower number of stoppages to clear packaging related jams from automated lines reducing time by approx. 0.75 hours per day, better traceability of assets cutting time

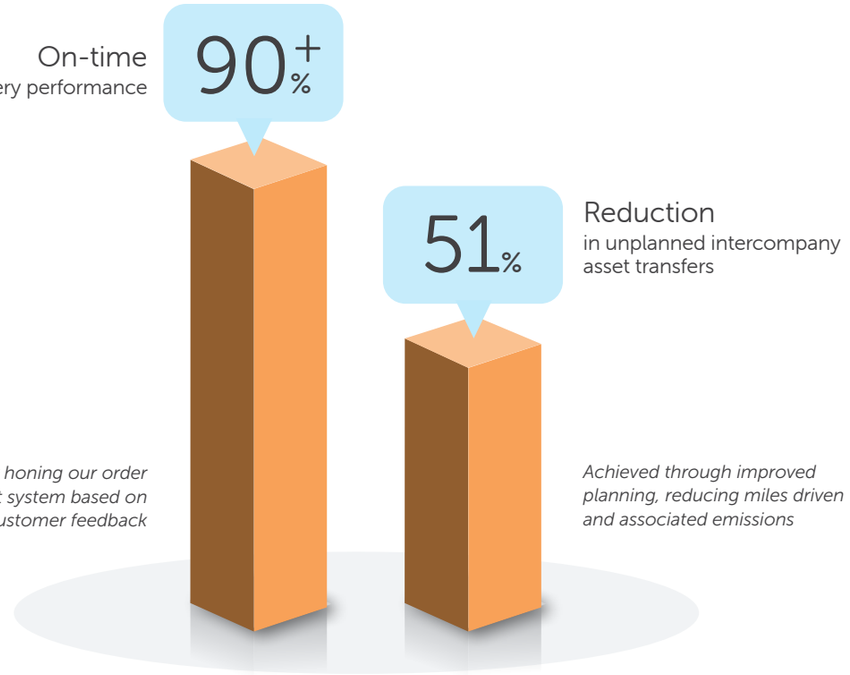
Eliminating wasted miles

Fuller trucks, fewer journeys, up to 25% reduction in transport costs and associated emissions

Eliminating wasted packaging

2.229 million metric tons of corrugated removed from supply chains since we began issuing RPCs in 2000 along with the associated emission from its recycling and/or disposal





"Most of the time, we can cut food damage by up to 50%. That means fewer trucks, fewer shipments, less food waste, which helps financially and from a sustainability standpoint."

– Eric Frank,
Tosca CEO

Innovation in action



INTRODUCING

Circular pallet

Our circular pallet, designed in conjunction with Cabka, launched early in 2026.

Tosca's circular meets PPWR and EPR requirements, and its Euro-standard 1200 x 800 mm size fits existing pallet handling equipment with no retrofits. It's also washable and lightweight, cutting cleaning downtime and physical strain in the distribution center (DC).



When you pay once instead of every time

Governments worldwide are implementing regulations to curb packaging waste and encourage reusable alternatives. Tosca has been at the forefront of this shift for decades.

We have taken an active role in lobbying and advising customers on regulations and providing solutions to minimize financial compliance costs.

The difference in cost expands with each cycle.



Associated Cost	Single-Use	Tosca Reusable Plastic Packaging
EPR fee	Paid on every unit shipped	May be exempt or paid only once,* spread over 80+ uses
Fee exposure under ecomodulation	Higher, fees rise for non-reusable/low recyclable formats	Lower, fees reflect reuse and recyclability
UK Plastic Packaging Tax	£228.8 per ton if under 30% recycled	Our UK products qualify for the 30+% recycled content exemption

*Subject to applicable law

Supporting our customers in regulatory compliance and saving money

Eliminating: Wasted compliance fees

As active board and association members of Reusable Packaging Europe (RPE), Reusable Packaging Association (RPA), British Plastics Federation (BPF), Sustainable Packaging Coalition (SPC), and International Fresh Produce Association (IFPA), we contribute to and shape the regulatory environment rather than just respond to it, promoting the benefits of reusable transport packaging as the primary mechanism for transport packaging waste reduction.

Regulation	What it requires	How Tosca helps
PPWR (EU)	• Reduce packaging at Member State level by 5% by 2030 and 15% by 2040 • PFAS and toxic metals within stated limits for assets manufactured after August 12, 2026 • 10% recycled material content for food contact packaging and 35% for non-food contact packaging by 2030 • B2B shipments between different economic operators or Member States: >40% reusable within a reuse system and B2B shipments intra-Member State within the same economic operator: 100% reusable* by 2030 • Packaging must be recyclable (design-for-recycling) • Grouped packaging in box format (excluding corrugated): at least 10% reusable • Grouped plastic packaging (e.g. shrink wrap around beverage bottles) banned* • Single-use packaging for fresh fruit and vegetables below 1.5 kg banned	• Met by design • DoC to PPWR requirements are available for all assets • Avoids fines or business disruption for non-compliance
EPR (US, UK & EU)	• Producers bear the financial cost of packaging and packaging waste remaining in their country/state • In California, USA under SB 54 also a requirement to reduce single-use plastic covered material by 10% by 2027, 20% by 2030, and 25% by 2032 placed on producers	• Tosca RPCs, pallets, and bins are classified as reusable and thus frequently exempt from fees so there is limited cost passed onto customers. Unlike single-use packaging which incurs a fee each time • If payment is required it is only made only once per unit across 80+ uses, rather than every time with single-use alternatives • Tosca is generally the producer and so customers do not have to register with relevant EPR organizations or report pooled assets. Alleviates significant administrative burden, dependent upon applicable jurisdiction
Circular Economy Act (EU, 2026)	• Common methodologies for circular design, reduced reliance on recycling alone, increasing supply and demand for recycled materials within the EU, management of health risks and foster job creation in circular sectors	• Tosca's reusable, food safe, recyclable assets within a pooling model fully fulfill the intent and requirements of the Circular Economy Act (CEA). Proof of compliance is supported by LCA evaluations which show environmental impact reductions
FSMA 204 (US)	• Full food supply chain traceability by July 2028 for certain food lines including produce (fruit and vegetables), cheese, and seafood amongst others	• Asset IQ™ provides the infrastructure for customers to be able to trace products from field to retailer via the transport packaging system. Major retailers, including Walmart, Albertsons, Target, H-E-B, and Meijer, are already requiring compliance ahead of the FDA deadline
UK Plastic Packaging Tax	• Fees per ton are levied on packaging with less than 30% recycled content	• All Tosca products manufactured for the UK contain over 30% recycled material; customers are fully shielded from this cost

*non-cardboard

Helping customers meet CA SB 54 mandated plastic reduction targets

Tosca's reusable assets are fee-exempt and help customers meet these requirements. Our protective RPCs also enable thinner or less robust primary packaging, and we've reduced our outbound stretch wrap usage in the US by 40% since 2023.

Meeting PPWR head first

August 12, 2026, marked the EU's first PPWR compliance deadline.

From this date on, packaging on the EU market must fall within set limits for PFAS and toxic metals. It also requires documentation via DoC. For food and beverage producers placing packaging on the EU market, these obligations land on you. That is, unless your packaging supplier already carries them.

Tosca assets are PPWR-ready

Tosca's reusable containers, pallets, and bins are manufactured to easily comply with PFAS and toxic-metal limits, as confirmed through lab testing and a DoC for each asset in our pool or sold. Customers who switch to pooled Tosca assets inherit that compliance instead of building it themselves.



No PFAS in Tosca assets, confirmed by lab testing



Lead, hexavalent chromium, cadmium, and mercury below limits, individually and combined



DoC available on request for every packaging type

Tosca manages labeling compliance

PPWR also introduces labeling requirements. For a company relying on reusable transport packaging, this requires a label identifying the item as part of a formal reuse system.

This responsibility typically falls on the company introducing the packaging to the market. But because Tosca owns the pooled assets, that marking falls to Tosca. It benefits from a later timeline than the August date, meaning it doesn't need to be part of a 2026 compliance list.

PPWR's secondary legislation is still being finalized. As each piece is completed, Tosca will issue updated DoC so the documentation customers rely on stays current.

EPR fees follow single-use packaging

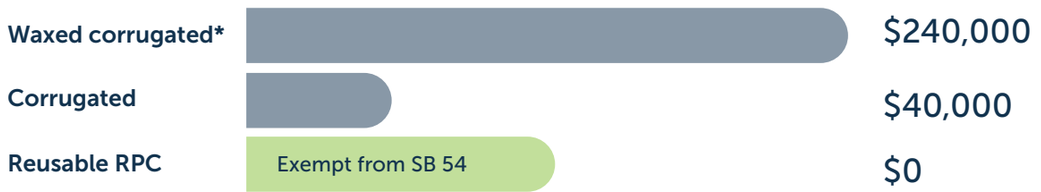
Tosca assets either sidestep them completely or significantly reduce them. Packaging EPR shifts the cost of packaging waste recycling infrastructure funding onto producers. For single-use packaging, a fee is levied on every unit, every time it enters the market.

As these programs expand across the EU, UK, and a growing set of US states, that becomes a recurring line item that grows with volume.

Reusable transport packaging is treated differently. It's often excluded from EPR fees outright, and when a fee does apply, it's paid once per asset across a long service life, not every trip.

Potential California EPR fees: Reusable vs. corrugated

One reusable RPC can replace 80+ corrugated boxes.



Reusable packaging is excluded from SB 54 covered corrugated assets materials, so no EPR fee applies.
*Waxed corrugated with plastic component.
Comparison is against 0.5 million fee-bearing single-use corrugated assets.

EPR savings in France

€391

saved per 1,000 assets on average, vs. single-use corrugated

That's the fee for 80 single-use boxes vs. 1 reusable RPC asset.



Tosca handles reporting and payment obligations for their assets, not you

For pooled assets, Tosca is both the producer and the owner. Tosca registers the assets and pays any applicable fees. Customers don't need to file, report, or pay EPR on the pooled packaging they use. Where fees would be charged on every single-use unit, a Tosca asset is paid for once and then cycles roughly 80 times before recycling.

For sold assets, Tosca generally handles the reporting obligations as well as any fee payment, although those fees would be charged back to the relevant customer. For any customer dealing with EPR reporting and fee calculations and accruals, they will understand the benefits afforded by Tosca's ability to relieve them of even a portion of those administrative burdens.

Reporting and paying a fee for every single-use packaging item is reduced using Tosca pooled packaging assets.





Where fees apply, and where they don't

Coverage varies by region

Tosca has a clear overview of where and how fees apply, which takes that headache away from our customers. But as a rule, Tosca reusable transport packaging carries limited fee exposure.

In the EU and UK

In the EU and UK, Tosca reusable transport packaging is exempt from EPR fees in most markets. In the US, California fully exempts reusables from fees, while Tosca assets used in Oregon have no fee or reporting requirements as our assets do not remain in the state at end-of-life.

Reducing what single-use packaging remains

While Tosca assets themselves are exempt, the outer packaging used during transportation, stretch wrap, banding, white-wood pallets, and slip sheets can still carry fees. Tosca is working with customers to cut those materials on both outbound (Tosca cost) and inbound (customer cost) legs, in an effort to lower EPR exposure. The interlocking nature of our RPCs and pallets better enables such reductions, if not complete elimination.

Proving our case

Tosca's pilot program lets you test reusable packaging through a small, controlled scope.

How Tosca's pilot process works

30–60 Days

1 Planning

- Define goals and key performance indicators (KPIs)
- Scope products and location
- Model expected savings
- Establish reverse logistics

2 Implementation

- Train suppliers and teams
- Launch on-site with hands-on support at stores and DCs

3 Measurement

- Monitor continuously and optimize
- Report on damage, transportation, and labor reductions
- Understand next steps and full conversion timeline

> *"So anytime there's a change, there's a little pushback or a little hesitancy because your thought process [is] "Well, if it's not broke, why try and change something else?" But during this process, we found out that, hey, it [the change] worked out better for us overall, as far as different cost saving events. So, it took me a little bit to get on board, but now we're on board."*

– SCOTT BERGER
Brookshire Bros

What Tosca Does

- ✓ Plans and executes the full pilot
- ✓ Sets up suppliers and trains both teams
- ✓ Provides on-site support at launch
- ✓ Oversees reverse logistics and optimizations
- ✓ Reports results throughout

What You Do

- ✓ Select the pilot location(s)
- ✓ Educate your internal team
- ✓ Share details like volumes, shippers, return locations, etc.

> *"Some of the problems that we had with the cardboard [were] the weight factor. It was hard on the people having to pick up and load and lug the boxes... so much that [it] would create the issue where we would actually lose product."*

– KIRK LOONEY
Maintenance Engineer, Brookshire Bros

>90% immediate conversion rate to full programs

Changing your packaging impacts your entire business. Tosca's pilot programs show the benefits of reusable packaging in action, including reducing costs, product loss, emissions, and wasted labor, with little disruption to operations.

30–60 days to run a small-scale pilot, with measurable results as soon as day one

Every pilot includes customized savings and sustainability modeling, reverse logistics planning, on-site training, and continuous reporting on damage, transportation, and labor reductions.



> *"Our pilots are designed as a white-glove service, not a cookie-cutter trial. We take the time to map the customer's supply chain, identify every key point of contact, and build a solution around the individual customers' specific needs.*
>
> *With Tosca support at each stage, from RPC delivery to packing and return, we aim to make the transition as smooth and hands-off for the customer as possible. When corrugated disappears and reusable crates show up without them even noticing, that's when we know we've done our job well."*

– PRESTON MAYO
Commercial Project Manager

Closing the loop on food and material waste

Eliminating: Food loss and product damage

Tosca's reusable plastic packaging is a leading choice in sustainable packaging. Our rigid, robust reusable assets minimize damage to food, reducing environmental impact from waste and total cost.



Less lost, more delivered

$70M+
in annual egg shrink savings across leading retailers

$120M+
in annual case-ready meat shrink savings across leading retailers

$0.95
average savings per case among poultry customers

$0.77
average savings per case among case-ready meat customers

Traditional packaging

(corrugated, polystyrene, wood)

- Limited useful life
- Less robust construction
- Increased carbon footprint
- Increased risk of product damage and waste



VS.

Reusable packaging

- Designed for reusability
- Contributes to a circular economy
- Sturdy, stackable construction with built-in ventilation
- Display ready
- Less product damage throughout the supply chain
- Decreased carbon footprint



Why packaging costs must include product damage in packaging price per unit

Packaging decisions generate downstream costs. While it's easier to see the price per unit, cost identification needs to include the product loss that it does (or doesn't) prevent. The cheaper box can be the costlier one once the loss is counted.

Associated cost (avg. for 1M eggs)	Corrugated/single-use	Tosca RPC
Loss cost per dozen eggs	$0.1 USD	$0.055 USD
Shelf stacking time per box of dozen eggs	0.06 hours	0.03 hours
Total cost per dozen eggs	$ 3.28 USD	$2.41 USD

Designed to protect

Tosca reusable crates and bulk containers' rigid walls provide 4x more protection than single-use alternatives.

All while providing the most sustainable way to move products from point A to point B.

They can also provide better ventilation and more uniform heat and cool air transfer through the contents than single-use alternatives.

50%+

shrink reduction with Tosca egg RPCs

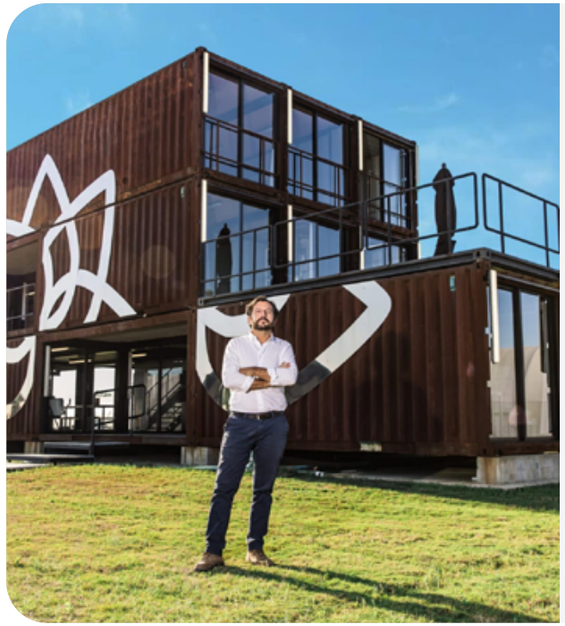
37

million eggs saved from damage or discard in a single year by a leading national retailer

6x

faster cooling than corrugated, reducing the temperature window in which bacteria like Salmonella can develop. Also reduces freezing and thawing time and the resources needed to do so





TOSCA SUCCESS STORY

Cultiva Farms: Farming innovation in turbulent conditions

Challenge

Cultiva Farms expanded its family growing operation from Italy to Jennings, Florida in 2015 to supply baby leaf greens to East Coast retailers. But Florida's humidity and unpredictable weather made traditional packaging unreliable, and delicate greens couldn't tolerate the damage that came with it.

Outcome

Tosca's RPCs are 4x stronger than corrugated, which greatly minimized damaged products. Standardized dimensions also cut time spent adjusting loads in transit. Cultiva could focus on farming innovation instead of troubleshooting packaging failures.

> *"We concentrated all our crate usage on Tosca."*
>
> – FEDERICO BOSCOLO,
> President, Cultiva Farms USA

TOSCA SUCCESS STORY

Prairie Star Farms improves egg packaging with Tosca RPCs

Challenge

When the H5N1 avian flu outbreak disrupted supply, national egg producer Prairie Star was shipping up to 3x normal volume, making each egg more valuable and packaging failure more costly. But because corrugated cardboard absorbs moisture in cold storage, boxes soften and collapse meaning they could not be stacked too high, resulting in lower cube efficiencies and greater transportation needs. As eggs moved through their automated supply chain systems, inconsistent packaging sizes across retailers required machinery adjustments that added downtime.

Outcome

Tosca RPCs allow freshly laid eggs to cool up to 6x faster than in corrugated boxes, allowing faster transfer from farm to shelf, with less potential for spoilage. GHG emissions also dropped 63% after the switch due to the ability to stack crates higher enabling better cube efficiency. The more uniform sizing also eliminated machinery adjustments.

> *"Eggs are high-value but low-margin, so packaging quality is critical. Cold, moisture-rich environments make traditional boxes fail, and that failure leads to damage."*
>
> – KURT WOESTE,
> Logistics Manager, Prairie Star Farms

Keeping products safe from farm to shelf

Built for food safety from the ground up

Tosca's circular packaging is built from 100% food-grade plastic. We divert waste by incorporating reground assets into new products, ensuring all components remain food-contact safe throughout the lifecycle via strict manufacturing protocols. Our customers can reduce certain contamination risks associated with single-use alternatives.



Ed Brockhoff

Director of Supply Chain & Manufacturing at Ollie

> *"RPCs are very useful for the frozen product because they allow for circulation of cold air in the freezers, getting packs frozen more quickly."*

Six years running with zero major non-conformities on our food safety management system, ISO 22000, implemented in every US wash facility.

DoC are held for each food-contact product, confirming compliance with food-contact regulations in Europe and the US and PPWR requirements in the EU.



TOSCA SUCCESS STORY

Growing efficiency at R. Brush Farms

Challenge

R. Brush Farms, an Ontario broccoli farm, needed packaging that could maintain product integrity through the cold chain. Their standard corrugated packaging became soggy and deteriorated in transit.

Outcome

Improved food safety, better product preservation, increased packing and shipping efficiency.

> *"It has been easier to work with Tosca overall. We can count on your product being something that we can use."*
>
> – REGAN BRUSH,
> Manager at R. Brush Farms

Tosca assets support customers' food-waste-reduction goals

Reusable polypropylene products	Built-in ventilation and superior strength enable faster cooling times and keep produce safe and fresh during transit. Strong, stackable construction reduces storage-related damage.	
Retail-ready products	Egg crates, display bins, beverage trays, pallets, and Crystal Clear crate displays move products to the sales floor faster, minimize double-handling, and reduce food waste.	
Bulk bins	Designed to maximize content recovery compared to similarly sized alternatives. Washable and sanitized to the highest food safety standards, reducing the risk of contaminant transfer through the supply chain.	

Protection during use



Sanitation standards are part of Tosca's promise. Every RPC, along with pallets and bins requiring food safety compliance, undergoes a rigorous wash process.

Tosca's wash cycle is a precise, closely monitored process. All chemical usage, water temperature, and pressure levels are closely regulated to produce the best possible results.

Our industry-leading Quality and Food Safety Management System (QFS) in EMEA ensures strict hygiene standards and aligns with ISO 9001 and ISO 22000 across all service centers.

In the US, all Tosca wash facilities are ISO 22000-certified.

Food safety is a shared responsibility across Tosca. The QFS team ensures compliance by contributing to new business discussions, conducting regular facility and 3rd-party location audits, and providing role-specific digital training.

As a board member of the RPA, Tosca played a key role in developing industry-wide guidance in the form of the RPA Guidelines and Best Practices for the Safe Use of Returnable Containers in Food Supply Chains. And to date, we have not seen any reported foodborne illness outbreaks linked to RPCs across the sector.

Built for food safety

Zero

RPC recalls since records began (2000)

Zero

incidences of non-compliance under ISO 22000

81,657

food safety tests performed in North America (NA) and EMEA

6th

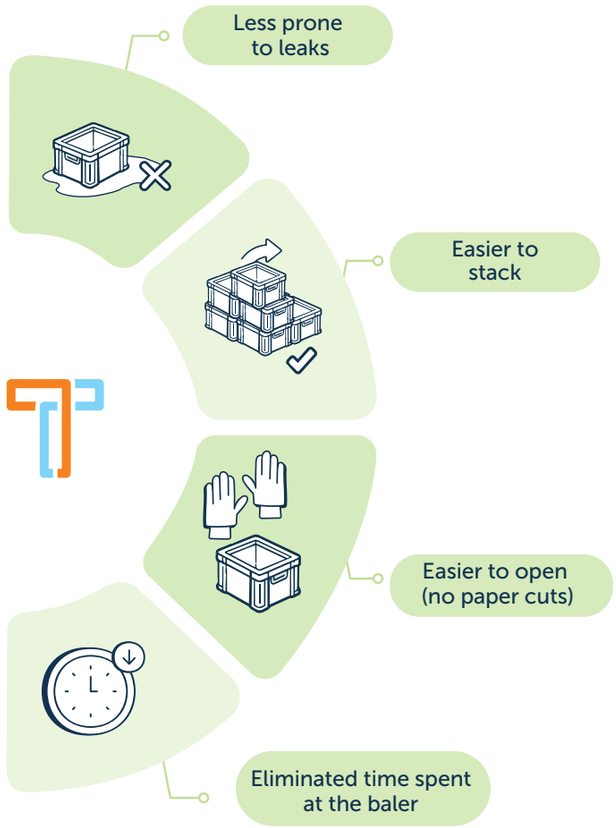
consecutive year of zero findings on ISO 22000 audit (NA)



Optimizing for labor and space savings

Labor savings

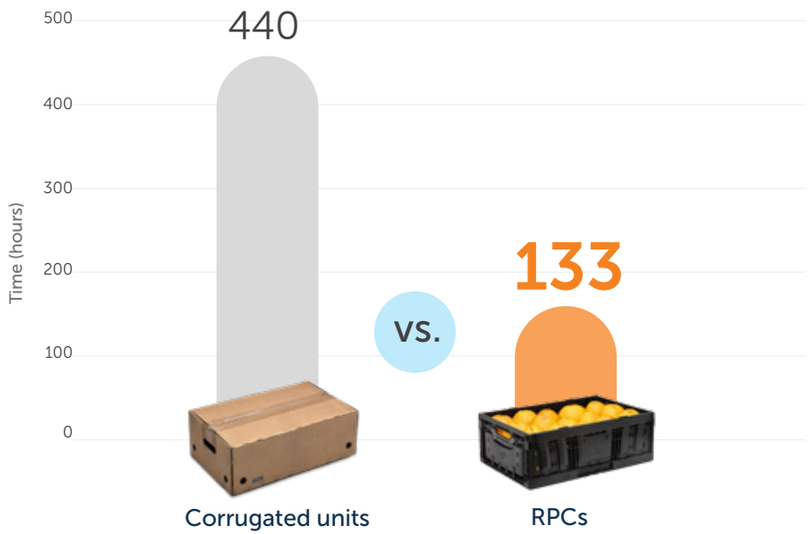
Workers have frequently stated that they preferred the RPCs to corrugated boxes because they were:



Time is money

307 hours saved

per 100,000 RPCs vs. corrugated units



Based on an average of 1.65 hours to create a bale of 375 boxes

> *"Since we've made the transition, production has increased because we don't have the issues with the boxers [machines]. We can just build the RPCs, fill 'em, and go. My guys in the back, they were just ecstatic because the boxers were so clumsy trying to operate 'em. It's been a seamless transition."*
>
> – KENNETH HALLMAN,
> Meat Plant Engineer, Brookshire Brothers



TOSCA SUCCESS STORY

How Tosca RPCs strengthened Brookshire Brothers' meat operations

Challenge

Brookshire Brothers, a vertically integrated grocer based in Texas, had corrugated boxes that caused line breakdowns, generated waste between shifts, and required 6 people to handle packaging.

Outcome

Throughput increased from the first run. Packaging labor fell from 6 people to 1. Product damage declined. Zero corrugated to landfill.

> *"We are able to move at a much faster pace. RPCs are more efficient, resulting in labor savings, and we do not have any damage issues. Not only that, we are able to help the planet, too."*
>
> – RANDY DEAL,
> Director of Perishables, Brookshire Brothers

Brookshire Brothers

Space savings

For one customer, switching to foldable bulk containers resulted in an 87 MT CO_2e reduction, equivalent to 213,028 miles driven by an average petrol car per year. These measurable environmental and supply chain benefits show Tosca's innovative solutions in action.

The labor hours that add to your packaging costs

Packaging shows up in your labor hours, not just your unit price.

Damaged or inconsistently sized boxes add rework or stoppages to unjam automated systems in the DCs.

Single-use boxes have to be broken down and baled at the retail store. That is lost time for handling waste packaging instead of moving product to the shelves.

Reusable crates cut that handling out. Tosca customers save 307 hours per 100,000 RPCs compared with corrugated. At Brookshire Brothers, packaging labor on the meat line dropped from 6 people to 1.

307
hours saved per 100,000 RPCs compared with corrugated

1
packaging labor dropped from 6 people to 1

80%
space saved

Hannah Renton
Asset & Customer Service Manager

"At Tosca, we believe exceptional customer service is built on strong partnerships and a deep understanding of our customers' needs.

By working closely with our customers, responding proactively to challenges, and continuously seeking opportunities to improve, we create a seamless and reliable experience that supports both operational success and sustainability goals.

Our commitment is to deliver consistent, high-quality service that our customers can trust every day, helping them achieve their objectives while building long-term value together."

Tosca's Superior Hybrid foldable bulk bins collapse flat when empty, allowing 182 bins per return trip, compared to 40 rigid intermediate bulk containers. Saves space on the truck and in store rooms post use.

TOSCA SUCCESS STORY

Reusable crates boost Fiordelisi's transport efficiency

Challenge

Fiordelisi, an Italian specialist in sun-dried and semi-dried vegetables, manages high seasonal volumes of sun-dried tomatoes across multiple sites in southern Italy. Their traditional stackable plastic crates took up significant space when empty and limited how much product could be loaded onto each truck, creating inefficiencies in storage, handling, and transport.

Outcome

Empty crates now require 20% of the previous storage space. Fiordelisi can load 560 additional filled crates per truck, moving more than 1 extra metric ton of product per journey. Fewer trips cut associated emissions and improved cost efficiency.



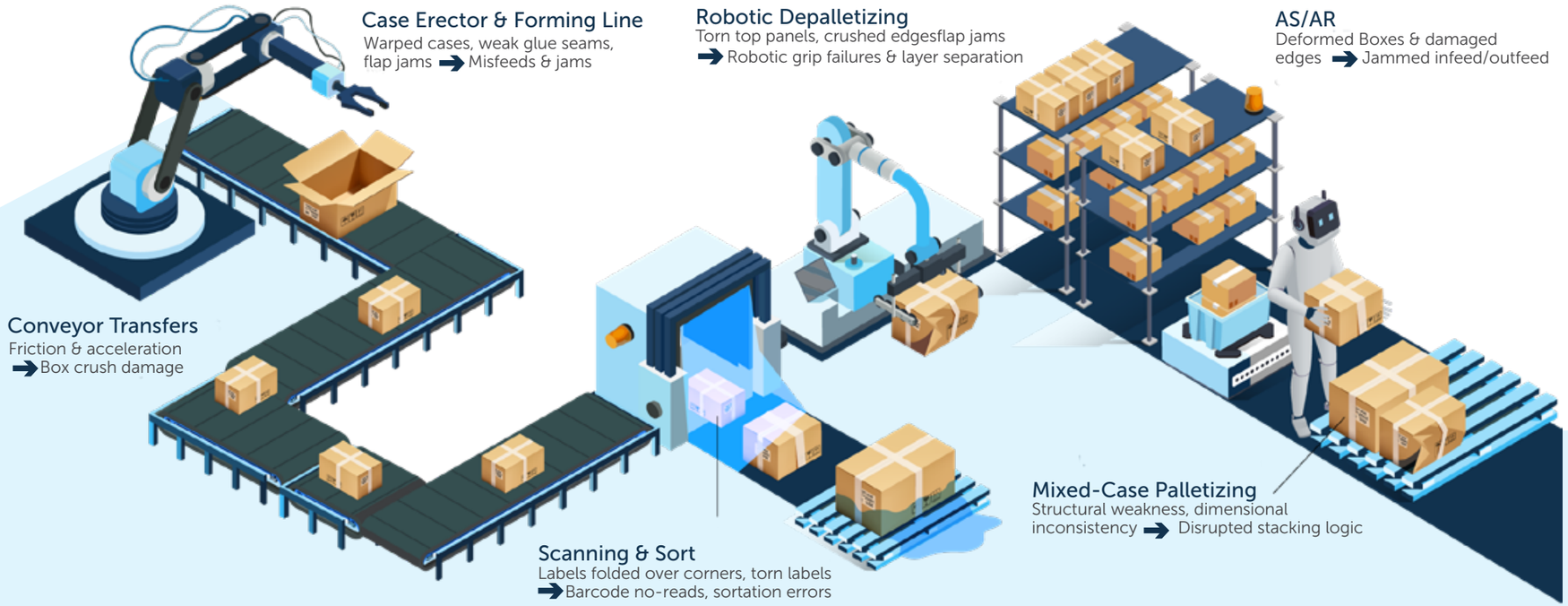
"Being able to send over a tonne more product on the same truck makes our transport both more efficient and more sustainable. We reduce the number of trips and the emissions linked to them."

– ANTONIO FIORDELISI,
General Manager, Fiordelisi

FIORDELISI
from field to fork

Automation ready

Automation: How reusables ensure success



Corrugated Boxes

Reusable Crates & Bins



Keep their shape

Rigid walls & standard footprint dimensions

Speak automation

Stable surface supports labeling & scanning

Protect the load

No corner crush, side bulge, or bottom-case collapse

Handle moisture

Without box crush, warping, or leaking



TOSCA SUCCESS STORY

Iperal **transforms fresh supply chain with Tosca's automation-ready reusable plastic crates**

Challenge

Iperal, a northern Italian supermarket chain, opened a fully automated Fresh Food Centre in 2025. The mix of corrugated, plastic, and wooden crates moving produce down the automated line from suppliers to stores led to destabilized pallets and created downtime.

Outcome

Switching to Tosca Wood Look RPCs and bins increased pallet stability, making automated handling safer and more predictable. Consistent crate dimensions reduced downtime and supported smoother material flow. Waste management is also simplified. Iperal is expanding the program to suppliers in Spain and the Netherlands.



"Tosca's automation-ready RPCs fit seamlessly into our existing lines, ensuring smooth handling, consistent stacking, and reliable flow through every stage of the automated process. We've seen faster throughput, fewer stops on the line, and more consistent performance overall."

Lorenzo Zecca | Supply Chain Director, Iperal

The cost of a line that keeps stopping

On an automated line, the wrong box costs you production time and labor costs, not just the box.

When boxes are moved manually, a worker can pull out a failed box and keep going. When boxes move down an automated line, though, that box jams the machine and the line stops until someone clears it. Until then, everything behind it waits. Non-uniform pallets cause the same problems.

Solely considering the price per packaging unit is therefore a very limited approach when evaluating packaging costs. In an automated environment, a box, pallet, or bin that jams the line costs far more than the cents you saved buying it.



"With 64% of warehouse leaders planning to increase modernization spending over the next 5 years, the need for consistent, robust packaging is paramount. It is estimated that 11% of unit loads experience some level of damage during movement. Cold and wet environments can impact box strength by up to 60%. Downtime from packaging related-line stops can be in the order of 144 hrs/year resulting in costs of over $0.5M. The second largest cost impact after product damage and shrink."

–Scott Schimming
VP Commercial Sales NA, Tosca



Enhancing efficiency

Eliminating: Wasted miles and empty return journeys

Tosca collaborates closely with carriers and customers to coordinate routes, share resources, and reduce empty miles on return trips. Using KPIs and dedicated dashboards, we monitor daily on-time deliveries to improve our efficiency continually.

Through Llamasoft, a leading supply chain design and analysis tool, we annually optimize our wash center hub locations to reduce emissions intensity and improve on-time delivery.

4 new depots

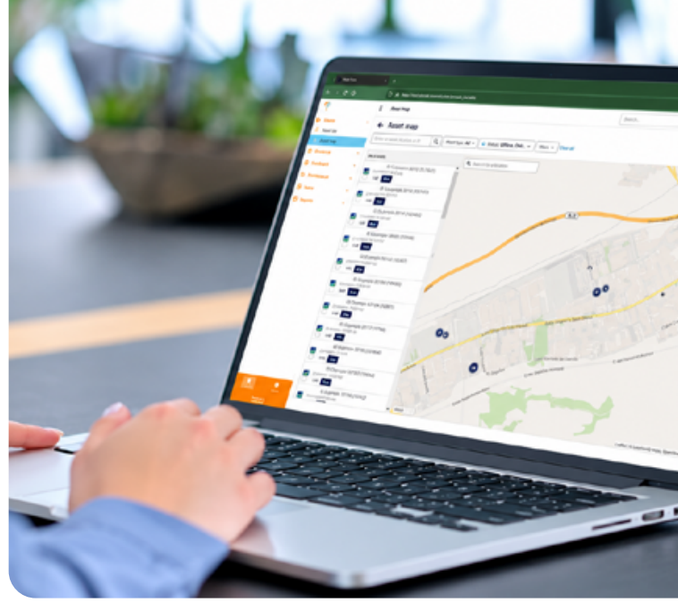
established across EMEA to close the distance between Tosca and customers



Eliminating: Wasted compliance fees

Tosca Asset IQ™: Faster turns, fewer losses

Tosca Asset IQ™ is a refined tracking and tracing technology that can give customers precise visibility into the condition and location of their assets throughout the value chain. This digitized approach uses GPS trackers which can be built into or attached to Tosca assets.



Every new asset can now be tracked with RFID tags on 100% of new products in the US, UK, and EU

The RFID capabilities now available on all new Tosca assets provides the ability to track assets all along their supply chain journey and provides the digitized data necessary to demonstrate compliance with regulations such as:

- The EU's PPWR
- EPR laws
- The Food Safety Modernization Act (FSMA) 204 - Traceability
- The EU's Decision No 768/2008/EC on a common framework for the marketing of products

> To learn more about how Tosca can support our US customers in compliance with the forthcoming FSMA 204 using Tosca Asset IQ™, explore our comprehensive article on the regulation.

Data management by the numbers

Our Tosca Asset IQ™ also supports our internal processes by quickly identifying bottlenecks, misplaced pallets or RPCs, and delayed shipments, reducing asset loss, cutting product waste, improving delivery rates, and enhancing logistics planning.

100%

of all new products in the US, UK, and EU are RFID tagged

54%

improved scan rates at service centers using RFID Gateways

100%

of all new Tosca manufactured assets are now RFID-enabled

Beyond the financial upsides of losing fewer assets, our loss reduction reduces:

GHG emissions tied to manufacturing replacement assets

Delays in providing assets for our customers to use

Transportation-related emissions from unplanned and unnecessary internal asset transfers

Cybersecurity

We're proud to reflect on the remarkable progress made across the Tosca IT team. Our team has demonstrated exceptional dedication, collaboration, and technical expertise, driving forward key initiatives that strengthen our organization's technology foundation.

Tosca's phishing awareness is **55%** better than industry peers

Investor Portfolio Cybersecurity Scorecard improved **>20%**



Advancing customer sustainability goals

Every customer partnership begins with a 360-degree assessment of how our reusable assets and pooling solutions meet their sustainability goals. Using COMPASS/ECOIMPACT, an LCA tool endorsed by the SPC, we provide the data necessary to support a customer's selection of packaging that aligns with their supply chain and environmental objectives.

Our LCA results are used to show potential and actual estimated savings as well as supporting customers' Scope 3 emissions reporting requirements, which is vital for their compliance to mandatory disclosure frameworks, including the EU CSRD and California SB 253.

77 LCAs completed in 2025

to help businesses make data-driven packaging decisions

2 new high-level LCA calculators

introduced for beverage manufacturers and bulk liquid transporters

Finding a way to a better LCA

Consistently seeking opportunities to eliminate waste extends to how we measure it. When working with clients on packaging switches, we continually question how emissions are calculated and consult with different software providers to find an increasingly more accurate approach.

In 2025, the corrugated Tosca kept out of the supply chain in the US alone saved 179,899 metric tons of CO_2e and 1.236 million m^3 of water. That's equal to the carbon stored by about 1.466 million trees and the water in 494 Olympic swimming pools.



TOSCA SUCCESS STORY

Fieldale Farms achieves a more sustainable poultry supply chain

Challenge

Specialty poultry producer Fieldale Farms needed a sustainable, protective, cost-neutral solution for transporting product to retail customers.

> *"I think we can always say we want to be green and we want to reduce our carbon footprint, but in the end, it needs to work. In this case, it works for all of us: the warehouse, the individual stores, and us."*
>
> **– Brad Moore,**
> Retail Sales Manager at Fieldale

Outcome

500
fewer boxes per truck

24%
fewer boxes handled in DCs

80%
emissions reduction between Fieldale Farms and 1 retail partner over 10 years

143
million gallons estimated water savings

What's ahead

01.
Continued consultation with and support of Tosca customers for upcoming compliance with the EU PPWR and global packaging EPR requirements, US FSMA 204, and the EU CEA.

02.
Lobbying for greater consideration and support of reusables and circular packaging during the drafting of new legislation. This includes EPR laws in US states, the CEA, secondary legislation being drafted for PPWR implementation, and new and updated food contact regulations.

03.
Developing enhanced tracking and tracing capabilities to support asset management, maintain customer product quality, optimize logistics, and enable customer regulatory compliance.

04.
Working to maximize the percentage of recycled material in Tosca assets and maximize reuse to minimize the environmental footprint of the services we provide to our customers and ensure regulatory compliance, e.g., PPWR.

05.
Expanding our LCA process to integrate the environmental impacts of food loss/damage and replacement into the overall environmental footprint when comparing packaging types.

06.
ISO 27001 certification and using AI as an integrated business evaluation and productivity tool to expand analytics capabilities and deliver deeper insights and data-driven decisions.

07.
Moving customer experience from a transactional to a consultative approach.

Together in operational excellence

Sustainable business is a journey, not a destination. And we are always moving forward.



Tosca's 2025 highlights

27%
reduction in overall GHG emissions intensity by revenue since 2021

21%
Scope 1 (direct energy use: natural gas and propane) emissions reduction

17
percentage points increase in electricity provided from renewable sources

7%
Scope 2 (electricity use) emissions reduction

30%
reduction in Scope 1 and 2 emissions intensity by operating hours since 2021

10%
reduction in energy use at our Israel manufacturing facility

Zero
locations affecting biodiverse or ecologically protected areas

26.36
metric tons in carbon savings since the launch of our salary sacrifice car leasing

5
hours per person minimum sustainability training completed across the team

>75%
increase in Scope 3 (supply chain) data collected

46th
LSA Commerce & Consommation Innovation Award for Tosca's sustainable, reusable, and recyclable plastic beverage trays

EcoVadis Gold Award
received 5 years running in EMEA

Our 2030 target

We are highly aware of how our actions impact the environmental footprint and the sustainability goals of our customers.

In 2025, we believe we saved our US customers:

179,899

metric tons of GHG emissions (CO_2e)

1.236

million m^3 of water used for transport packaging of their goods across the supply chain

277,607

tons of corrugated cardboard from needing to be recycled or landfilled

This is partially achieved by how we design and manage our operational activities. Working with team members and our suppliers, we take bold steps to reduce our environmental footprint by saving energy, cutting emissions, reducing water use, and generating less waste.



Our 2030 target

Scope 1 and 2 emissions reduced by 42% from a 2021 baseline

Scope 3 emissions reduced by 42% from a 2024 baseline

All emissions on the path to net zero by 2050

Together in operational excellence

Category	Goal	Progress in 2025–2026
GHG Emissions	• Achieve net zero by 2050 • 42% reduction in Scope 1 and 2 absolute emissions from a 2021 baseline • 42% reduction in Scope 3 absolute emissions from a 2024 baseline	• Improved data collection now provides a more accurate picture of emissions associated with energy use across electricity, natural gas, and propane • 27% reduction in overall GHG emissions intensity by revenue since 2022 • 21% Scope 1 (direct energy use: natural gas and propane) emissions reduction • 7% Scope 2 (electricity use) emissions reduction • 17-percentage-point increase in the share of electricity provided from renewable sources • 30% reduction in Scope 1 and 2 emissions intensity by operating hours since 2021 • A 75% improvement in data relating to purchased goods and services, transportation and waste disposal, providing a more accurate picture of our supply chain emissions
Energy Use and Renewables	• Continual focus on improving energy use intensity • 100% of facilities with LED lights in the largest-footprint areas in EMEA (wash areas, warehouse areas, and corporate offices) operated by motion sensors • Replace fossil fuel-based energy use with renewable-sourced energy where practicable • Electricity 100% renewably sourced (direct or through agreements) in EMEA	• 100% LED lighting in place in the largest-footprint areas across all EMEA Tosca-operated locations, controlled by motion sensors • Electricity in EMEA is 70% renewably sourced, either directly or through renewably generated grid electricity (average globally is 46%) • Operations teams in both EMEA and NA increased assets washed per hour on wash lines, reducing energy consumed per asset without compromising cleaning cycles • Implemented a renewable energy policy requiring evaluation of renewable options at each utility contract change, with a requirement to select the renewable option where cost-comparative
Water	• Continual focus on improving water use intensity (volume/# items washed) in our wash centers from a 2024 baseline	• Efficiency improvements that increased assets washed per hour also reduced water consumed per asset
Waste	• Actively implement waste reduction, reuse, and recycling processes for the largest waste streams (by volume) arriving at our facilities • 100% of EMEA facilities (wash centers, service centers, and offices) are certified as zero-waste-to-landfill	• 100% of EMEA facilities certified as zero-waste-to-landfill • In the UK, all waste stretch wrap is collected by the same company that recycles Tosca's end-of-life assets • In the US, a partnership was established with a customer who incorporates Tosca's stretch wrap and corrugate into their own recycling program, eliminating a Tosca waste stream from landfill
Supply Chain Optimization	• Critical suppliers demonstrate active commitment to our sustainability objectives, goals, and targets, while consistently meeting our sustainability expectations • EMEA suppliers understand our sustainability expectations, implement energy, water, and waste reduction activities to the same level as Tosca, and critical suppliers are audited	• Conducted a formal sustainability assessment of critical suppliers (3rd-party manufacturers, 3rd-party wash centers, and logistics companies) covering the EU PPWR compliance capabilities and best practice dissemination • Implemented a formal carbon emissions data collation process with 3rd-party manufacturers and wash centers to collect CO_2e emissions data associated with Tosca business • Provided suppliers with a calculator to determine emissions attributable to Tosca activity

Calculating our carbon footprint

As a leader in reusable packaging, we know that effective climate action begins with fully tracing our carbon impact. The data helps us understand where we can minimize adverse climate effects through both internal diligence and focused collaboration across our network.

In 2025, we implemented an integrated sustainability data management and reporting system (SDMRS) to consolidate global utility, purchasing, logistics, travel, waste, and capex data to improve the accuracy of our emissions calculations. This data-centered approach holds us accountable to our emissions reduction objectives which align with the 1.5°C global warming limit.



In 2025,
direct operations (Scope 1 and 2) accounted for approximately:

12%
of total GHG emissions

>88%
of total GHG emissions are Scope 3 emissions from the supply chain



46%
In FY25, 46% of our electricity came from renewable sources, up from 33% in FY22

Better ways to operate

Upgrading our facilities and equipment is one of the ways that Tosca reduces direct emissions and increases our energy efficiency. To date, we've implemented:

100% electric forklifts across EMEA

100% battery-powered floor cleaners and scissor lifts globally

90+% of facilities have some form of automation in place (2030 target: 100%)

70+% of facilities globally have LED lighting in largest footprint areas (2030 target: 100%)

99% cloud computing solutions, eliminating back-end physical servers and reducing our IT energy footprint by 80%

25% of EMEA facilities have solar panels that generate power for the property owners; actively exploring opportunities to harness that energy for Tosca's own use

30% electricity savings from replacing all overhead production floor lighting with LEDs at our manufacturing facility

New facilities are designed from the ground up to meet the highest energy-efficiency standards.



Scope 1 and 2 emissions intensity by operating hour reduced by nearly 8% from 2024 and 30% from our 2021 baseline. Our 2030 target is a 42% reduction against a 2024 baseline.

Eliminating waste at Tosca

Replacing single-use packaging systems and eliminating the associated waste is core to our business purpose. It's a goal we're also working to realize internally, in our service centers, office, and supply chain.

Zero-waste-to-landfill aspirations

913 MT

total waste generated in 2025, down 41% from 1,548 MT in 2024

100%

of total plastic asset waste diverted from landfill, predominantly reused to create new Tosca assets

Zero

hazardous waste generated in 2025 (all regions)

25%

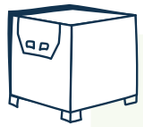
Inclusion of increasing amounts of old assets into new assets: Recycled content rates in 2025 consistently average 25%

Total waste down 41% in a single year

2030 target: Zero-waste-to-landfill

A global focus on stretch wrap

1



Optimized wrapping patterns

X- and Z-patterns are now standard across US facilities, reducing wrap volumes by 20–25%.

2



Equipment upgrades

We are actively replacing manual wrappers with high-efficiency automated equipment, including new machines at our Riverside, CA, facility, to minimize total wrap usage and reduce EPR fees.

3

Strategic material shifts

We are replacing stretch wrap with nylon straps where possible in EMEA, as demonstrated in our Ireland facility, and have eliminated top cap sheets for many customers in NA.



Recycling what remains

EMEA

Waste stretch wrap is consistently diverted through plastics recycling partners



Waste stretch wrap (post-use) → Diverted to recycling partners → Into plastics recycling chain

US

We are building a partnership approach to the recycling of inbound stretch wrap, turning a waste stream into a mutual cost-saving opportunity while removing a Tosca waste stream from landfill.



Inbound stretch wrap to Tosca → We have partnered with one customer to return inbound stretch wrap to them for inclusion in their recycling program → Included in their recycling program

Values in action

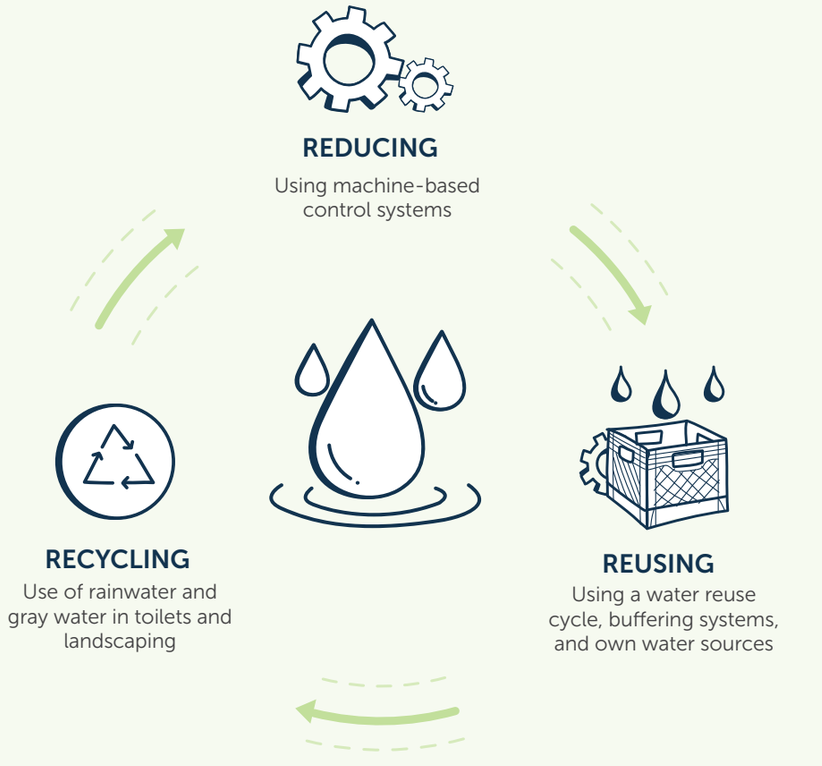
Tosca's Milan office is now 100% plastics free, living our goal of eliminating single-use materials.



Water: Reducing, reusing, recycling

To uphold strict food safety standards while minimizing water use, we focus on 3 core strategies: reducing, reusing, and recycling water, both internally and in our 3rd-party wash centers.

During our recent supplier sustainability engagement activities we identified a number of best practice examples to share amongst our wash center partners. These include:



REDUCING
Using machine-based control systems

RECYCLING
Use of rainwater and gray water in toilets and landscaping

REUSING
Using a water reuse cycle, buffering systems, and own water sources

Creating a more responsible supply chain

We help customers build the most efficient, sustainable supply chains. That starts with embedding sustainability in our own supply chains and working with suppliers who share our commitment to responsible operations. We take our responsibility to protect the planet seriously and want to encourage those we work with to do the same.

6,589
Tier 1 suppliers in 2025

Zero
negative social impacts identified requiring action in 2025

100%
of critical suppliers screened using social criteria in 2025

100%
of critical suppliers assessed for environmental risks



A circular system built on strong partnerships

Our circular system relies on a network of key partners, from raw material suppliers and 3rd-party manufacturers, additional wash centers to logistics and recycling companies, all focused on reducing waste and extending the life of our products. We collaborate with them on energy efficiency, renewable energy, water use, and consistent LCAs to lower the overall footprint of our services.

Additionally, we're jointly developing new products by replacing fossil-fuel-based raw materials with sustainable and recycled options such as the Circular Pallet, making our packaging fully circular, lighter, and more durable.

Through our Supplier Code of Conduct and close working relationships with critical 3rd-party suppliers, we set expectations to minimize energy consumption, reduce emissions, and use renewable energy wherever practical.

In 2025, we revised our approach to our suppliers by:

Creating
Creating an online annual self-assessment tool for our 3rd-party manufacturers, wash centers, and major logistics companies

Supporting
Supporting their calculation of emissions associated with Tosca contracts by providing a simple calculator

Offering
Offering a benchmark scorecard for their internal use

This helps us understand current efforts and actions in play amongst our most critical suppliers and enables the sharing of best practices. The intent is to support our 3rd parties in their sustainability improvements by facilitating the sharing of experiences and expertise already existing within their sectors.

Manufacturers and wash centers

Our recent supplier sustainability survey revealed that a number of exciting energy use reduction and renewable energy use practices are occurring:

>40% of our manufacturers rely solely on renewable energy, with a further 40% of suppliers using at least 50% of their energy generated by renewable sources

45% of our 3rd-party wash centers use > 50% of their energy generated by renewable sources

Most manufacturers have Scope 1 reduction, carbon-neutral, and/or net-zero goals

66% of manufacturers report Scope 1 and 2 emissions externally, while around 45% of wash centers report Scope 1 and 2 emissions as well

> *"As a site manager, it's important to me that the company I work for takes sustainability seriously. Our rooftop solar installation is a visible reminder of Tosca's investment in renewable energy and reducing emissions. Combined with our reusable packaging model, it makes me proud to work for a business that is driving meaningful environmental change while delivering operational excellence."*
>
> – MARCIN KULESZA,
> Regional Operations Manager



Logistics

Knowing our largest Scope 3 emissions come from logistics activities, we work closely with logistics partners to optimize routes, reduce empty miles, and increase intermodal transportation.

We position our service and wash center hubs to minimize travel distances through an annual evaluation using Llamasoft in the US and Log-hub in EMEA, specialist supply chain planning software. This helped us streamline our operations in 2025 by consolidating wash centers in the US and opening a new service center hub in Salzkotten, Germany for our EMEA operations.

Our transportation management systems and product design enable more efficient load building, moving more assets in fewer trips, while generating the emissions data our customers need for their own Scope 3 reporting.

2030 goal

42% Scope 3 emissions reduction target from a 2024 baseline

Decarbonizing logistics

Since 2022, Tosca has consolidated US transportation providers by over 90%, leveraging global freight-pooling to move assets more efficiently for both Tosca and our customers

Benefits to date include:

50% growth in dedicated third-party vehicles serving Tosca operations and customers across Europe, leading to better workflow management, lower empty miles, and better customer satisfaction

20% shorter distances that the Tosca assets have to travel

7% further improvement in cube efficiency through the creation of the “perfect pallet”

7% reduction in emissions from upstream and downstream transportation logistics in NA

~2M truck miles reduced through intermodal logistics in 2025

In 2025, we instigated a new data collation process to feed our SDMRS. This process better captures logistics data, business travel data (flights, car rentals, and hotels), and other supply chain data such as product and service procurement, waste management, and new equipment purchases, all of which are vital for accurate Scope 3 emissions reporting. In 2026, we will implement a central travel management system in EMEA, allowing us to obtain increasingly accurate data on our business travel.

What’s ahead

01. Further reduce stretch wrap usage to optimize EPR fee reduction outcomes

02. Advocate for reusables and recycled content amounts through the RPA and RPE to shape realistic regulatory standards

03. Expand implementation of energy efficient equipment and lighting

04. Continue research into cost-effective internal water reuse or recycling options

05. Continue to streamline our fleet and logistics efficiency

06. Advance supplier sustainability actions and emissions data reporting for accurate Scope 3 reporting



Together in team engagement



2025 highlights

Teamwork is key to Tosca's success. Our people are our greatest asset. Their collective passion makes our product innovations, operational improvements, and excellent customer service possible.

1,479
team members globally

+20
employee net promoter score

>200
professional development courses available in our Learning Management System (LMS)

1 in 3
senior leadership positions held by women

100%
of staff attended at least 1 training session

19
charities donated to through Tosca Cares

3.66
training hours per team member on average

Together in team engagement

Category	2030 Goal	Progress in 2025–2026
Health and Safety	• Continuously strive to maintain injury frequency rates below industry benchmarks	• Reportable injury rates remained well below the industry standard accident rate for the 5th consecutive year
Human Rights/Fair Labor Practices	• Track and address our human rights risks	• Reviewed and revised our human rights risk assessment to confirm the continued applicability of our 2024 Human Rights Policy • Submitted our 4th UK Modern Slavery Statement, available on the Tosca website
Recruit, Develop, Retain/Career Planning/Inclusion	• Support the professional and personal growth of our team members by offering best-in-class upskilling opportunities and fostering an inclusive workplace where our team members feel able to contribute as their authentic selves • Team member career development and upskilling to support operational advancements, resulting in increased retention of staff with more than 5 years of service	• Refocused job descriptions, candidate outreach, and selection processes in early 2025 to attract a wider range of applicants • Introduced structured onboarding for salaried staff: first-day welcome plan and 30/60/90-day engagement covering team introductions, systems orientation, and role processes • Expanded upskilling for existing team members through an HR SharePoint hub with customer experience training plans • Executive team members and their direct reports received 6 hours of professional development at the annual leadership offsite • Focus on high-potential team members
Workplace Culture/ Engagement/ Community	• Provide targeted charitable donations through time, goods, or money to address local needs and local or global disaster relief initiatives • Foster a culture of contribution in which team members are fully engaged and consistently strive to deliver Tosca's values	• Expanded the Tosca Cares initiative by providing each facility with the ability to donate directly to a charity of their choosing under a facility giving initiative: Tosca Giving. Nineteen charities were supported with total donations exceeding $10,000, including Down Syndrome Ireland, Teenage Cancer Trust (UK), Moeders voor Moeders (Belgium), the German Red Cross, Ronald McDonald House Charities (US), Salvation Army (US), Paul's Pantry (US), Operation Lunchbox (Atlanta), and Aladina and Aladina Fundacion (Spain) • A range of local volunteer and giving events held by offices and service centers including food drives, backpacks for kids, charity walks and runs, and clothes donations

Building a passionate workforce

We believe talent can come from anywhere, and our process is designed to find it.

In 2025, we refocused job descriptions, candidate outreach, and selection processes to attract a wider range of applicants.

We also transformed our NA onboarding with a new "first day experience" approach, featuring personalized welcomes and team introductions.

New hires follow a structured 30-, 60-, and 90-day plan that facilitates internal networking and mentoring and sets clear expectations while embedding Tosca's sustainability priorities from the start.

In EMEA, we introduced a "buddy system" where every new hire or person transitioning into a new team or role is paired with an existing team member for the first 3 months. The buddy serves as a role model, offering advice and encouragement to help the newcomer adjust to their role and team, navigate company policies and procedures, share tips, and act as a sounding board.

In 2025, our "memorable moments" was also expanded to celebrate or recognize significant milestones and life events both at work and in team members' home lives.

Our 2025 workforce

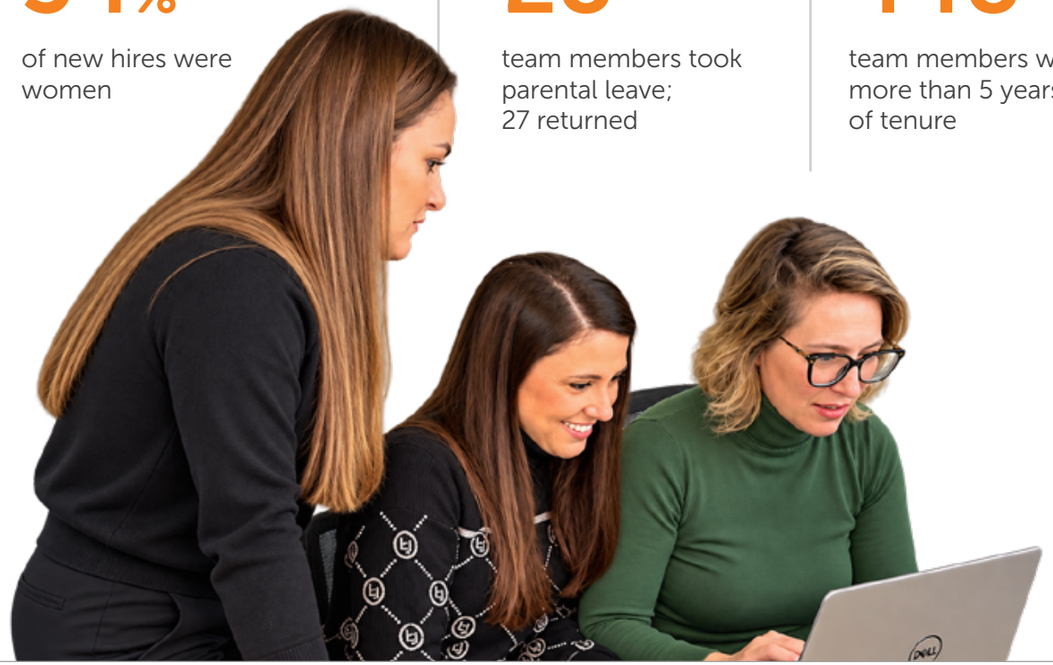
34%
of new hires were women

28
team members took parental leave; 27 returned

448
team members with more than 5 years of tenure

7
hours on average of training per team member in the US

1:1
pay parity across the organization



Our careers website does not simply highlight vacancies at specific Tosca locations; it also shows all the support Tosca provides to our team members.

One of those support areas is our overall compensation and benefits packages, which we strive to make best-in-class.

Our benefits framework

Our benefits are designed to align our support offerings with the skills and talents we seek to nurture.

- Standard global benefits include hybrid schedules and paid tuition.
- In NA, our 401(k) plan offers a 100% match on contributions up to 6% of salary.
- In EMEA, we provide competitive packages tailored to the specific requirements of each country.

TEAM MEMBER SPOTLIGHT

Kristin Devaney
General Manager, Norton Facility

"Since becoming the site manager and being able to engage with different Tosca team members and even customers, my view of sustainability has really changed. I've learned it is much bigger and more involved than I first thought, although at the core it's still about how we care for the planet, reduce waste, and protect the people and places where we live and work.

At our site, even small changes like using reusable cups, plates, and utensils have helped reduce waste and brought the team together around a shared purpose. And it's that team and their attitude who inspire me and make me happy to come to work everyday. One person may not be able to change the world alone, but together we can be part of the solution."



Developing and engaging our team at every turn

To stay at a job, team members need to feel challenged and valued and know there is a promising future ahead.

At Tosca, we continuously invest in helping team members build meaningful careers, grow in their current roles, and prepare for their next opportunity.

Learning and development

200+

courses are available in our online LMS

100%

of full-time exempt team members received a performance and career development review in 2025

LinkedIn learning

has thousands of expert-led video courses, is available to all staff, and is tied into our LMS

Tuition reimbursement

is available for approved degree programs and professional certifications

Succession planning

is a focus of our business continuity planning

SAP SuccessFactors, our cloud-based goal-setting and performance management platform, helps managers work with team members to identify exactly what they need to achieve their full potential.

Our global human resources data platform allows us to spot talent across the organization and align professional development to business goals. We are passionate about internal promotion, and team members can move through the ranks, bringing their experience with them.

Feeling our best to perform our best

Annually, we expand access to healthcare benefits and well-being programs. Team members have access to meditation, wellness, and movement sessions, financial tools, and family care resources. In the Atlanta office, we hold weekly "mindfulness minutes" to help team members relax and refocus during the day, while in our Schelle office, team members regularly go for lunchtime walks together.



The place people want to stay

Gallup Q12 engagement survey: Measuring progress against global peers

The 2025 survey results showed meaningful progress, driven by a deliberate focus on manager-team member relationships, consistent one-on-ones, career development conversations, and a values-driven peer recognition program.

> **With 93% of team members responding, the results showed 75% of respondents were happy in their workspaces, and 64% felt opportunities for career progression were clear. The mean engagement score also substantially increased from 3.77 to 4.08.**

One of our 2030 targets is to achieve a higher retention rate among team members with over 5 years' tenure.

Today
30%
of Tosca team members have more than 5 years of tenure





TEAM MEMBER SPOTLIGHT

Greg Dean

Today, Greg Dean is regional director of operations for the North America Central Region, but he joined Tosca 20 years ago as a temporary worker on the wash line. Since then, he has risen from general production operator, to team lead, to supervisor, to general manager, to where he is today.

> *"I have loved being part of Tosca because I have been given many opportunities to grow with the company. When I started, Tosca was much smaller, with only 2 locations. I have seen it grow into a global company with so many great people. My advice to team members looking to grow with the company is to be ready to lean in when opportunities arise. Tosca is a great place for that."*
>
> **Greg Dean**
> **Regional Director**, Operations, North America Central Region

Recognizing our team members

At Tosca, living our values, expanding our business, and improving our services and products through innovation is not just encouraged, it is systematically cultivated through our people. The Tosca recognition program honors individuals who challenge conventional thinking and voice bold ideas that spark meaningful change.

Every year, we host a “Toscars” ceremony to celebrate those who go above and beyond to live our company values and drive significant impact on the business. Across both EMEA and NA, we recognize teams and individual team members for outstanding sales performance, safety, sustainability, and the greatest impact on the organization. Over 30 people were recognized for their contributions to the business, to their colleagues, and to sustainability in 2025.
Key Toscars include:

- **Values Award**
  Awarded to individuals who best reflect our company values of Appreciation, Collaboration, Customer Focus, Expertise, Passion, and Reliability
- **Tosca Courage Award**
  A new award that honors individuals who challenge conventional thinking and voice bold ideas that spark meaningful change
- **Safety Award**
  Recognizing individuals and service centers who have achieved the highest safety standards
- **Salesperson of the Year**
  Given to the person who maintains the best customer relationships
- **Service Center of the Year**
  Celebrates the service center that excels in efficiency, team member engagement, safety culture, and its approach to sustainability
- **Sustainability Toscar**
  Awarded annually to the person or team leading the most impactful sustainability-focused project
- **Impact Award**
  Recognizes the person who has had the greatest and most wide-ranging impact on the business
- **Pinnacle Achievement Award**
  Our highest honor, for the team member who best exemplifies Tosca’s values
- **CEO Award**
  New in 2025, recognizing the individual who contributed most to the company over the year

Find out more about life at Tosca on our

Linkedin Page



Sustainability Week celebrates positive impact

2025 marked Tosca's 4th annual Sustainability Week, spotlighting our commitment to igniting transformative change and recognizing our team members' contributions.

We focused our celebration around our values, centering on collaboration as a central theme, driving sustainability through our values, and the actions we take across Tosca.

Sustainability Week

Monday	Tuesday	Wednesday	Thursday	Friday
22	23	24	25	26
Monday Our **Passion** for Protecting the Environment	Tuesday **Appreciating** our Local Communities	Wednesday Enhancing the **Expertise** of our Team Members	Thursday Using Tosca Assets and Services to **Reliably** support Tosca **Customers**	
✓ Put up stickers and notices on energy and water use ✓ Do one thing to better protect the environment	✓ Vote on a charity for Tosca Giving donations ✓ Participate in a planned donation or volunteer activity	✓ Talk to a colleague about their work or expertise ✓ Share a favorite dish reflecting personal or cultural heritage	✓ Learn about the products Tosca manufactures, washes, repairs, and shares with our customers ✓ Take a picture with one or more Tosca assets	







Pursuing our ‘safer together’ journey

Keeping team members, visitors, and contractors healthy and safe is fundamental. We believe that all accidents are preventable and take steps to foster shared safety responsibility, from providing leadership oversight to embedding best practices through training.

> **Safety is led from the top. Our regional presidents hold direct accountability, supported by dedicated EHS teams and risk-based regional programs. Our Global Health and Safety Policy sets universal expectations, enforced locally by NA safety committees and EMEA Safety Steering teams to ensure rigorous, consistent compliance worldwide.**

2025 safety performance

1.63
occupational injury rate vs. industry average of 5.0

1.02
lost-time incident rate vs. industry average of 2.1

$0
in fines or penalties for HSE non-compliance

Zero
fatalities globally across FY21–FY25

>90%
of global team members trained on 70 EHS topics in NA

Annual
health and safety day EMEA

Safety as a global priority

Several of our facilities have maintained recordable accident-free status for multiple years:

1 year	Norton, Massachusetts; Portage, Indiana; West Chester, Ohio; Salt Lake City, Utah; Ingolstadt, Germany; Salzkotten, Germany; Rathcoole, Ireland; Czeladz, Poland
2 years	Garland, Texas; Atlanta, Georgia; Zelik, Belgium; Bilbao, Spain; Featherstone, England; Brehna, Germany; Frechen, Germany
3 years	Denver, Colorado; Wakefield, England
4 years	Swadlincote, England
6 years	Langenhagen, Germany; Vienna, Austria
7 years	Regau, Austria

Our commitment to safety shows up in the milestones we celebrate and the programs we participate in. Each year, across all 18 US locations, Tosca participates in OSHA’s Safe + Sound Week, joining over 3,000 businesses to recognize the value of strong workplace health and safety programs.

In EMEA, we launched a dedicated annual Health and Safety Day in 2025. The EMEA EHS team also delivered a children’s coloring competition, a video contest for Tosca sites, and improved internal communications, including newsletters and Tosca TV updates.

Safety upgrades in our facilities included increased automation, eliminating the need for physical handling of assets thus reducing ergonomic injuries, replacing box wash systems in EMEA, and performing jobs safety assessments across the US.

Five years running below the industry benchmark. 1.63 injury rate against an industry average of 5.0.

“I like to go home each day knowing that I made a positive impact on our operation. I am extremely grateful for the opportunities Tosca has given me and feel like I have continued to grow with each promotion and added responsibilities.”

Matt Bright
General Manager, Tosca Service Center, West Chester Township, OH

Eliminating risk at the source

Each year in the US, we set a Companywide slogan to reinforce the idea that daily actions prevent injuries. This theme is incorporated in our annual training and bimonthly Spotlight on Safety presentations. Job safety assessments and full site safety assessments were conducted across all facilities in 2025.

Foundations of Integrity

In 2024, we refreshed our Corruption Risk Assessment to make it global and launched our global Anti-Bribery and Corruption (ABC) policy. Mandatory ABC policy annual training is now in place for relevant team members while more general ABC requirements are covered for all team members globally through our Code of Conduct (CoC) training.

100%

of required team members completed anti-bribery and corruption training in 2025

100%

of team members trained on the CoC in 2025







A neighbor who cares

We want to be an active part of the communities where we operate, working with our neighbors to build them up. This means giving back through meaningful acts of service, such as volunteering time, money, resources, and expertise, as well as partnering with local organizations.

Tosca Cares

In 2025, we expanded the Tosca Cares initiative to include a facility level "Tosca Giving" event, providing each facility with Tosca Dollars to direct to a charity of their choosing across both NA and EMEA.

$10,700 donated through Tosca Cares

This, along with other charity donations, volunteer event registrations, and support for team members in need, resulted in Tosca supporting more than $15.5K in giving in 2025. Charities supported included:

Down Syndrome Dublin · moeders voor moeders · Teenage Cancer Trust · Ronald McDonald House Charities · German Red Cross · Aladina Fundación

Supporting children with cancer in Milan

In 2025, our Milan office launched its first local charity events, including a fundraiser for Aladina Fundación, which supports children with cancer and their families. This effort marks the expansion of Tosca Cares into new regions, bringing our commitment to community support to teams that were not previously involved in formal giving.

Serving meals at the Ronald McDonald House in Atlanta

The Ronald McDonald House in Atlanta is very close to the corporate office's heart. We cook and serve meals at least twice a year, and there is stiff competition to be on the roster for these events. With the new, much larger facility now open, we intend to increase to 3, if not 4, times a year, if possible.



What's ahead



01.
Building a passionate workforce

- Launch a global leadership development program to strengthen management capability at every level including a soft skill improvement program for new leaders of people in the US
- Expand LinkedIn Learning access to support career development and internal mobility across all regions
- Add succession and development planning to our talent management cycle
- Extend our annual engagement survey to the depot level in EMEA for the first time, building on a global participation rate of 95%
- Develop a formal intern policy and program in NA

02.
Safe, healthy workspaces

- Establish quality, health, and safety coordinators at every site globally to drive safety accountability and support the rollout of health and safety initiatives locally

03.
Operating with ethics and integrity

- Embed CoC training into a quarterly cadence covering specific elements of the CoC to allow a deeper dive into the expectations and foster a real understanding of issues covered, across all regions
- Expand critical supplier engagement to create a more rigorous, standardized approach for assessing environmental and social risks and sharing best practices across our supply chain

04.
Caring for our neighbors

- Finalize and roll out the EMEA volunteering policy, establishing formal partnerships with local organizations
- Continue building on the Tosca Cares fund, with a focus on expanding awareness among new hires and growing team member participation in payroll giving
- Formalize committees in each corporate office to promote engagement and drive two Tosca Cares initiatives every year, with a greater focus on children in need

A word from our global head of sustainability

I truly believe sustainability is far more than a series of environmental commitments. It's all about business resilience. That is why it is woven into every part of how a business operates, from food safety and logistics to health and safety, talent, and the communities we serve.

At Tosca, our mission to eliminate waste at every turn reflects this perspective. That is why our 2030 sustainability strategy focuses not only on wasted materials and emissions, but also on eliminating wasted time, money, space, and opportunity.



A year of reflection and renewal

2025 was a significant year for how we think about our sustainability focus and strategy. We completed our most comprehensive materiality assessment to date, a double materiality process that engaged retail customers, supplier customers, our workforce, industry peers, and investors across the US, EU, UK, and Israel.

We also completed a formal climate risk assessment to further understand and implement actions to mitigate current and future climate-related risks. In addition, we established a comprehensive, rigorous approach to PPWR compliance and EPR registration and reporting, which benefits our customers as well as ourselves as these new pieces of legislation unfold across the EU, UK, and the US. We used this work to reevaluate our sustainability priorities, and we ended the year with a clear set of goals to achieve by 2030, along with a detailed supporting strategy.

I'm proud of the rigor we brought to all these processes and am encouraged by what they confirmed. Circularity has moved to the top of our industry's agenda, and all our work to date, along with our revised future focus, confirms that the path we have been on is the right one.

Impact across every dimension

What continues to inspire my work is how a philosophy of sustainability can address the many challenges and requirements in the packaging space, from reducing food damage, eliminating logistics miles, making handling safer, and meeting regulatory requirements to operational improvements, minimizing environmental impacts, and maintaining a sustainable supply chain. A sustainability-focused approach clearly shows that solutions should not be addressed as separate, disparate initiatives. They have to be considered and evaluated holistically. Ignoring any element impacts the total cost of ownership. Conversely, an integrated approach creates environmental, operational, financial, and deeply human benefits.

Looking ahead

I want to thank every team member, customer, and partner who shares this journey with us. When we work together across every part of the supply chain with honesty, data, and a shared commitment to doing better, the impact we create belongs to all of us.



Karin Witton
Global Head of Sustainability