

Jay explains why Corsair Amplivo NOW - 13 July 2025

TRANSCRIPT

All right. As I was saying, we live in a world today where production of new plastic in one year alone weighs more than the combined weight of every single human being on the planet. If you think about it, factories around the world are pumping out plastics more than the weight of humanity in just one single year, and out of all of those plastics, today 95% ends up in landfills, gets burned, or leaks into our oceans.

Ninety-five percent is not recycled in any way, which also means that 95% is an opportunity for someone. I've always believed that the larger the problem, the larger the opportunity, and I don't know what else there is in the world at the moment that would hold such an opportunity as plastic pollution.

Additionally to this existing situation, the production of plastic is expected to triple in the next 30 years, which truly means that if we don't urgently create effective and efficient plastic recycling infrastructure around the world, we are literally going to drown under all of this plastic waste. For us, as Magnus explained, that is an opportunity, because we have the solution to convert this plastic garbage into a high-quality product which we then supply to our customers such as Shell and other petrochemical companies.

For you, as a person who is looking at our business and considering this as a potential opportunity, it's important to understand that we are no longer a start-up company. We have been successfully operating our core business for five years, converting plastic garbage into oil. I still find that quite a lot of people don't even know that all of the plastic products we use were originally made from oil. Over the last five years, we've been successfully converting plastic into oil, which we supply to the plastic manufacturing industry for them to create new, circular and more environmentally friendly plastics. That's the core of everything we're doing.

When we think about timing, I don't know any other business opportunity right now that holds such promise, due to the global rollout of regulations where every single company producing plastic is becoming legally obligated to take responsibility for its plastic waste footprint.

These are part of a global regulation and agreement signed by more than 175 countries, including Sweden, where countries have decided to develop and put into place rules whereby any company that uses plastic in packaging must also remove from the environment the same amount of plastic waste. It's very simple: if your company creates plastic pollution, you are obligated to work with somebody who cleans the pollution—exactly as it has been done with carbon credits since the 1990s.

The vehicle between the polluter and the cleaner is the plastic credit, again exactly like carbon credits. We are going to see a global rollout of these regulations in the next 12 to 24 months. We've already seen moves in countries like Indonesia, the Philippines, South Africa, and a lot of development in the United States.

When you do your own research on the topic, which I urge you to do, look at what the big money players are doing. Are the big institutions and banks already involved? You might find it interesting that last year the World Bank, together with Citi, launched a \$100 million plastic

credit bond—a fund investing \$100 million into plastic credit projects. This shows the direction the world is moving. It is unique to be in a situation where we, as private individuals and a group of entrepreneurs, have the solution—not to solve the global plastic waste problem alone, but to be part of the solution.

For the last five years we have proven day by day that we know what we're doing; we are the fastest-growing company in our field when it comes to plastic waste advanced recycling. As Mongus mentioned, we have factories in Thailand and now also in Finland, which we warmly invite you to visit. We are established, proven on the market, and have a great track record.

We also have a unique situation where every major international organisation—from the United Nations and the European Union to the United States and the World Bank—is 100% aligned that together we must end plastic pollution.

The easiest way to do that is to place monetary value on plastic garbage. If you want to stop people throwing plastic into the environment, put a value on that plastic. If it's worth money, somebody will pick it up—guaranteed. That's exactly what is being done at the moment with plastic credits.

The use of plastic credits, which until today has been a voluntary decision by companies, is now becoming mandatory. Any company that pollutes will legally have to take responsibility for its plastic waste footprint, and we can expect large international demand for plastic credits. The opportunity is that this is not only reserved for banks and big institutions; every recycler—including us and others—can create these credits and, by doing so, receive extra funding for their work. Plastic waste now has a monetary value.

This is the revolution. In the next 30 years, the plastic waste problem will be solved. Plastics will be recycled exactly as metal, glass and paper are today. It will take time—about 25 to 30 years—but it will happen. As part of that, an estimated \$1 trillion annual market will be created around plastic waste recycling and plastic credit programmes. There will be a number of billion-dollar companies and a large number of very wealthy people created through plastic waste recycling—and especially through plastic credits.

Today, less than 5% of plastics in the world are recycled, and only a small fraction of that is currently part of any credit programmes. That means there are very few credits on the market. With even just a few large consumer brands becoming legally obligated to use these credits, what do you think will happen to their value?

The good news is this is already happening; there are well-known brands that have started using plastic credits. It's not something that might happen—it is going to happen. It's that simple.

From our point of view, we see a simple world developing before our eyes: plastic becomes a valuable raw material; the companies that pollute pay the ones who clean; and, through Corsair's operations and the Amplivo network, everyone can be part of this new, emerging market.

If you join us as a customer and help us remove more plastic waste from the environment, you receive those benefits. If you're part of the Amplivo network and you help us reach and serve more customers, you are not only helping to clean the planet but also earning handsomely for your work.

It's also worth saying that everything we're discussing—plastic credits, recycling and the wider development—is going to happen with or without any of us on this call. That's a good thing: we have a chance to be part of a completely new economy where plastic garbage becomes a valuable material, and we are at the forefront of that market.