

ENABLING TRANSFORMATION

Sustainability Report 2020



01 | INTRODUCTION

CEO'S LETTER



Sustainability has long been at the heart of who we are and what we do at Tetra Pak. Yet it's possible to look back at 2019 as being a pivotal year, in many ways. Expectations around sustainability reached an all-time high among customers, consumers, media, NGOs and regulators alike.

We also saw the outbreak of COVID-19, which has since been declared a pandemic by the World Health Organization. It is an unprecedented event affecting communities worldwide, and its full impact on the global economy and our industry has yet to be seen.

In this context, we remain committed to our promise to protect what's good, focusing on two priorities. Protecting people: keeping people safe, our own employees as well as those of our customers and other stakeholders. And protecting food: ensuring we help our customers maintain food supply for communities worldwide.

To achieve this, we are working closely with our customers, suppliers, governments and local authorities. We sincerely hope that with the combined efforts of the entire global community, normalcy will return soon.

FOOD, PEOPLE, FUTURES

Protecting Food, People and Futures are the three pillars of our sustainability approach – and the three chapters of this report. We start with Futures and our ambition not just to embrace, but to go beyond, the circular economy. We believe that it is not enough to think about issues such as waste and climate in isolation; we must look at them together.

That's why we are committed to a low-carbon circular economy: one that takes into account not just recycling and reuse, but also the carbon impact of manufacturing and raw materials. This approach is at the heart of

Planet Positive, an ambitious new initiative that we launched in 2019. Planet Positive is a new way of thinking that inspires business to take sustainability much further, so that our collective actions add up to solve some of our greatest environmental challenges.

ACCELERATED DEVELOPMENT

To that end, working alongside our customers, we accelerated our sustainability efforts in 2019. We significantly ramped up investment in product development, and forged numerous new partnerships with key stakeholders, particularly around recycling.

Our achievements include the launch of the first paper straws for carton packaging in Europe, an important step in our vision to deliver a package made entirely from plant-based materials.

We also became the first company in our industry to offer packaging with a fully traceable supply chain of plant-based polymers certified by Bonsucro, reinforcing our commitment to transparency in our solutions. And we passed a major landmark in our long-running relationship with the FSC™, surpassing 500 billion FSC™-labelled packages, reinforcing our commitment to promote responsible sourcing.

As we continued to strive to make our own operations a benchmark for sustainability and efficiency, two of our factories received World Class status for their WCM achievements. We continued to invest in renewable power and "green buildings". And we're making great progress towards our main climate goal: to cap climate impact across the value chain at 2010 levels despite business growth.

In the Food section of this report, we explore how digitalisation offers new opportunities to make food safety and quality

better than ever, while increasing production flexibility, efficiency and sustainability.

In 2019, we unveiled our vision of our "factory of the future", enabled by Industry 4.0 technologies. We also launched our connected packaging platform, which transforms our cartons into interactive information channels and digital tools.

We continued our participation in the development of school feeding and nutrition programmes, working with partners worldwide, as we have done since 1962. We also helped set up three new Dairy Hubs, increasing our customers' access to quality local milk and improving the livelihood of many thousands of smallholder farmers.

And finally, in the People section, we highlight our continued efforts to create a work environment that's diverse, inclusive, flexible, safe and healthy and that enables us continue to attract, retain, develop and engage the talent we need to achieve our ambitions. The results we achieved in these areas in 2019 are highly encouraging.

STRATEGY 2030

Another reason that 2019 was pivotal for us is that we launched Strategy 2030, which will guide our company over the next decade and beyond. As part of its development, we spoke with customers and industry experts about what the future world would look like.

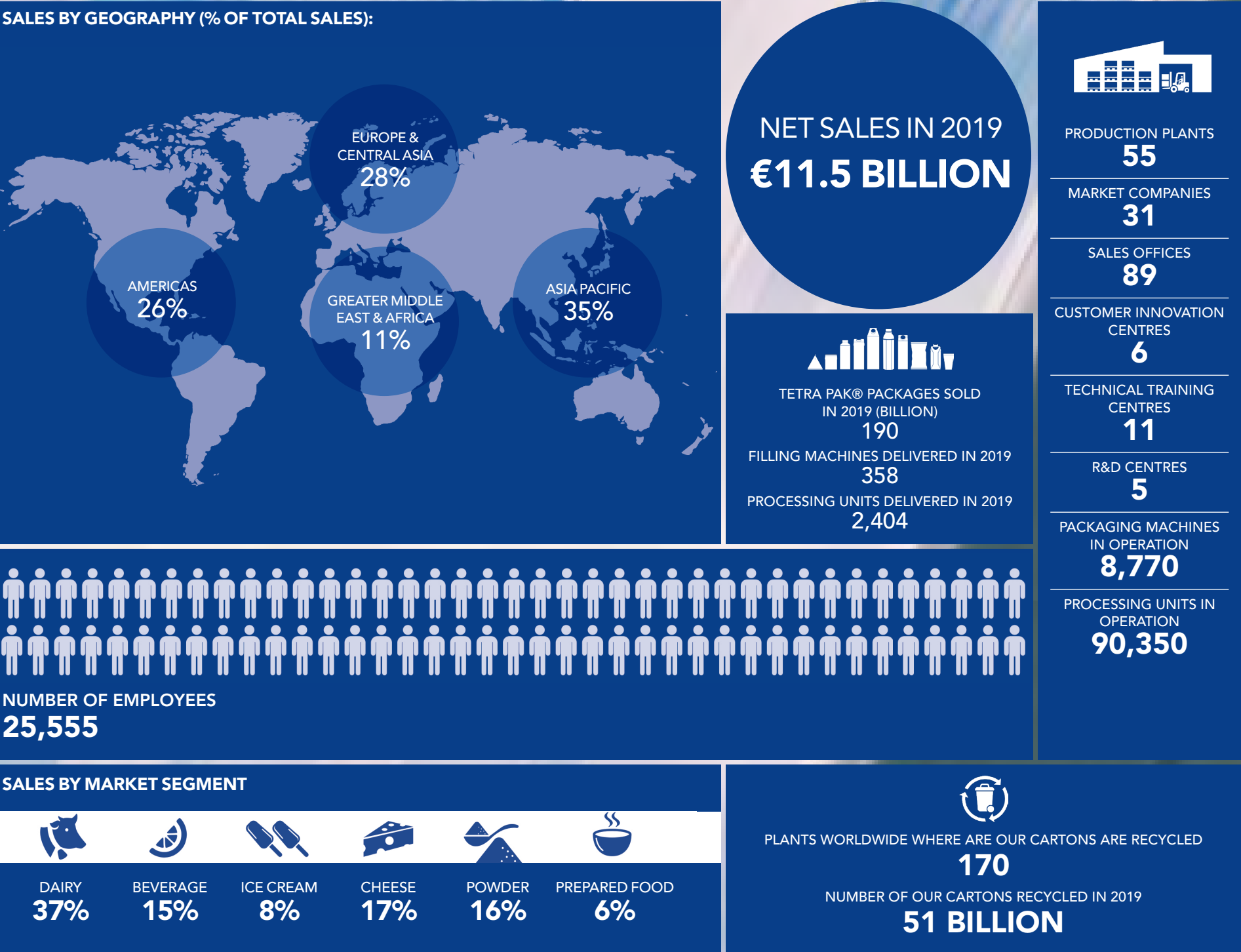
We learned that sustainability would be even more vital going forward. That's why one of the pillars of our new strategy is to "lead the sustainability transformation". I trust that you will see this approach already taking effect as you read through this report.

Adolfo Orive
President & CEO, Tetra Pak

01 | INTRODUCTION

FACTS & FIGURES

A round-up of key numbers from across our global business operations in 2019.



01 | INTRODUCTION

GOOD GOVERNANCE, TRANSPARENCY & REPORTING

At Tetra Pak, we equate good governance with good business: we do well by doing good. Good governance is essential to building a sustainable business within Tetra Pak, delivering on our brand promise – PROTECTS WHAT’S GOOD® – and safeguarding our reputation.

OUR GOVERNANCE FRAMEWORK

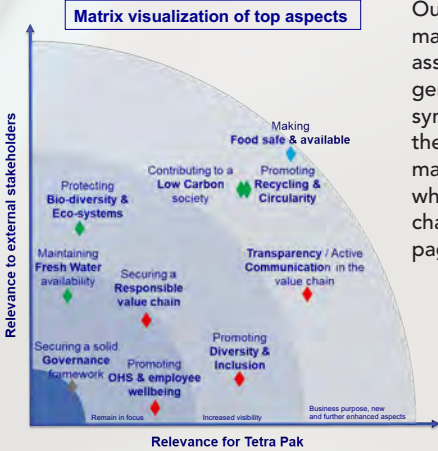


By providing the foundation for our strategy and approach to leadership, good governance ultimately helps us fulfil our vision to make food safe and available, everywhere. Our governance framework helps us deliver on our brand promise and comply with relevant regulations and legislation, as well as guide us to behave ethically and responsibly. The Global Leadership Team is responsible for implementing the framework, supported by the Corporate Governance Office and a network of local governance, risk and compliance officers. As signatories to the United Nations Global

Compact (UNGC) we are committed to the implementation, disclosure and promotion of its ten principles on human rights, labour, the environment and anti-corruption. We submit a Communication on Progress every year. To build trust and transparency with our customers and as part of our approach to responsible sourcing across our supply chain, we work with leading sustainability assessment platforms, including the Supplier Ethical Data Exchange (Sedex), EcoVadis and CDP. In 2019, we were rated as a leader by CDP for our climate action and for driving sustainable sourcing in our supply chain for

the fourth year in a row. We were also rated by EcoVadis in the top one percent of companies in our industry category. For more information on these ratings and our work to drive responsible sourcing and continuous improvement with our suppliers generally, see page xx. All employees, at all levels of the company, are responsible for complying with the governance framework in their everyday decisions and actions. Details of the framework are available on our intranet and a mandatory eLearning programme is in place. Anyone in the company can anonymously

report actual or suspected breaches of our Code of Business Conduct or any other unethical behaviour directly to either the Corporate Governance Officer or Head of Audit, without being penalised in any way. Every case of a breach of our Code of Conduct is handled individually and investigated appropriately. Communicating about our responsible business practices and performance is very important to us. We have been publishing environmental reports since 1999, and we have been reporting on broader sustainability issues since 2005.



Our latest biannual materiality assessment generated this synthesis, visualising the top aspects on a matrix and identifying where in the value chain they occur. See page xx for more.



OUR APPROACH & HIGHLIGHTS

We think and work in an integrated way to deliver on our brand promise and maximise sustainability value for our customers, for our business and for the communities where we operate. To organise and communicate our priorities, we use FOOD. PEOPLE. FUTURES. as the chapters of our sustainability story.

PROTECTING FUTURES

We work to support the sustainable future of our planet and the long-term success of our customers. We are committed to a low-carbon circular economy in which the entire value chain has minimal climate impact.



Our commitment to the UN SDGs



4

Number of years running we have made the CDP A-list for leading efforts against climate change and protecting forests

#1

First packaging company to launch paper straw in Europe. Also first F&B company offering packaging with Bonsucro-certified chain of custody for plant-based polymers

69%

Percentage of renewable energy in our operations

10 million

Tonnes of CO2e saved across the value chain over the past decade

x2

Growth in number of Tetra Pak factories with World Class WCM status

51 billion

Number of Tetra Pak packages recycled

PROTECTING FOOD

We work with our customers and partners to make food safe and available, everywhere through our innovative and market-leading food processing and packaging solutions.



Our commitment to the UN SDGs



68 million

Number of children who received milk or other nutritious projects in Tetra Pak packages in schools

56

Number of countries in which we participate in school feeding programmes

3

Number of new Dairy Hubs added

36,420

Number of smallholder farmers reached by Dairy Hubs

PROTECTING PEOPLE

We safeguard and empower our people, and are working towards greater diversity and inclusion. Our Code of Business Conduct has high standards for both our own business and for our suppliers.



Our commitment to the UN SDGs



+14%

Increase of women in top management

-8%

Reduction in lost time accidents in our manufacturing sites

29%

Percentage of women external hires

750

Number of leaders trained in inclusive leadership

148

New participants enrolled in our global Future Talent programme

93%

Percentage of respondents in Employee Engagement survey who say they fully support Tetra Pak values



02

FUTURES

BEYOND THE CIRCULAR ECONOMY

We are committed to a low-carbon circular economy in which the entire value chain has minimal climate impact: one that takes into account not just recycling and reuse, but also the carbon impact of manufacturing and raw materials.

OUR COMMITMENTS

- We will launch a paper straw in 2019.* (Achieved: see xx.)
- We will work with partners to increase recycling of PolyAl, the non-fibre components of a beverage carton package.* (See xx.)
- We will use recycled plastics content in our packages by 2025, subject to when suitable food-grade recycled plastic is technically and economically available.* (See xx.)
- We will use recycled plastics content in our secondary packaging and distribution material in the near future.* (See xx.)
- We will use recycled plastics once they are validated as safe and are legally acceptable for use as a food contact material.*+
- We will work with industry partners to ensure that by 2030, recycling solutions are in place for all components of beverage cartons so they can be recycled across Europe.†
- We will substantially increase the use of plastics made from renewable feedstock.†

* New Plastics Economy Global Commitment
+ EU Plastics Strategy commitment

In a circular economy, manufacturers design out waste, reuse and recycle materials and regenerate natural systems to reduce impact on the environment. We believe that this approach is an essential part of sustainability today. That’s why in March 2019, we signed the Ellen MacArthur Foundation’s New Plastics Economy Global Commitment, which is founded on circular economy principles. (This commitment builds on previous pledges, such as our support for the EU Plastics Strategy: see left.)

However, we believe that this approach needs to go further. It is not enough to think about issues such as waste and climate in isolation; we must look at them together. This is why we are committed to a circular economy that also has a low-carbon focus: one that takes into account not just recycling and reuse, but also the carbon impact of manufacturing and, particularly, raw materials.

In a low-carbon circular economy, the whole value chain is optimised for minimum climate impact. This means operations that are powered by renewable energy, manufacturing processes that are highly efficient and logistics that reduce fuel use.

It also takes into account the positive impact of plant-based renewable raw materials, which can reduce carbon emissions as they grow and are reused and recycled. For example, it has been estimated that in Europe, forests and the forest-based bio-economy could capture 25% of current CO₂ emissions.

Indeed, we believe that everything a business does should have a positive impact on our planet. So in 2019, we launched our Planet Positive initiative. It’s a new way of thinking that inspires business to take sustainability much further, so that our collective actions add up to solve some of our greatest environmental challenges.

Planet Positive guides our approach to forming the partnerships and collaborations which are now so vital to bringing about meaningful change. It is also highly practical. Through our sustainable end-to-end offering, we support our customers as they work to transform their business and realise their own sustainability ambitions. See below for more information.



Planet Positive

In 2019, we published a hands-on guide to helping our customers transform their business sustainably in four steps. Click to find out more about our Planet Positive sustainability offering.

[CLICK HERE](#) 



OUR PLATFORM

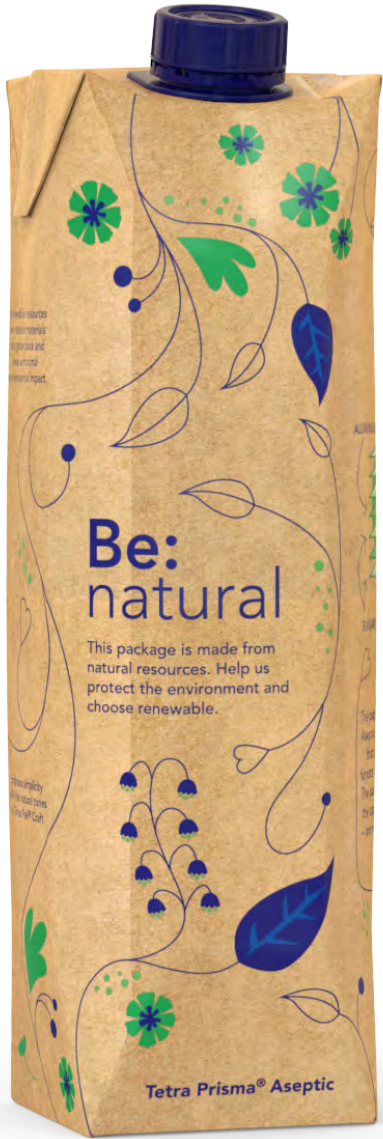
We have been working for many years to reduce the environmental impact and increase the renewable content of our packages. And, post-consumption, to promote their collection and recycling around the world. As a result, our circular portfolio platform is already strong.



STANDARD ASEPTIC PACKAGE

- ~75% materials from renewable sources
- 100% paperboard from FSC™-certified and/or controlled sources
- Lower carbon footprint than alternative packaging (IFEU LCA meta-analysis)
- Recyclable and increasingly being recycled at more than 170 sites worldwide

In July 2019, we became the first carton packaging company to launch paper straws in Europe. We expect to industrialise production to meet total global demand by 2025.



TETRA BRIK®ASEPTIC 1000 EDGE WITH BIO-BASED LIGHTCAP™ 30

- First aseptic carton package certified for surpassing 80% renewable material
- Up to 23% reduction in CO₂ emissions compared with a standard Tetra Brik® Aseptic package

FULLY RENEWABLE PACKAGE: TETRA REX® BIO-BASED

- First beverage carton package in the market made only from renewable packaging materials
- Up to 35% reduction in CO₂ emissions, compared with standard Tetra Rex® package
- Multi-award winning



OUR ROADMAP

In 2019, we made a step change in our development efforts to restructure our packaging portfolio innovation strategy around our vision of the ideal beverage carton: a fully renewable and recyclable package.

FOUR KEY R&D FOCUS AREAS

While we have already achieved a great deal, the next stages in our packaging development journey are truly transformational, particularly around the structure of the packaging material itself. Arguably, this is the biggest change since the aseptic package was first introduced in the 1960s.

In 2019, we consulted extensively with our customers to ensure that our visions were aligned. Then we significantly accelerated development around sustainability in our packaging and additional material, boosting our investment tenfold in this area.

1. RENEWABLE PACKAGE

Vision: To increase the share of renewable materials, removing layers of fossil-based plastic and/or replacing them with plant-based alternatives.

Workstreams/stages

- Further develop and deploy plant-based products
- Develop and launch fully renewable aseptic carton package (see timeline)

What we did in 2019:

- We made significant investment so that all our European factories are now capable of plant-based lamination.
- We continued development work to extend our 100% bio-based offering to other products in our portfolio.

2. RECYCLED CONTENT

Vision: To use recycled polymers and paper in all our packaging materials, while never compromising food safety.

Workstreams/stages

- Primary packaging (beverage cartons and openings/closures)
- Secondary packaging

What we did in 2019:

- We initiated a close supplier collaboration to explore utilising recycled content in paperboard.
- We collaborated with customers on recycled content in secondary packaging in certain markets.

3. ANTI-LITTERING OPENINGS

Vision/approach: This has been a priority area, driven by legal compliance and customer demand. In addition to contributing to our wider goals around renewability and recycling, the aim is to develop innovations that address litter.

Workstreams/stages

- Paper straws
- Non-detachable alternatives
- Biodegradable straws
- Tethered caps

What we did in 2019:

- We became the first carton packaging company to launch paper straws in Europe.
- We are also exploring other biodegradable materials for straws.

4. ENABLE RECYCLING BY DESIGN

Vision: To change the packaging material structure in order to make post-consumption packages more valuable to waste recyclers. Consequently, they will find it more economically worthwhile to collect and process our material, thereby improving circularity.

Workstreams:

- Explore new packaging material structures
- Develop smart packaging that enables collection, sorting and recycling

What we did in 2019:

- We delivered our first ever filling machine for aluminium-free aseptic packages and the solution is now being field-tested.
- We joined a major European consortium called Holy Grail 2.0 to commercialise new recycling sorting technology (see page xx).

THE JOURNEY TO A FULLY RENEWABLE ASEPTIC PACKAGE



2011
Bio-based caps



2015
Fully renewable chilled package



2017
Aseptic package with highest renewable share



2018-20
Deployment of bio-based coating and Tetra Pak® Craft



2020
Market trial with alternative barrier



2022
Commercial launch of aseptic package made fully from renewable sources

PARTNERS IN INNOVATION

Collaboration is fundamental to our approach to innovation going forward, underscored by a key goal of our new Strategy 2030: “Establish a Strong Partner Ecosystem”. We’re now exploring new ways of accessing the myriad new competences and ideas necessary for success, beyond our traditional supply partners.

One example is working with start-ups. For example, since 2017, we have been working with Plug and Play, one of the world’s largest and most established start-up accelerators. As a result, we are now

actively engaged with more than 10 start-ups identified as having the expertise we need. In 2019, Plug and Play launched a new two-year accelerator programme in two focus areas: Sustainable Economy (split into Circular Economy and Water); and Plastic Waste. These are highly relevant to our own sustainability ambitions and we’re now exploring the opportunities they offer.

We’re also now doing more lateral collaboration and open innovation with universities and research platforms. One example is Treesearch, a collaboration between

academia, industry and private foundations that focuses on how to make new sustainable materials from forest resources, such as new types of barrier materials and mouldable alternatives to plastic.

Through this kind of engagement, we can access some of the most advanced X-ray and neutron technology in the world, in the shape of MAX IV (pictured) and the European Spallation Source (ESS), located right on our doorstep in Lund. This will be a significant aid to furthering our understanding of new materials going forward.

We have joined Holy Grail 2.0, a major European consortium which aims to commercialise a new technology based on “digital watermarks” for accurate sorting of materials into the correct recycling streams. Embedded in a carton product’s design, the digital watermarks are virtually invisible to the human eye, but can be read by scanners and mobile apps to make collection and automated sorting faster and more accurate. As a result, materials will be put back into the circular economy more efficiently and with much higher reuse quality.



02 | FUTURES

ENHANCING SUSTAINABILITY ACROSS THE VALUE CHAIN

Responsible sourcing is the right thing to do as a business. Our customers demand fully transparent supply chains, and we expect the same from our own – that's why we are always working to ensure responsible sourcing and ethical practice across all our suppliers.



This is the fourth year in a row we have been rated as a leader by CDP's annual environmental disclosure and scoring process, widely recognised as the gold standard of corporate environmental transparency.

We are one of 179 companies – just 2% of the many thousands scored – recognised as a leader for actions to cut emissions, mitigate climate risk and develop the low-carbon economy. We are also one of just eight companies identified as a leader in preventing deforestation in supply chains via sustainable sourcing.

We were also in the top 1% of companies assessed by EcoVadis in its Manufacturer of Special Purpose Machinery industry category; in the top 1% in Environment; in the top 1% in Sustainable Procurement; and in the top 4% in Labour and Human Rights.

Responsible sourcing is a strategic objective for our procurement organisations. All our centrally and locally managed suppliers must endorse the Tetra Pak Code of Business Conduct for Suppliers and comply with its requirements.

We regularly check performance against these commitments through desk-based assessments and on-site audits, followed up by improvement activities. We also expect our suppliers to demonstrate continuous improvement in their own operations and across their supply chains. These activities are part of our procurement processes and our Corporate Governance Framework.

As part of the continuous improvement of our responsible sourcing approach, in 2019, we did the following:

- We enhanced our partnerships with third parties, such as Sedex and EcoVadis, to optimise the coverage of assessments across our supplier base, using a risk-based approach.
- We increasingly collaborated with suppliers in follow-up activities to ensure that they take any necessary actions identified, thereby driving continuous improvement.
- We selected a new supply chain risk management system that integrates third-party data, such as from EcoVadis, with artificial intelligence and media screening. This allows continuous monitoring, strengthening our responsible sourcing and supplier risk management activities.
- As part of the transformation of the Supplier Management organisation, we created a central governance function, working alongside purchasing categories to set strategies and provide expert support in the areas of sustainability, compliance and risk management.
- Our mandatory responsible sourcing requirements are now embedded in our "Sourcing Critical Terms" guidance, which ensures that they are covered in all supply contract negotiations.
- We improved our criteria for selecting suppliers that we assess, building on both category and country risk, as well as supplier dependency and strategic importance. Going forward, we will further strengthen our category approach, to ensure we address the most relevant risks and opportunities with our suppliers.
- We updated our mandatory responsible sourcing training, included in the Tetra Pak Academy for the attention of all employees involved in procurement.

BASE MATERIALS

In addition to the measures outlined on the previous page, we apply even stricter criteria for the suppliers of the 3.1 million tonnes of base materials (paperboard, polymer and aluminium) that we source every year.

Our management process for base material suppliers includes setting reduction targets for CO₂ emissions, and we report supplier performance against these. We focus on improvement opportunities and allocate purchasing to maximise carbon footprint reduction.

Our goal is to use as much sustainably sourced, plant-based renewable raw material as possible. Materials such as wood-fibre and sugar cane are essential to our low-carbon circular economy approach.

Currently, our aseptic packages are composed of three base materials: paperboard, polymers and aluminium, all of which play a key role in protecting and preserving food.



PAPERBOARD: 75%

Paperboard makes up the bulk of our packages and its responsible sourcing is critical to continue to avoid deforestation. Although we don't own or manage any forests, we apply our purchasing power to promote sustainable forest management and protect biodiversity.

We do this by working together with suppliers, NGOs, customers and other stakeholders to promote responsible forest management and demonstrate traceability through independent certification and labelling.

In 2019, we reached the major milestone of having helped our customers to produce more than 500 billion FSC™ (Forest Stewardship Council™) labelled packages since 2007 (Tetra Pak FSC licence code is FSC C014047).



POLYMERS: 20%

Our packages have thin layers of polymer, or plastic, to prevent moisture getting in or out and to keep the product inside fresh. Polymers are also used in our caps, closures and straws.

Our ambition is for all our packages to use renewable and/or recycled polymers, or alternative fibre or cellulose-based materials, with no further extraction of fossil feedstock necessary. However, there is much work still to be done before renewable polymers can fully replace traditional fossil-fuel based polymers, since the industry to convert the raw materials is still embryonic.

In October 2019, in partnership with our long-term supplier Braskem, we became the first company in the sector to obtain Bonsucro Chain of Custody certification (see next page for more).



ALUMINIUM: 5%

Although wafer-thin, the aluminium layer inside our aseptic package is responsible for about a third of the climate impact of our base materials. Working to replace this layer is a development priority.

In the meantime, as a founding member of the Aluminium Stewardship Initiative (ASI), we are working to address the issues around aluminium at an industry level. Along with Rio Tinto Aluminium, BMW, Nespresso, WWF and the International Union for the Conservation of Nature, we have set global standards that raise the bar for aluminium production, environmentally and socially.

In 2019, we helped ensure that six more of our ten aluminium suppliers became certified for the ASI Performance Standard. The final two suppliers are due to be certified in 2020. We also helped ensure that four of these suppliers were certified for ASI Chain of Custody (CoC). We expect ASI CoC certification to extend across all our aluminium suppliers by the end of 2020.

CURRENT BASE MATERIAL RESPONSIBLE SOURCING OBJECTIVES, DERIVED FROM OUR CUSTOMERS' NEEDS

- Full traceability for our raw materials
- Certification and third-party verification
- No direct or indirect negative land use change
- Promote diversity, reforestation and regeneration

GOING BEYOND: OUR OBJECTIVES FOR 2030

- Going beyond certification to minimise sourcing risk, such as by using satellite sensing to monitor forests
- Going beyond “do no harm” to lead our industry by positive example



25%

of land under sugarcane globally is certified by Bonsucro

57 million

tonnes of the world's sugarcane is certified annually by Bonsucro



1

Sugar cane is cultivated on large plantations in the southeast of Brazil, far away from the rainforest, where it absorbs CO₂ from the atmosphere as it grows.



2

After being harvested, the sugar cane is crushed and its juice is captured, fermented and distilled to produce ethanol.

3

The ethanol is dehydrated into ethylene, which is then polymerised to polyethylene.



4

The polyethylene is used to make components including caps, laminate film which have the same properties as ordinary polyethylene and can be recycled in existing recycling streams.



BONSUCRO CHAIN OF CUSTODY CERTIFICATION

In October 2019, Tetra Pak, in partnership with our long-term supplier Braskem, became the first company in the sector to obtain Bonsucro Chain of Custody certification. The certification reinforces the existing Responsible Ethanol Sourcing Programme from Braskem with traceability of the entire sugar cane value chain, all the way back to the growers and mills. All our products made from plant-based polymers will be delivered to customers as Bonsucro certified from March 2020.



OUR OPERATIONS

As we strive to lead the sustainability transformation, we want our own operations to be a global benchmark. This means maximising efficiency and minimising waste through World Class Manufacturing, using and investing in renewable power, and certified “green buildings”.

WORLD CLASS MANUFACTURING

In 2019, we celebrated 20 years of World Class Manufacturing (WCM), a systematic approach to reducing waste, minimising water loss, improving efficiency and reducing energy consumption. Applied across all our operations, it has led to a 62% reduction in total waste and a threefold increase in productivity since 1999.

Today, we are considered a world leader in WCM. In 2019, our factories in Hohhot, China and Lahore, Pakistan (pictured opposite) were awarded the highest level of the prestigious Total Production Maintenance (TPM) awards by the Japan Institute of Plant Maintenance – a first for any plant in these countries.

This World Class award is presented to facilities that have achieved outstanding levels of production quality, reliability, efficiency and environmental performance. This is the third time in five years that our facilities have received this award, following the successes of our Gornji Milanovac factory in Serbia and the Izmir factory in Turkey in 2015 and 2017 respectively.

Only 24 plants in the world have achieved World Class status: Tetra Pak facilities represent a remarkable sixth of this total. Out of the 30 Tetra Pak packaging material factories currently in operation worldwide, 27 have received one or more TPM awards.

62%

Reduction in total waste since WCM began in 1999

3x

Increase in productivity

90%

Percentage of Tetra Pak factories with TPM awards

4

Tetra Pak factories with World Class TPM status



GREEN BUILDINGS

High priority brownfield site, requiring clean-up of mines

Electric car charging stations available

Solar panels contribute to RE100 target

Overall water saving between 42% and 66% per building and 100% outdoors

Climate control ensures pleasant working environment

Energy saving solutions reduce consumption by up to 36%

31 species planted on site. Nearly 35,000 sq m restored using native vegetation

In addition to our production processes, the quality of our buildings makes a significant difference to the sustainability of our operations. In all new projects and major fit-outs, where possible, we now aim for Gold level certification from LEED (Leadership in Energy and Environmental Design), a leading international certification standard. Even when we choose a small office, sustainability and accreditation of the building is a key deciding factor.

In July 2019, we inaugurated Vietnam's first-ever aseptic carton packaging material factory in Binh Duong. Our eighth factory in the Asia-Pacific region, the €120 million new facility has an expandable capacity of 20 billion packs per annum to supply both domestic and export markets in ASEAN, Australia and New Zealand. It is one of the first factories in Vietnam to be certified Gold according to the latest, most demanding LEED Version 4 certification. (See the annotated image, right, for an overview.)

Additionally, our factory in Chakan, India is currently in the process of renewing its LEED Gold certification. Certification is also under way for parts of our factories in Kunshan and Hohhot in China, and Modena in Italy.

In October 2019, we opened our new head office in Shanghai, China. Again, sustainability was key to the choice of building and fit-out. Located within a LEED Platinum-rated development, the newly remodelled 7,600 sq m office has been awarded LEED Gold certification for its interior design and construction.

Also in October, we announced the opening of a €25 million site with sales, engineering and manufacturing facilities for cheese production solutions in Olsztyn, north-eastern Poland.

The site was designed and constructed in full compliance with requirements laid out by the Building Research Establishment Environmental Assessment Method (BREEAM), another well known and respected international standard.

RENEWABLE ENERGY

In 2019, renewable electricity use across our operations increased from 55% in 2018 to 69%. We are on track to meet our RE100 targets of 80% by 2020 and 100% by 2030. All of our converting factories within the EU are already now using 100% renewable electricity.

We commissioned a total of more than 1600 kW of solar photovoltaic capacity at our factories in Rayong, Thailand and Denton, USA (pictured). This represents over 5,000 solar panels.

Our total energy use has been kept relatively flat in recent years. It has grown by just 2% since 2010, despite significant increases in production and the addition of new facilities, thanks to improvements in energy efficiency.

Our energy audit programme is a major contributor to this increased efficiency, realising total energy savings of 345 gigawatt hours since 2010, and avoiding what would otherwise have been a growth in energy use of 23%.



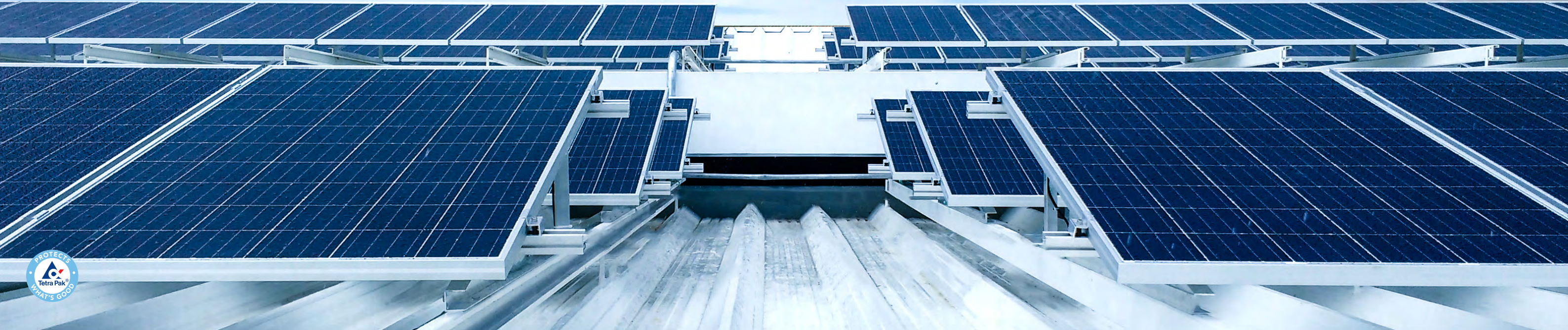
600 kilowatts
New photovoltaic capacity at Denton plant



1,000 kilowatts
New photovoltaic capacity at Rayong plant

69%
Percentage of renewable electricity supplied to our operations

8
Solar photovoltaic installations on Tetra Pak factories





02 | FUTURES

CUSTOMER OPERATIONS

Helping our customers succeed in their increasingly ambitious sustainability agendas is at the heart of our own 2030 strategy, which aims to enhance sustainability across the value chain.



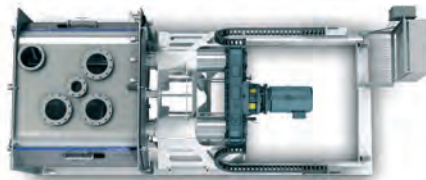
Tetra Pak® Processing Solutions, Equipment and Services are highly focused on minimising water use, food waste and carbon footprint reduction in our customers’ operations, helping them on the journey towards achieving their ambitious targets in these areas. Here are some of the key developments during 2019.

- In Q1, our Water Centre of Expertise in Silkeborg, Denmark started providing our customers with water recovery and savings assessments. Ways in which we can help our customers minimise their water footprint include: a hygienic treatment solution for standardising supply water with minimal water loss; process water recovery solutions for the dairy industry; and on-site water reuse and recovery assessments. The Centre has been working with Carlsberg at its site in Fredericia, Denmark to develop a solution that reduces water waste in carbonated soft drink water production by almost 100%.
- At Hannover Messe in April, we announced a full-site energy assessment programme in collaboration with ABB to help food and beverage producers lower their environmental impact and cut costs. Based on pilot projects in the Americas, the programme can potentially reduce carbon emissions and energy costs by 15% to 25%.
- From the start of 2020, production at our customer CONO Kaasmakers’ cheese-making plant in Beemster, the Netherlands has been officially certified as climate neutral. As communicated in our 2017 Sustainability Report, we supported CONO Kaasmakers’ ambition to build “the greenest dairy in the world”, providing the most advanced water and energy recovery solutions and minimising product losses.

At Davos in January 2020, we launched the food and beverage industry’s first full-scale virtual marketplace. Created in partnership with Mirakl, the marketplace is open 24/7 and hosts more than 300,000 spare parts and consumables from Tetra Pak as well as 200,000 products from vetted sellers, giving customers access to a large variety of products in real time. Click to watch the video and find out more.



KEY EQUIPMENT LAUNCHES IN 2019



TETRA PAK® SEPARATOR H80 WITH AIRTIGHT AND ENCAPT™

The latest in a line of the most environmentally sound separators ever made, reducing energy consumption by up to 40% and water use by up to 20%.

How AirTight works:

A water lock seal below the separator bowl and a hermetic outlet seal combine to prevent air inclusion and product overflow, ensuring that the separator runs smoothly, delivering the highest product quality and the lowest possible energy consumption.

How Encapt™ works:

Two pumps suck out the air around the spinning separator bowl, lowering pressure and reducing air friction – a major cause of energy consumption. Dual bowl speed reduces energy consumption still further when the machine is not running product.

[CLICK HERE](#)

TETRA PAK® TUBULAR HEAT EXCHANGER WITH P2P

This unit saves a significant amount of the energy typically required for steam and cooling in a product-to-water (P2W) heat exchanger. Overall energy consumption is up to 55% lower compared with a conventional P2W unit, and its insulation capabilities also reduce heat loss by up to 67% compared with P2W alternatives.

[CLICK HERE](#)

TETRA PAK® STANDARDISATION UNIT WITH CONTINUOUS PROTEIN CONTROL

The industry's first in-line standardisation analyser, developed in partnership with FOSS, experts in milk analysis. This new solution utilises automation hardware and software algorithms that react and adjust in real time, offering unique guaranteed ratio performance. It delivers key data accurately every seven seconds, enabling quicker reaction times to ensure on-specification product quality 24/7. The benefits for customers, especially producers of cheese and powder, include significantly better standardisation performance for fat-to-protein ratios, uniform product quality, improved sustainability and elimination of uncertainty associated with manual sampling.

[CLICK HERE](#)

TETRA PAK® POWDER MIXER RANGE EXTENSION

Powder-to-powder mixers are key elements in food production lines and one of the biggest equipment investments producers make – but cleaning them has previously been a time-consuming and costly affair. This unit delivers the industry's fastest dry cleaning and lowest downtime, allowing energy consumption significantly lower than the competition due to its design and automated power control.

[CLICK HERE](#)

BEST PRACTICE LINES FOR YOGHURT PRODUCTS

A suite of expert services that support a wide variety of yoghurt innovations to address growing consumer demand. The best practice lines support the design of customised solutions for five types of yoghurt products: stirred, set, drinking, concentrated and ambient. These are specific sets of guidance which can be tailored to match the particular production needs of different types of yoghurt.

[CLICK HERE](#)

TETRA PAK® CERTIFIED RENOVATED EQUIPMENT

Another way that we have built circularity into our portfolio is through our Tetra Pak® Certified Renovated Equipment (CRE) business, which we introduced in 2018. We define CRE as previously used capital equipment that has been renovated and certified according to a single global quality standard. CRE fulfils circular economy principles, thereby reducing scrappage, and means customers can buy equipment with certified performance at an economical price, while still benefiting from our global service and support. In 2019, we delivered 172 CRE machines, comprising 57 filling machines and 115 items of downstream equipment.

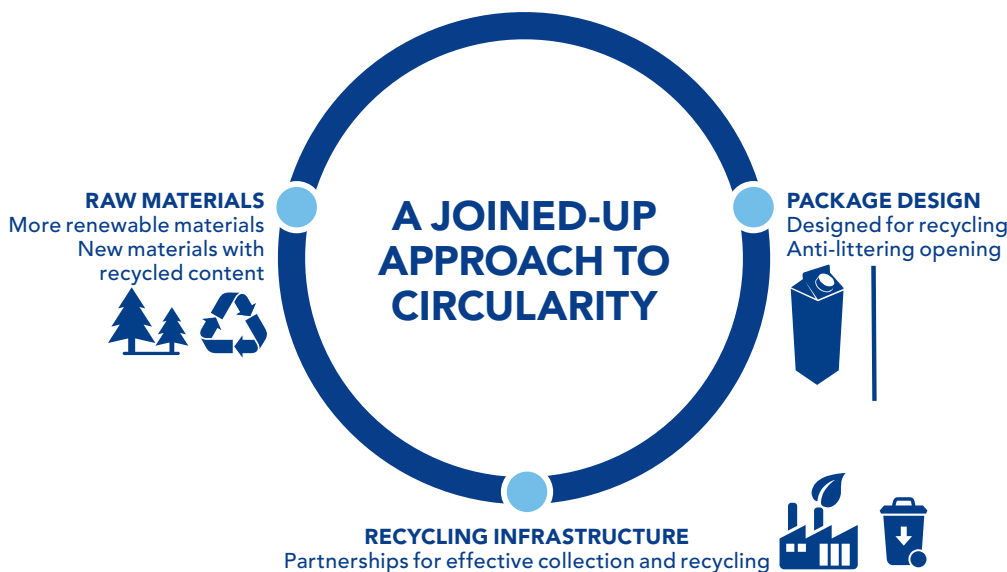


PROMOTING RECYCLING & CIRCULARITY

Recycling is one of the key enablers of a low-carbon circular economy. We have been driving development of collection and recycling infrastructure in all of our markets for many years, investing more than €20 million between 2012 and 2018. We have helped to grow the number of facilities that recycle beverage cartons worldwide from 40 in 2002 to more than 170 today.

As a key part of Strategy 2030, we are now working in an ever more holistic way, focusing both on recycling and recyclability in the design of our packaging, at the same time as accelerating our efforts to drive infrastructure development to improve collection and recycling.

Today, we have around 50 people focused on this all around the world. The experience, expertise and contacts we have developed over the years is crucial to accelerating our work. But we cannot do this on our own. When it comes to advancing collection and recycling on the ground, partnership is the game-changer. Here are some of the ways we are leading transformation through collaboration.



- 51 billion**
Tetra Pak packages recycled in 2019
- 26.5%**
Percentage of total Tetra Pak packages recycled in 2019
- 170**
Number of plants worldwide recycling Tetra Pak packages
- 77**
Number of Tetra Pak markets with used package collection

RECYCLING PLANTS AND EXAMPLES OF INITIATIVES AROUND THE WORLD

UK
Jersey Dairy first in the UK to introduce 100% renewable Tetra Rex® Bio-based package for its basic milk products.

MEXICO
Leading recycled paper maker Bio Pappel launches video showcasing how our packages are recycled.

TURKEY
New Zero Waste Project aims to meet and teach 280,000 children about protecting nature and recycling.

THAILAND
Ten-year anniversary of Green Roof Project, which turns recycled cartons into roofing sheets to provide emergency shelter for people in need.

Click to find out more about these and other stories. [CLICK HERE](#)

- Fiber (97)
- PolyAl (38)
- Integrated (41)

WORKING TOGETHER

1. Individual customer partnerships

We work closely with our customers to help them achieve their own ambitions in this area. A good example is Nestlé, who we are working with in four ways:

1. Developing packaging for the future. We are continuously updating our R&D and portfolio strategic direction, and consulting with them to ensure alignment.
2. Helping shape a waste-free future. We are working to scale up collection and recycling collaboration in prioritised markets through our partners and existing platforms.
3. Driving new behaviour and understanding. We are integrating sustainability information, such as recycling messages on-pack and online.
4. Fostering collaboration, communication and engagement. We are working on a joint advocacy plan in prioritised markets, including participation in associations and collaboration platforms.

2. Global industry alliances

Building on our contribution to existing alliances such as the New Plastics Economy

and the Alliance for Beverage Cartons, in 2019 we worked to advance three new initiatives.

- Launched in July 2019, the 3R Initiative is a first-of-its-kind global effort designed to reduce, recover and recycle the growing amount of plastics generated by companies. It creates a transparent standard ensuring robust and consistent measurement and reporting of projects that reduce plastic in the environment. Uniquely, it also creates a “plastic crediting” mechanism that motivates companies to maximise the recycled content of the plastic they use and also incentivise recycling activity. We are a co-founder of 3R along with Danone, Veolia and Nestlé. It is led by international standard-setter Verra and environmental market developer BVRio, both non-profit organisations.

- In November, we became a founding member of 4evergreen, a new alliance that aims to boost the contribution of fibre-based packaging in a circular and

sustainable economy. The alliance will increase awareness of the benefits of fibre-based packaging materials, advocate for EU legislation supporting product design for recyclability and call for the development of optimised collection systems and appropriate recycling infrastructures. The first members include a number of our customers, suppliers and competitors, Nestlé, Danone, Stora Enso, SIG Combibloc and Elopak.

- Tetra Pak is a participant of the Consumer Goods Forum Plastic Waste Coalition of Action, which is in the process of outlining and agreeing ambitious deliverables around product design, extended producer responsibility (EPR), advanced recycling and collaborative initiatives in priority markets.

3. Local alliances

In addition to our global initiatives, we work to increase recycling on a local level through our cluster and market activities. Read more on our website.

[CLICK HERE](#) 



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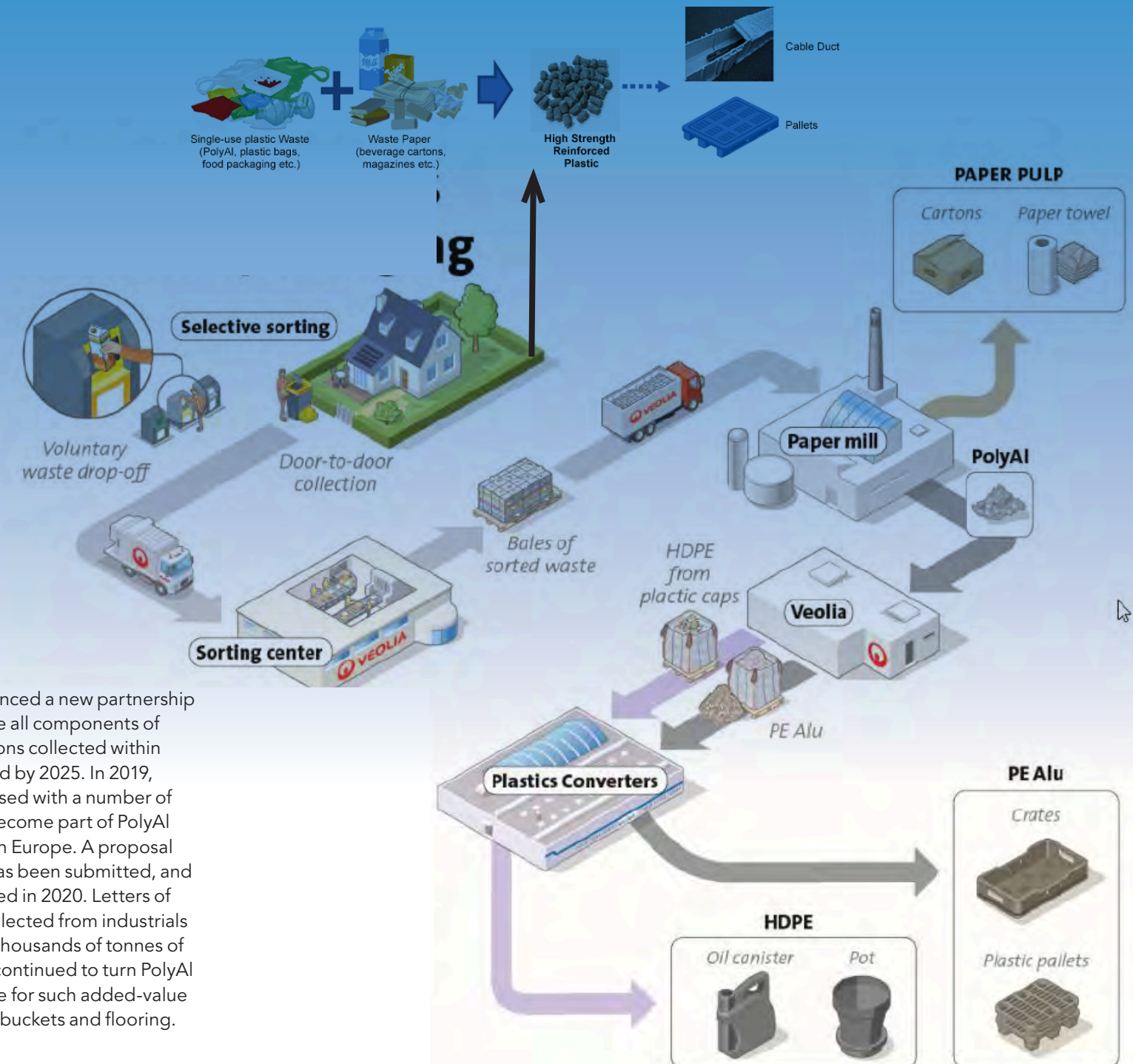


RECYCLING PARTNERS

All our packages are recyclable and can be transformed into a wide range of new products. But more needs to be done to enhance the value of the recycled materials from our packages, so that they can be turned into industrial products with high value and large volumes. This is particularly true of PolyAl, for which recycling capacity and increased value is currently lacking on a large commercial scale. We are working with a growing number of recyclers and other recycling chain stakeholders to develop viable and sustainable business solutions. Here are two examples:

- For the past three years we have been acting as a key knowledge partner and contact facilitator with Furukawa Electric, also introducing them to our recycling partner Veolia (see below). In May 2019, Furukawa announced a breakthrough new technology that can combine plastic and paper waste in a single process to make a material comparable to glass-fibre-reinforced plastic, but at a much lower cost. Furukawa started utilising the material made from the new technology in its own commercial product soon after the announcement.

- In 2018, we announced a new partnership with Veolia to enable all components of used beverage cartons collected within the EU to be recycled by 2025. In 2019, discussions progressed with a number of major recyclers to become part of PolyAl recycling solutions in Europe. A proposal for the first facility has been submitted, and a decision is expected in 2020. Letters of intent have been collected from industrials representing many thousands of tonnes of PolyAl. Testing has continued to turn PolyAl into an asset suitable for such added-value products as pallets, buckets and flooring.



03

FOOD

FOOD SAFETY & QUALITY

Our vision is to make food safe and available, everywhere. Now, faced with the COVID-19 pandemic, food safety is more important than ever. But the way we go about delivering our vision is changing, due to the rise of digitalisation and connectivity. These trends offer new opportunities to make food safety and quality better than ever, while increasing production flexibility, efficiency and sustainability.



Since launching the Tetra Classic® Aseptic carton in 1961, we have come up with hundreds of new packaging solutions that protect food without the need for a cold chain, saving energy use and minimising food waste. In 2001, Tetra Recart® was the first carton to pack traditionally canned foods, significantly saving on distribution costs and carbon footprint due to its light weight and efficient shape.

We are also pioneers in food safety technologies such as juice pasteurisation and UHT treatment. We are continually finding new ways to help our customers respond to challenging market conditions and consumer demands around the world.

For example, in 2019 we received the prestigious IFU Innovation Award

for our long-term project to develop a groundbreaking new sustainable JNSD line that can reduce energy consumption by 67% and water consumption by 50%. Currently in pilot, the target is to move into industrialisation and launch this year.

Our Food Safety Policy commits us to maintaining the highest standards of safety and achieving full product traceability through the entire food processing and packaging value chain.

We back this commitment in a number of ways, including through the development of automated solutions such as Tetra Pak® PlantMaster, a factory-wide control system that fully and seamlessly integrates intelligence from each unit of the dairy production line. For more on digitalisation and connectivity, see the next page.

“We challenged ourselves to set really ambitious goals to rethink and redesign the traditional JNSD line. From the very beginning of this project, we believed it must be possible to develop a more sustainable solution and at the same time guarantee food safety. The success of the project is a result of team effort, with many dedicated people at Tetra Pak involved.”

**Maria Norlin, Subcategory Manager,
JNSD & Other Beverages**



DIGITALISATION & CONNECTIVITY

Digitalisation and connectivity is changing the food and beverage industry as we know it. It offers unprecedented opportunities to increase food safety and quality, as well as production flexibility and efficiency.

In 2019, we unveiled our vision of the “factory of the future”, in which digitalisation revolutionises the way food manufacturing plants operate, continuously increasing the speed of production, reducing errors and minimising product waste.

Developed with partners including Microsoft, ABB and SAP Elettric80, it utilises Industry 4.0 technologies such as big data and advanced analytics, artificial intelligence and the Industrial Internet of Things. It builds on our existing digitalisation measures, such as Tetra Pak® Plant Secure and condition monitoring, which predicts and prevents system breakdowns before they occur.

Also in 2019, we launched our connected packaging platform (see right), which transforms our cartons into interactive information channels, full-scale data carriers and digital tools. For our customers, the connected package offers end-to-end traceability

to improve production, quality control and supply chain transparency. For consumers, it means the ability to access vast amounts of information such as where the product was made, the farm that the ingredients came from and where the package can be recycled.

We followed up these new launches with a series of technical thought leadership papers to help our customers benefit from Industry 4.0 in such key areas as food safety and quality, productivity and flexibility. We also launched a dedicated website called Connecting the food industry.

[CLICK HERE](#)



03 | FOOD

FOOD AVAILABILITY

We have long worked to increase the world's access to safe food. Since 1962, we have participated in the development of school feeding and nutrition programmes, working with partners worldwide. More recently, we have developed our Dairy Hub model to secure a long-term supply of locally produced quality milk without increasing the cost of collection.



We believe the most effective way to tackle global food security and nutrition challenges is to build sustainable food value chains. For more than 57 years, we have proven the value to society and individuals of participating in the development of school feeding and nutrition programmes around the world.

Such programmes have proven to be effective in delivering improved nutrition and better educational outcomes, supporting local agriculture and promoting economic development. According to the UN World Food Programme, they are making a significant contribution to the UN's Sustainable Development Goals, in particular SDGs 1, 2, 4, 5, 8 and 10.

Effective practical implementation is key to achieving the best possible results. In those parts of the world that face significant challenges in infrastructure and logistics, our food processing and packaging technology plays a vital role in ensuring that children can access safe nutrition in schools.

We offer our partners technical assistance and practical support in implementation

and evaluation, and advise on food safety and quality control. Through collaboration and partnerships, for example with UN agencies, governments, NGOs and international aid agencies, we share knowledge and best practice drawn from programmes worldwide.

We have a strong background in supporting our customers in developing and launching new fortified and nutritious beverages for programmes.

Environmental education and best practice in recycling carton packages also form an important part of the support we offer. For example a new school milk programme launched by the government of Sri Lanka is raising awareness of environmental issues, including recycling, at the same time as tackling child malnutrition and promoting growth in the local dairy sector.

In 2019, 68 million children in 56 countries received milk or other nutritious beverages in Tetra Pak packages in their schools.

Click to find out more about the new Sri Lanka school feeding programme and other recent initiatives.

[CLICK HERE](#)



SCHOOL FEEDING PROGRAMME

68

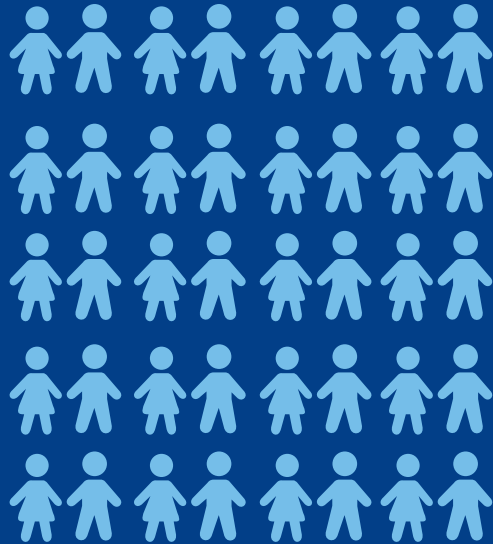
million children

56

countries

9.4

billion Tetra Pak packages



DAIRY HUBS

14

Dairy Hub projects
since 2013

3

new Dairy Hub
projects in 2019

36,420

smallholder farmers
reached in 2019

+27%

Dairy Hub projects
since 2013

389,470

litres milk / day collected from smallholder
farmers from Dairy Hub projects in 2019]



DAIRY HUBS

Global demand for milk is set to overtake supply within the next decade. In the long term, the dairy industry is facing a persistent gap between supply and demand – a supply deficit fuelled by population growth and rising prosperity and urbanisation, particularly in Africa, Asia and Latin America.

As nearly 1 billion people live on dairy farms, smallholdings or in landless households keeping one or a few animals, the dairy industry holds huge potential to create jobs and increased incomes right the way along the value chain.

According to the International Farm Comparison Network (IFCN), of the 867 million tonnes of milk produced globally, 360 million

tonnes are produced by smallholder farmers. Much of that milk is not formally processed, and is lost, thus limiting their access to market.

Through our Dairy Hub model, we help to build sustainable value chains by linking smallholder farmers with dedicated processors in a selected area. Tetra Pak and Tetra Laval then provide technical assistance and “hands-on” practical knowledge transfer through our international dairy experts.

By providing smallholder farmers with training and setting up appropriate cooling infrastructure and technology, dairy processors in developing markets can increase their stable supply of locally produced quality milk. This helps

them to grow their business and increase profitability by creating a more efficient local supply chain (see graphic below for how this works). At the same time, thousands of smallholder farmers gain access to market for their milk, improving their livelihoods.

Three new Dairy Hubs were set up in 2019, in Albania, Tanzania and Uganda, bringing the total number of smallholder farmers reached by the programme to 36,240. This represents a 27% increase compared with 2018.

Click to find out more about these new Dairy Hubs and others.

[CLICK HERE](#)



04

PEOPLE

INCLUSION, DEVELOPMENT & FLEXIBILITY

Our biggest asset is our people. We believe that becoming a more modern and attractive employer is key to attracting and retaining the talent we need to achieve our Strategy 2030 ambitions.



CREATING AN INCLUSIVE WORK ENVIRONMENT

We recognise the value of diversity and we strive to ensure an inclusive work environment and equal opportunities for all. As we work to achieve this ambition, we focused on three key areas in 2019:

BUILDING AWARENESS AND SKILLS

- We trained 750 leaders in inclusive leadership and we will continue this in 2020 to ensure that all our leaders have been reached. Feedback from participants was very positive.

DRIVING D&I ACTIONS

- All our business organisations have built specific action plans around diversity and inclusion (D&I). Many of these focus on closing gaps in the area of women in leadership and providing growth opportunities for all.

Clusters and market companies are also now systematically focusing on D&I to ensure that any specific local issues are addressed.

MEASURING D&I

- We measure D&I through our Diversity Dashboard and Inclusion Index.
- On our Diversity Dashboard, we are seeing some positive trends in gender diversity: the number of women in leadership positions continues to increase; the percentage of women hires is trending up; and participation of women in learning is high. We are also

seeing the number of women in our talent pools slowly growing. Work is still needed, though, to bring about a step change, not least as the talent pool of women in sciences generally remains small.

- On our Inclusion Index, which is based on the results of our Employee Engagement survey, we have not seen the progress that we had hoped to see. Questions and comments from respondents point to a number of areas where we need to increase our focus in order to create an even more respectful environment (see next page).

14%

Increase in women in top management

750

Leaders trained in inclusive leadership



FLEXIBLE WORKING ARRANGEMENTS

We continued to roll out flexible working arrangements (FWA) throughout 2019 and we now have policies in place in all countries with more than 50 employees, nearly doubling the previous total. Overall, employee reaction is highly positive: 51% have requested FWA in the last 12 months, with flexible time and place being top of the list, and 66% of FWA workers report a boost in productivity.

The most frequently cited benefits are better work-life balance and less time spent on commuting. However, while the Employee Engagement survey is positive, comments show there is still room for improvement in how supportive we are of FWA and in mitigating some of the potential negative consequences, such as long hours and difficulty “switching off”.

LEARNING AND DEVELOPMENT FOR ALL EMPLOYEES

With the creation of Strategy 2030, our learning focus has increased, as building the right capability to deliver moves centre stage. Accordingly, we did the following:

- Built a new set of leadership behaviours – Create Dynamism, Drive Productivity, Build Capability – to enable future success.
- Started work on a comprehensive leadership development portfolio.

- Completed our onboarding programme, which is now available to all newcomers.
- Launched LinkedIn Learning to all employees, which exceeded expectations with 56% take-up and an average 90 minutes of usage.
- Our pilot of driving a continuous feedback culture to support learning was successful and the approach has now been launched to the whole organisation.

HIRING AND DEVELOPING FUTURE TALENT

Our Future Talent graduate leadership programme continued in 2019. We hired our third annual cohort, with 148 participants joining us around the world, bringing the total to 487.

Since the programme began in 2017, 268 participants have completed the programme and are continuing their journey of growth at Tetra Pak; only 30 have left us. We are now using the programme to continue to strengthen both our national and gender diversity and our fourth round of recruiting for 2020 has started.

EMPLOYEE ENGAGEMENT

Having engaged and productive employees is key for us, especially as we work towards achieving our Strategy 2030 ambitions. In 2019, we conducted our biannual Employee Engagement survey, which generated a number of pleasing results, including:

- A high participation rate of 87%, our highest ever.
- Our overall engagement score remains stable at a high level.
- Employees continue to believe in our values (see opposite).
- Improvements in career development and performance management.

87%

Participation rate for our Employee Engagement survey – our highest ever

EMPLOYEE ENGAGEMENT SURVEY RESULTS: OUR VALUES ARE OUR STRENGTH

93%

“I fully support the values for which Tetra Pak stands”

90%

“When I am at work, Tetra Pak is committed to ensuring my health and safety”

92%

“I believe Tetra Pak is environmentally responsible”

90%

“Tetra Pak provides a working environment that is accepting of differences in cultural background or lifestyle”

SIX ACTIONS TO IMPROVE INCLUSION BASED ON SURVEY RESPONSES:

1. Monitor KPIs and drive gap closure
2. Communicate and engage on inclusion
3. Build inclusive skills and behaviours
4. Expand growth and development opportunities
5. Attract diverse external talent
6. Secure local focus, as required



SAFE & HEALTHY WORKPLACES

In the face of COVID-19, protecting our people is more important than ever. In addition to measures to ensure this, we made good progress towards our ultimate goal of zero accidents and work-related ill health.



DRIVING A CULTURE CHANGE

In May 2019, we launched the Occupational Health and Safety (OHS) Culture Change Programme, built around the following three elements and rolled out across the whole organisation:

1. A Fair & Just (F&J) culture

This aims to build an environment of trust and fairness where it is safe to report and learn from mistakes, errors and system flaws, but where violations of safety rules are not tolerated. F&J places more responsibility on all employees, from workshop operators to managers.

2. Life-Saving Rules (LSR)

These nine rules (see graphic below) have been developed from the major hazards that employees in our manufacturing, services and project organisations are likely to be exposed to.

3. "STOP! Are you in the danger zone?"

Because we cannot cover everything in nine rules, the F&J and LSR are accompanied by a campaign to raise awareness of any and all potential risks.



COVID-19 RESPONSE

The COVID-19 outbreak has been an unprecedented event, affecting communities worldwide. In this context, extraordinary measures have been needed to ensure we can continue to deliver on our promise to protect what's good. This includes making changes in our own facilities and in our operations with customers, and leveraging our resources to support the supply of safe and nutritious food (see video left for more).

SAFETY PERFORMANCE

Compared with 2018, lost time accidents fell by 8.5% across the global organisation and

by 33% in our manufacturing sites. Lost time accidents involving contractors fell by 44%. However, there was an increase in lost time accidents for employees working at customer sites, particularly in Services.

A number of initiatives are under way aimed at ensuring that there are fewer accidents in 2020. These include ongoing rollout of the Culture Change programme, a new project focused on chemical safety, and improved training and awareness.

In 2019, 1,300 employees took the "field force basic OHS training". The remaining 3,000 employees working at customer sites will complete the course in 2020, and more

than 800 project and site managers will attend the Project Managers course.

HEALTH AND WELLBEING

We appointed Laura Mohomed as our new Global Health & Wellbeing Manager. Her priority is to roll out our Global Mental Wellbeing Programme to new countries beyond the 14 already participating.

TRAVEL SECURITY

We appointed Shaun Taylor as Global Travel Security Manager. The COVID-19 outbreak and recent security issues in the Middle East have shown us just how important this area is.