

The background of the entire image is a dark, starry space. In the center, there is a complex industrial machine, possibly a laser cutting or welding station, with a bright orange and yellow glow emanating from its core. Numerous bright orange sparks are flying outwards from the machine, creating a dynamic and energetic scene. The machine is constructed from metal frames and various mechanical components.

# THEMA

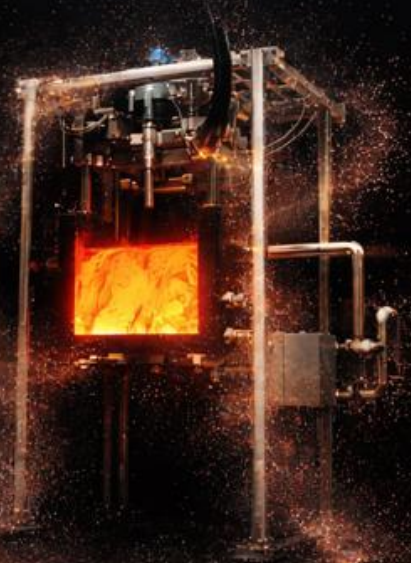
**INNOVATION FOR ENVIRONMENTAL SECURITY**  
Proprietary Solutions for Critical Needs

> TUESDAY, 14 APRIL 2026

> LONDON, UNITED KINGDOM



# AGENDA

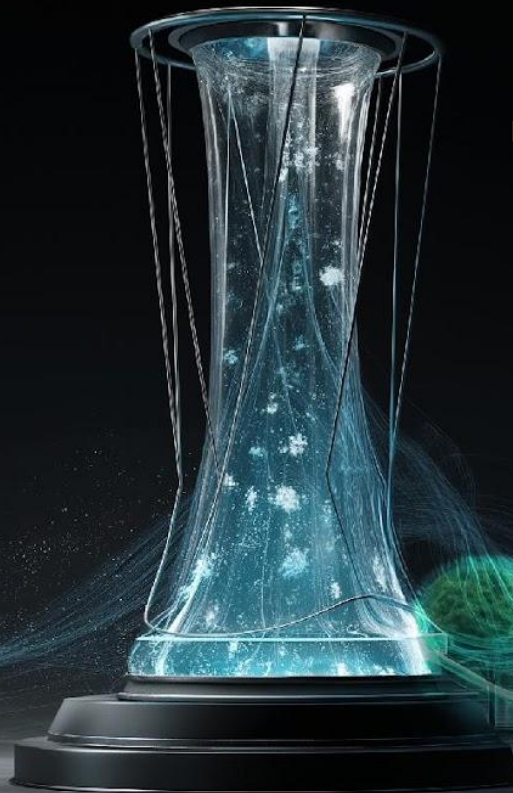


- 1** VEOLIA: AN INNOVATION POWERHOUSE FOR ENVIRONMENTAL SECURITY
- 2** SECURE THE FUTURE OF CRITICAL RESOURCES FOR INDUSTRIES
- 3** SECURE THE FUTURE OF ESSENTIAL SERVICES FOR CITIES
- 4** ROUNDTABLE: INNOVATION & AI INDUSTRIES

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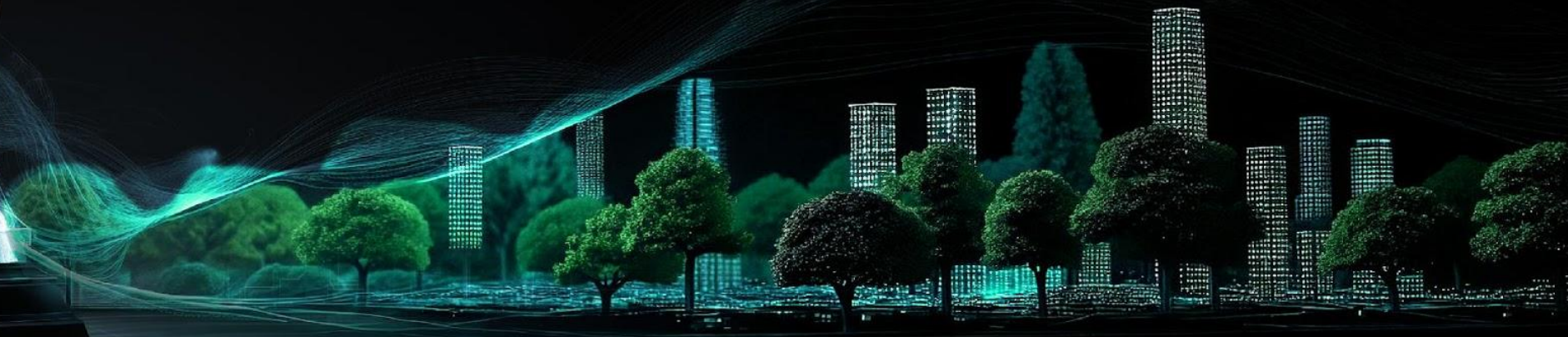
**Estelle BRACHLIANOFF**  
Chief Executive Officer, Veolia

**Emmanuelle MENNING**  
Deputy CEO in charge of Finance, Veolia



1

# VEOLIA: AN INNOVATION POWERHOUSE FOR ENVIRONMENTAL SECURITY



# Geopolitical and Technological Reset Underway

## Global Megatrends



# Veolia, the Environmental Security Powerhouse

Proprietary Solutions for Critical Needs

## Innovation for Environmental Security

### SECURE THE FUTURE OF CRITICAL RESOURCES FOR INDUSTRIES

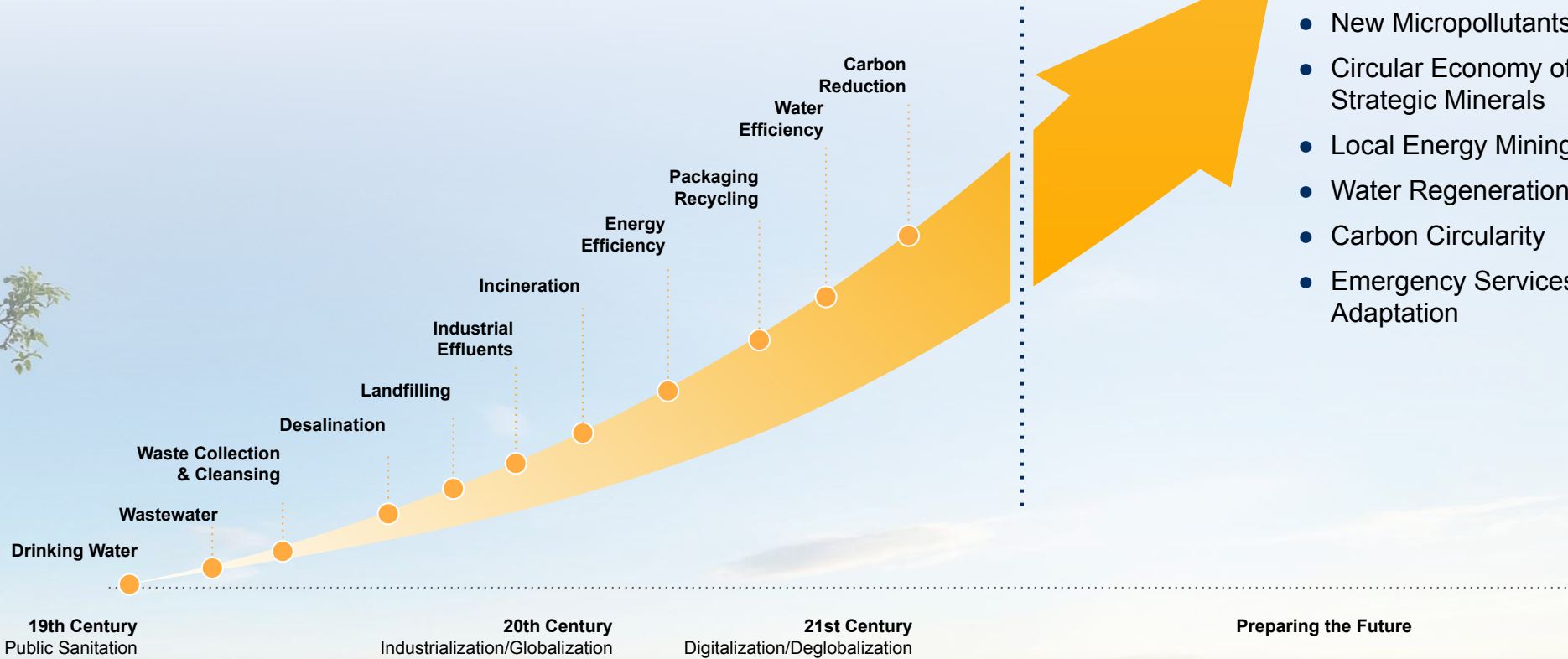
- ✓ Secure Licence to Operate & Critical Resources e.g. AI industries
- ✓ Secure Supply of Strategic Materials
- ✓ Decarbonize and Secure Carbon Supply

### SECURE THE FUTURE OF ESSENTIAL SERVICES FOR CITIES

- ✓ Resilience & Crisis Management
- ✓ Health Protection
- ✓ Efficiency & Affordability, incl. Digital & AI illustrations

# Veolia, Anticipating Tomorrow's Needs... for the Past 170 Years!

## Pioneer in Anticipating Environmental Security Needs

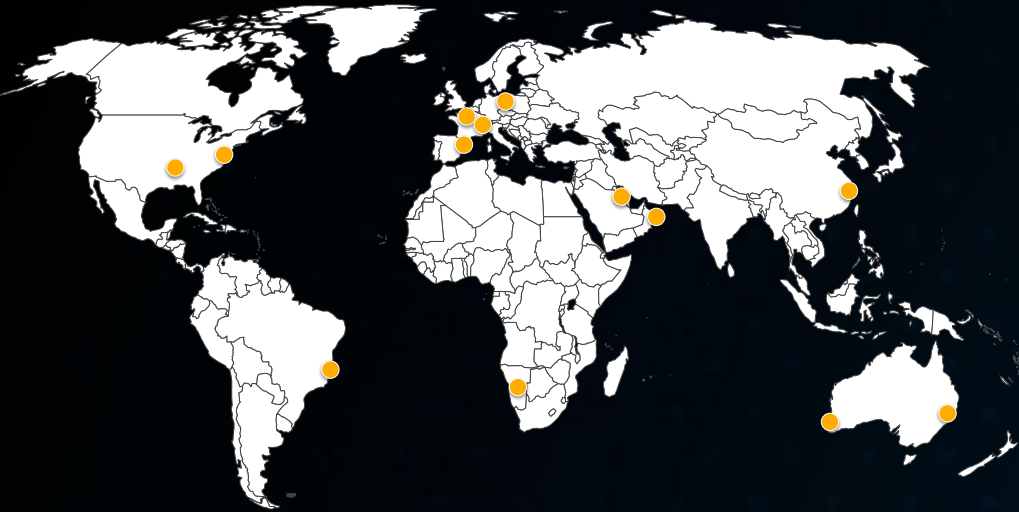


## New Frontiers

- New Micropollutants
- Circular Economy of Strategic Minerals
- Local Energy Mining
- Water Regeneration
- Carbon Circularity
- Emergency Services & Adaptation



# A Powerhouse for World-first Innovations



## AMERICAS



**1<sup>st</sup> full scale ZeeLung™ membranes, an intensification technology of wastewater treatment**  
Yorkville, U.S.



**1<sup>st</sup> high temp. incineration destruction of up to 99.9999% of PFAS**  
Port Arthur, U.S.



**World's 1<sup>st</sup> Ecofactory: Farfana wastewater treatment plant**  
Santiago, Chile

## EUROPE



**1<sup>st</sup> hydrometallurgical battery recycling plant**  
Metz, France



**+150 innovations incl. 10 world 1<sup>st</sup> in a large drinking water contract, incl. low pressure reverse osmosis**  
Paris region, France



**1<sup>st</sup> urban cold recovery network from an LNG terminal**  
Barcelona, Spain



**1<sup>st</sup> climate-neutral project of local energy sourced cross-border heating network in Europe**  
Görlitz, Germany | Zgorzelec, Poland

## NEAR & ME, AFRICA



**1<sup>st</sup> direct potable reuse from wastewater**  
Windhoek, Namibia



**1<sup>st</sup> cutting-edge desalination plant 100% powered by renewable energy**  
Sur, Oman



**1<sup>st</sup> cutting-edge oil&gas reuse complex effluents recycling plant**  
Jubail, Saudi Arabia

## ASIA PACIFIC



**1<sup>st</sup> material recycling facility combining world's most advanced sorting and recycling technologies including robotics**  
Canberra, Australia



**1<sup>st</sup> reuse process water recycling plant for lithium mining**  
Greenbushes, Australia



**1<sup>st</sup> largest PPP<sup>(1)</sup> in China's water including best-in-class AI & Robotics**  
Pudong, China

<sup>(1)</sup> Public Private Partnership

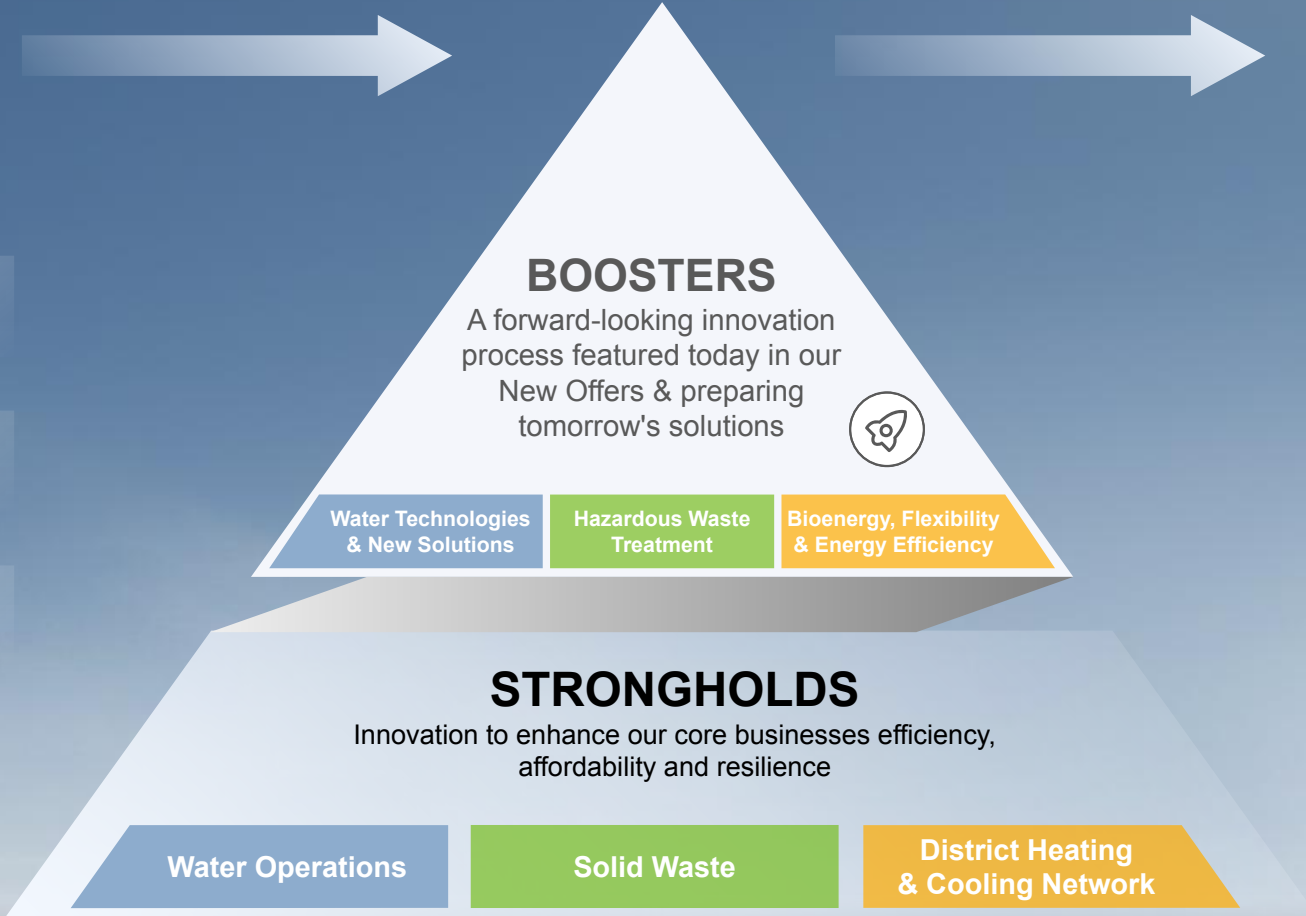
# Enabling Environmental Security Through Innovation

## Innovation Streams

Essential Services & Resilience

Health & Quality of Life

Secure Supply of Critical Resources



Innovate to drive  
**Growth & Efficiency**  
for the next  
**5 - 10 Years**

# Veolia's Winning Formula in Innovation

Enhanced by €1bn Dedicated to Innovation During GreenUp to Prepare Sustainable Growth

Proprietary Solutions



Worldwide Footprint  
& Economies of Scale



Local Delivery  
& Adaptive Solutions



Business Combination

- ✓ **4,600+ patents portfolio**  
and 1st European firm for new patents registration in water technologies

- ✓ **26 Research and Innovation Laboratories on 5 continents**  
+1 new mid 2026, dedicated to chip manufacturing in Singapore



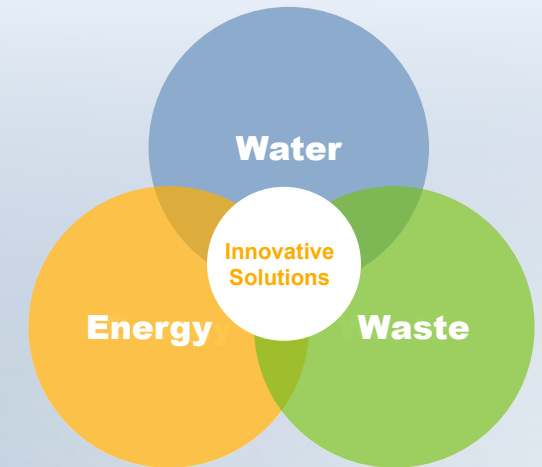
- ✓ **Acceleration with €1bn dedicated to innovation during GreenUp**  
(Capex & Opex)



- ✓ **44 countries<sup>(1)</sup> across 5 continents**

- ✓ **9 Innovation Hubs**  
closer to most advanced ecosystems fostering duplication

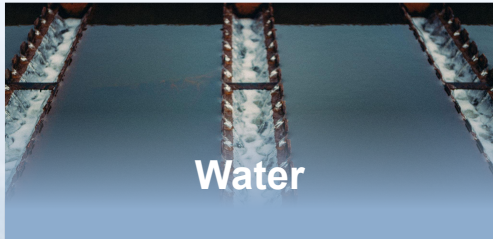
- ✓ **Solutions adapted to local needs**
- ✓ **Innovation ecosystems**  
Partnerships with start-ups, best ranked universities, etc



<sup>(1)</sup> Countries with Capital Employed >€20m

# Wider Long-Term Ambition with Innovation

Capture Untapped Potential Worldwide to Secure Critical Resources



**34bn m<sup>3</sup>**

**of fresh water saved** by applying our digital and AI solutions to networks worldwide<sup>(1)</sup> equivalent to the annual water consumption of 415m inhabitants



**4m tons**

**of critical materials<sup>(2)</sup>** (Lithium, Cobalt, Nickel... ) could be extracted from recycling across Europe, equivalent to 25% of needs



**400 GW**

**of unused local energy reservoir** in Europe, equivalent to the consumption of a country with 50m inhabitants<sup>(3)</sup>



**Avoid 9m deaths** caused annually by soil, water and air pollution worldwide<sup>(4)</sup>



<sup>(1)</sup> Veolia estimates  
<sup>(2)</sup> Veolia estimates for 2030 forecast, sources: EU Critical Raw Materials Act (2024), JRC, ANRT, IFRI, European commission  
<sup>(3)</sup> Veolia estimates for Europe covering the untapped potential for Bioenergy, waste heat and cooling, efficiency gains and expansion in district heating networks, as well as energy efficiency in buildings and industries, equivalent to 30% of imported gas & oil  
<sup>(4)</sup> The Lancet, 2017



# 2030 Ambition for Growth Related to Innovation and Results

By 2030

**€1bn revenues from PFAs & Other New Pollutants Treatment**

- +25% in 2025
- Soil depollution enhanced in Australia

**NEW**

By 2030

**€1bn in revenue from AI Industries**

- Data Centers & Chip Manufacturing

**NEW**

By 2030

**50% of operational efficiencies driven by AI & digital**

- AI & Digital, essential drivers of operational performance

**NEW**

## 2

# SECURE THE FUTURE OF CRITICAL RESOURCES FOR INDUSTRIES

- Secure Licence to Operate & Critical Resources e.g. AI industries
- Secure Supply of Strategic Materials
- Decarbonize and Secure Carbon Supply

# Industries Challenges



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# Proprietary Solutions to Secure The Future of Critical Resources for Industries

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**SECURE LICENCE TO OPERATE &  
CRITICAL RESOURCES**  
e.g. AI Industries

**SECURE SUPPLY OF STRATEGIC  
MATERIALS**

**DECARBONIZE & SECURE CARBON  
SUPPLY**



# Data Centers & Chip Manufacturing

## Facing Acceptability Limits & Pressure on Critical Resources

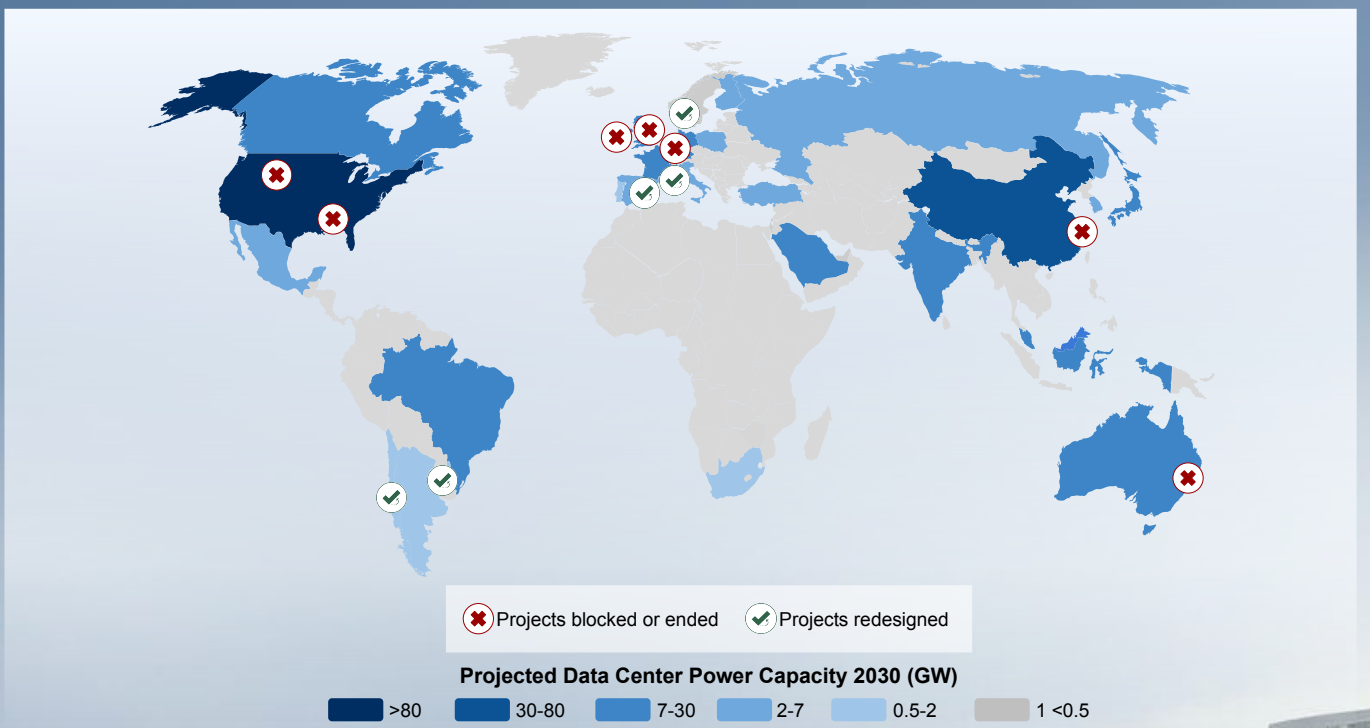
### GROWTH CONTEXT

- Data Centers:**
  - 26% growth in 2026
  - 1.5% of annual global electricity production<sup>(1)</sup>, x2 by 2030
  - Water use expected at **1.2 Trillion liters/y** by 2030<sup>(2)</sup>, x2 vs 2024
- Chip Manufacturing:**
  - 20% annual growth
  - **Water:** 10-25l per chip, 20-40MI per day per Fab<sup>(3)</sup>

### CLIENT NEEDS

- ✓ Fast access to grid
- ✓ Local energy & uninterrupted power supply
- ✓ Steady water supply for cooling systems
- ✓ Continuity of supply of ultra-pure quality water
- ✓ Large supply of high quality solvents & acids

### 2025 DATA CENTER PROJECTS UNDER PRESSURE



<sup>(1)</sup> Deloitte, 2026  
<sup>(2)</sup> IEA 2025, eq. to 415 TWh/ 560 bn liters consumed in 2024, 2030 projection is equivalent to the water consumption of 4+ m inhabitants per year  
<sup>(3)</sup> Robeco Global 2026, large Fab = 35 to 50k wafers/ month  
<sup>(4)</sup> Estimate based on Precedence Research 2026/ Fortune Business Insights



# Veolia's Innovative Solutions Supporting the AI Industry Boom

## Proprietary Technologies & Bridging with Local Communities



### VEOLIA BUSINESSES COMBINATION

#### Water Technologies

#### Energy

#### Water Operations

#### Hazardous Waste

Heat Recovery & Microgrids



Water Replenishment



Ultrapure Water



Electro-deionization



Chemistry for cooling



PFAS Remediation



High-Purity Acid Regeneration



Strategic Metals from WEEE<sup>(2)</sup>



Strategic Metals from Brines



Wastewater Treatment & reuse



Effluents Reclaim & ZLD<sup>(1)</sup>



Hazardous Waste Treatment



<sup>(1)</sup> ZLD = Zero Liquid Discharge  
<sup>(2)</sup> WEEE = Waste from Electrical and Electronic Equipment



# Data Centers Competition for Critical Resources

## Acceptability Challenge with Local Communities

### Los Angeles Times

Lawmakers push a bill to impose an AI data center moratorium



**The Washington Post**  
A movement to ban data centers gains steam across the U.S.



Concern UK's AI ambitions could lead to water shortages



REPORTERS

Spain: data centres and climate crisis



Residents in Havering oppose proposal for 'Europe's largest data centre'

## Emerging Trends of Stricter Environmental Regulations

- Requirements of heat recovery
- Requirements of water reuse or water replenishment
- Limits on energy taken from the grid
- Limits on water consumption



# Launching Today our New Offer: DATA CENTER Resource 360

## Securing Acceptability & Critical Resources for Sustainable Data Centers

**NEW**

### DATA CENTER Resource 360

*Scale with Certainty. Community Connected.*

**High direct impact:**

- **+20%** energy reuse efficiency: Towards a carbon neutrality
- **-75%** water footprint
- **+ 95%** waste recycling and reuse: Lower Environmental Footprint

**All-in-one offering to address critical environmental and operational challenges to:**

- Accelerate delivery
- Secure local acceptance
- Protect performance



**Veolia, a trusted partner:**

- **Trusted by the market**  
Partnership with 10 leading data center players (100+ facilities worldwide).
- **Deep local integration**  
Secure the **licence to build and operate** with strong relationships with **local communities, municipalities** and public authorities.
- **Global scale, locally anchored**  
Combine international credibility with on-the-ground territorial know-how, giving clients both strategic confidence and delivery capability.



# Chip Manufacturing

## Acceptability Challenge with Local Communities

### Chemical Regeneration



- Spent solvents regeneration (**11 units + 2 new in 2026** in Taiwan & Ireland)
- Spent acids regeneration (3 in U.S.)
- NEW** → **SAR Tech acility:** electronic-grade sulfuric acid recovery (Taiwan)
- NEW**

Circularity for **>50% chemicals** consumed

### Ultrapure Water



- **1st Chip Manufacturing Innovation Center** (Singapore), lab/ UPW cleanroom/ collaborative innovation space, opening in 2027
- NEW**
- Electrodeionization **E-Cell ME-5** Pico™ stack delivering <1ppt ions for UPW
- NEW**

2-3nm node chips high-purity standards

### Activated Carbon Regeneration



- **Activated Carbon** to treat chip manufacturing contaminated effluents
- #1 solution for **onsite closed-loop activated carbon** regeneration in chip manufacturing fabs (Taiwan)
- NEW**

Reduced reliance on **imported media**

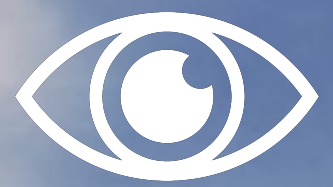
### Water Reuse



- **Membrane Technologies** for water circularity
- **ZeeWeed™ Membrane** for efficient wastewater treatment while enabling reuse.
- NEW**

40% of Fabs exposed to high water stress





## Focus on SAR Tech\*

Disruptive Innovation with E-grade Sulfuric Acid Regeneration



### Sustainable Value Chain for Electronic-grade Sulfuric Acid

Pioneer regeneration technology in Taiwan of spent sulfuric acid followed by purification to produce a fresh E-grade sulfuric acid leading to:

→ **Reduced costs:**

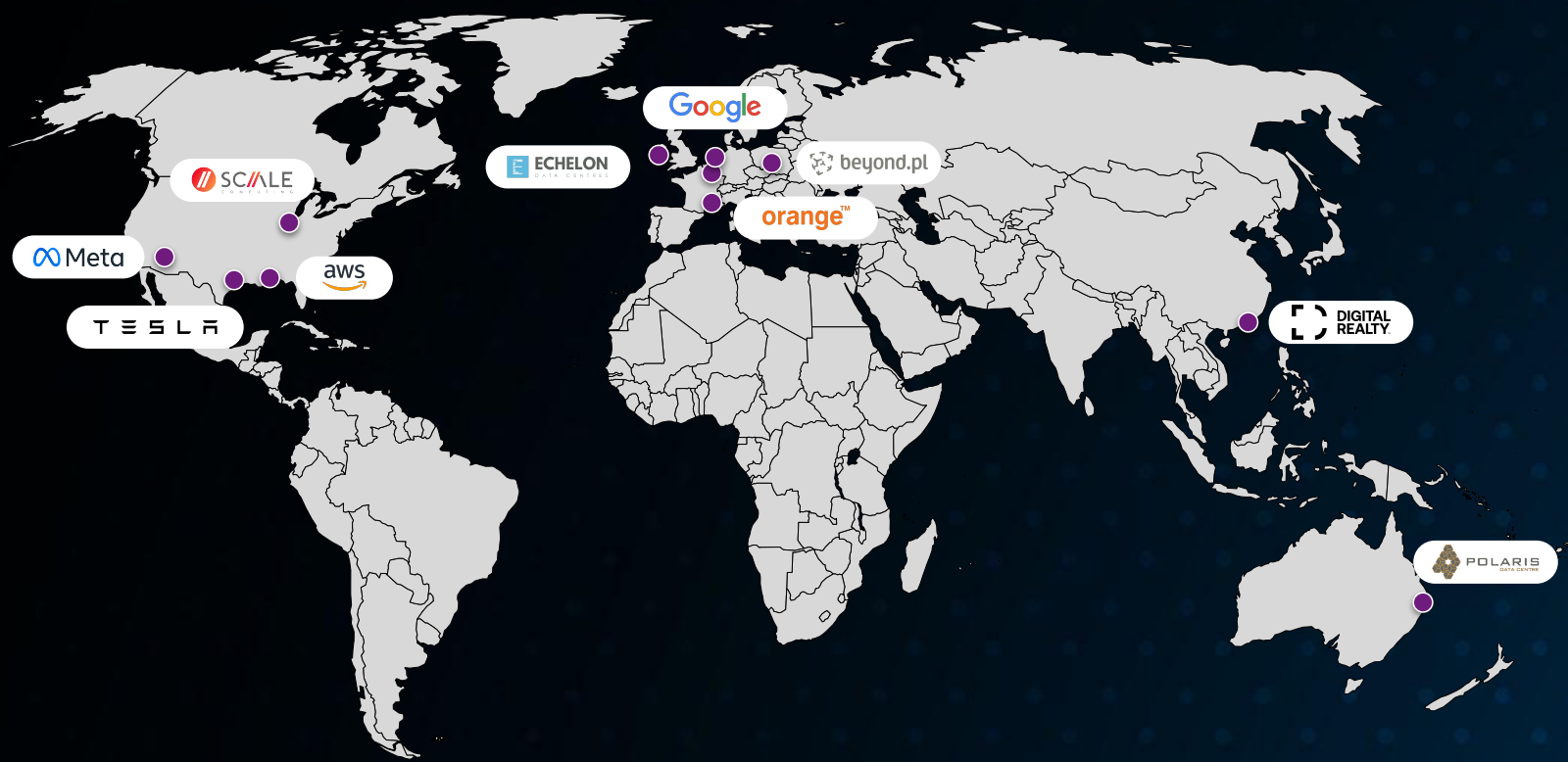
Potential to save **40 to 70%** cost on top of virgin acid purchasing by avoiding hazardous waste treatment

→ **Reduced carbon footprint:**

Potential to save **50%+** carbon emissions compared to virgin sulfuric acid usage and spent acid disposal and treatment



# Data Centers: Focus on our Recent Wins & New Partnerships



**Microsoft**

**Memorandum of Understanding**  
Focus on AI applications and Energy and waste solutions

**NEW**

**aws**

**Strategic Framework Agreement**  
Focus on water and waste AI developments

**NEW**

**Google**

**Letter of Intention**  
Multiple heat recovery projects in Europe

**NEW**

**SDC | CAPITAL PARTNERS**

**Project Development Agreement**  
Energy centre with modular design up to 300MW (UK)

**NEW**

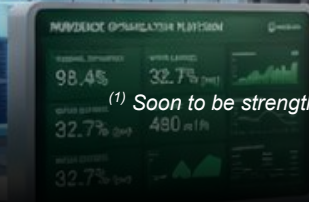
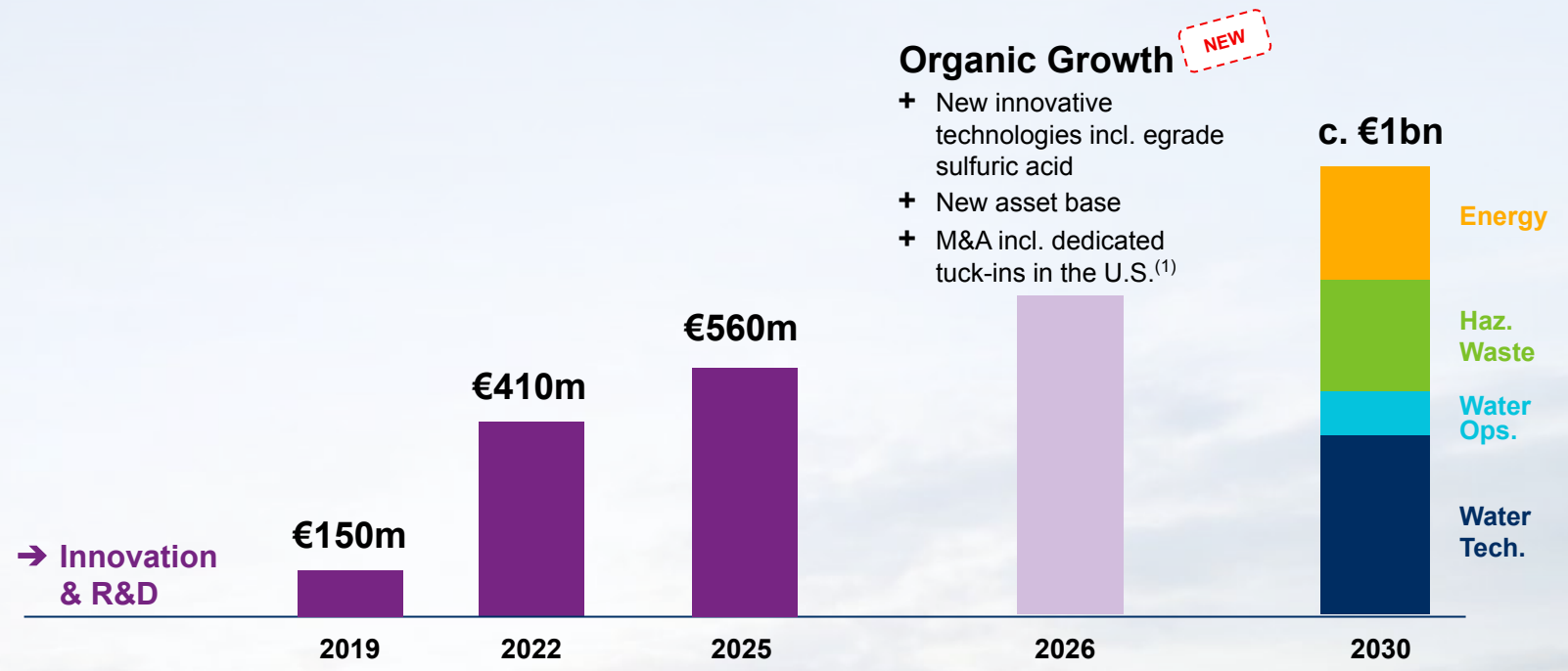
# Ambitious Revenue Growth with AI Industries



# DELIVER PROFITABLE GROWTH SUPPORTING AI INDUSTRIES

Through Anticipation, Proprietary Solutions & Scaling-up

## AI INDUSTRIES REVENUES: DATA CENTER RESOURCE 360 AND CHIP MANUFACTURING



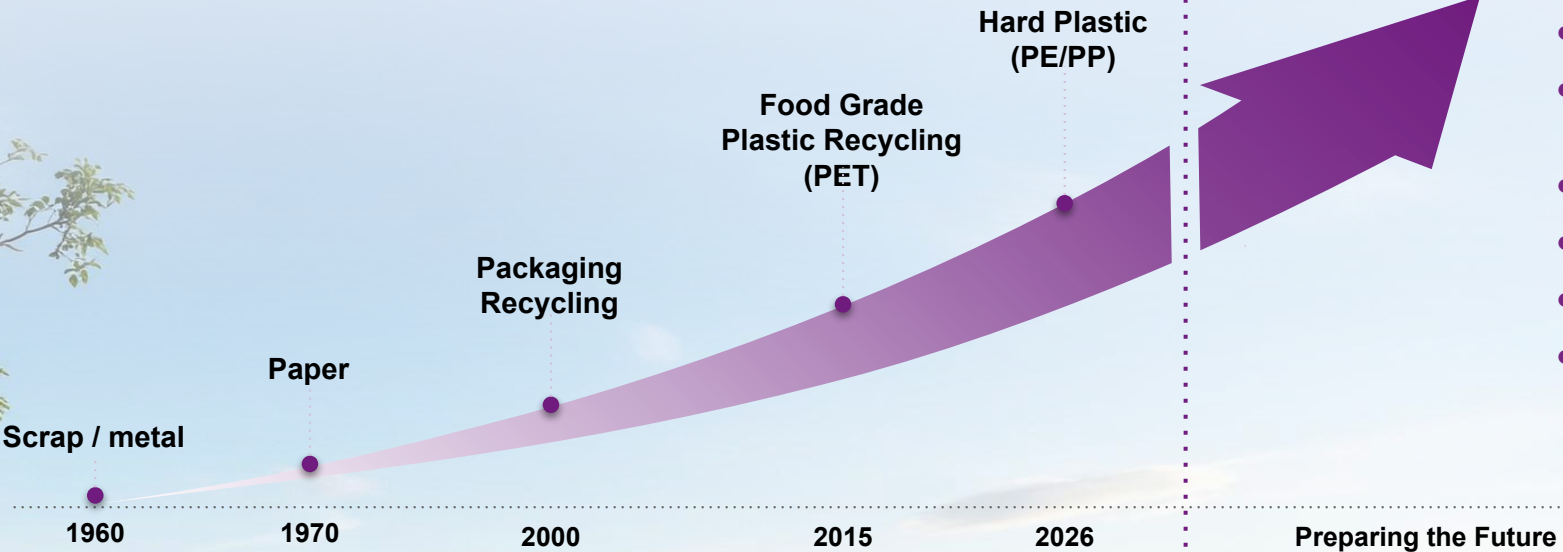
<sup>(1)</sup> Soon to be strengthened with presence in 50 states with Clean Earth (Subject to the completion of the transaction, expected by mid-2026)

# Circular Economy at the Service of Sovereignty & Strategic Independence



# Innovating to Secure Supply of Strategic Materials via Recycling & Circular Economy

## Pioneer in Anticipating Environmental Security Needs



## New Frontiers

- Soiled plastics, pots, trays
- Strategic Materials (Li, Co, Ni...)
- Batteries
- Photovoltaic Panels
- Wind Turbines
- Electronic Waste



# Veolia's Innovation in Plastic Recycling

## Including 26 Plants Across the Globe

### CHALLENGES

- Global plastic production increasing by **4%/y**, reaching **430 mt** in 2024
- Priority is:  
Reduce > Reuse > Recycle
- Mechanical recycling:  
**75% reduction** in CO<sub>2</sub> emissions
- Dependence on oil supply & price

### OUR SOLUTIONS

#### CIRCPACK



- **Eco-design services** for packaging, providing **recyclability assessments**: lab & operational
- **Intelligence platform** for European countries regulations, compliance & green claims
- Recycling courses for packaging industries

#### PlastiLoop

**NEW**



- **Worldwide Veolia platform**: a network of multiple factories in Europe, Asia and Latin America
- **Circular, reliable, traceable** recycled plastic
- Food-grade applications
- **Tailor made "recipe"** to dedicated usage

#### PET FOODGRADE®



- 5 years R&D program from 2005 to 2010
- Development of **comprehensive solutions** from color sorting to flakes or pellets decontamination
- **8 plants** in Europe and Asia **EFSA**<sup>(1)</sup> and/or **FDA**<sup>(2)</sup> approved

#### PET TRAYS

**NEW**



- A **closed-loop** tray-to-tray & bottles PET facility in UK recycling facility for food-grade packaging
- Operational in 2026, **80 kt/y** capacity
- Meeting the upcoming legislation: UK's Simpler Recycling

<sup>(1)</sup> EFSA: European Food Safety Authority  
<sup>(2)</sup> FDA: U.S. Food and Drug Administration



# VEOLIA'S INNOVATION

to Secure Local Supply of Critical Minerals & Enhance Strategic Autonomy

## CRITICAL MINERALS, KEY FOR STRATEGIC INDUSTRIES

- 19 critical minerals are key for industries
- Global demand is booming by 2030<sup>(1)</sup>:
  - Lithium: +150%
  - Cobalt: +75%
  - Nickel: + 50%
  - Copper: +20%

## MINING & REFINING VERY CONCENTRATED

- Production / mining concentrated in very few countries
  - ~70% Lithium: China, Australia, Chile
  - ~80% Cobalt: Congo, Indonesia, Russia
  - ~80% Nickel: Indonesia, Philippines, Russia
  - ~50% Copper: Chile, Congo, Peru
- Refining concentrated in China: ~70% share
- Europe is highly dependent on imports

~25% needs can come from circular solutions & local sources via circular economy<sup>(3)</sup>

<sup>(1)</sup> Source: International Energy Agency (IEA)

<sup>(2)</sup> REE = Rare Earth Elements, group of 17 specialty metals used in various high-tech applications

<sup>(3)</sup> Veolia estimates for 2030 forecast, sources: EU Critical Raw Materials Act (2024), JRC, ANRT, IFRI, European commission



# Circular Economy to Secure Local Supply of Critical Minerals

## Battery Recycling<sup>®</sup> and Mineral Extraction



- Licensed network for battery collection and secured black mass extraction (EU, U.S.)
- Hydrometallurgy unit with proprietary<sup>®</sup> technologies to extract technical-grade metal hydroxides & carbonates (nickel, cobalt, lithium, copper) from black mass (e.g. France)

Annual Capacity **~20,000 t** of batteries, when full scale development is achieved

## Strategic Metals Separation from Municipal Waste<sup>®</sup>



- Licensed network for municipal waste preparation and minerals separation
- Non-ferrous extraction and refining unit for aluminium and copper  
  
e.g. Belgium **0.3 t** of CO<sub>2</sub>e savings per ton of Incinerator Bottom Ash treated

## Brines Refining<sup>®</sup> for Strategic Metal Salts in Process Effluents



- Patented molecular separation solutions:
  - on-exchange / adsorbent resins
  - Combined membrane / electro-separation solutions<sup>®</sup> (bipolar electro dialysis)
- Thermal concentration<sup>®</sup>: evapo-crystallization and membranes to yield battery-grade lithium hydroxide from spodumene or lithium brines
- Units delivered in Japan, Australia, etc.

# CO<sub>2</sub> Reduction: Secure Local Sources of Decarbonized Energy

## Energy From Wastewater Heat THERMOWATT™



- **Cost-effective** patented technology recovering thermal energy from wastewater sewage unleashing untapped energy potential
- Delivering heating or cooling services for buildings
- Saving **70%** on fossil energy

## Biogas Purification for Grid Injection MEMGAS™



- **Proprietary solution** for biogas purification and compression from landfill or wastewater treatment plant for grid injection  
e.g. Southeast Wastewater Treatment Plant in San Francisco,  
68 GWh/year injected into the Pacific Gas & Electric network

400 GW of unused local energy potential in Europe,  
equivalent to the consumption of a country with 50m inhabitants <sup>(1)</sup>

<sup>(1)</sup> Veolia estimates for Europe covering the untapped potential for Bioenergy, waste heat and cooling, efficiency gains and expansion in district heating networks, as well as energy efficiency in buildings and industries, equivalent to 30% of imported gas & oil

# Innovate to Recycle CO<sub>2</sub>: Carbon Capture and Usage

## Combining Water Technologies and Waste Incineration



**NEW**

→ Amine-based solution to remove CO<sub>2</sub> from flue gas and **proprietary electro dialysis** to reclaim amine solvents

- Local direct use in substitution to fossil CO<sub>2</sub>
- **3,000 t/y CO<sub>2</sub> production and sale already secured**

e.g. Industrial-scale amine carbon capture demonstrator at Le Mans Métropole energy from waste to energy plant

**NEW**

→ **Membrane Technology** for CO<sub>2</sub> separation at a hazardous waste **High Temperature Incineration Plant** in the U.S.

## New Frontiers

- **E-Methanol**  
e.g. Supplying sustainable e-fuel from biomass for ships to the largest port in the world, Shanghai, China
- **Sustainable Aviation Fuel**  
e.g. Innovative wastewater treatment technology
- **Bio-Methanol**  
e.g. Industrial scale unit under construction in Äänekoski, Finland
- **Carbon Sequestration in Soils or Rocks**  
e.g. Pilot in the UK

**3**

## SECURE THE FUTURE OF ESSENTIAL SERVICES FOR CITIES

- Resilience & Crisis Management
- Health Protection
- Efficiency & Affordability incl. Digital & AI Illustrations



# Essential Services Challenges



# Proprietary Solutions to Secure Essential Services for Cities

**RESILIENCE & CRISIS MANAGEMENT**

**HEALTH PROTECTION**

**EFFICIENCY & AFFORDABILITY incl.  
Digital & AI illustrations**



# Proprietary Solutions to Secure a Safe Water Supply

## ✓ High Quality Drinking Water

Delivering pure drinking water safe from pollutants, including “new” micropollutants

## ✓ Water Reuse

Across all applications: Irrigation, industrial and potable with 2,000+ references

## ✓ Sustainable Desalination

Energy consumption divided by 5 (now <3 kwh/m<sup>3</sup>) leading to affordability (<\$0.5/m<sup>3</sup>)

### BIOLOGICAL TREATMENT



**ZeeLung™** Membrane Aerated Biofilm Reactor

- Low energy
- Small footprint



**Cella™** sustainable biofilm technology

- Biobased material
- Reduced chemicals

### MICROPOLLUTANTS REMOVAL



**Actiflo®** Carb clarification + activated carbon media  
**Opacarb™** FL activated carbon fluidized bed reactor

- Up to 99% micropollutants removal



**Ozonia®**, disinfection, advanced oxydation

- UV
- Ozone

### PRESSURIZED ULTRAFILTRATION



**ZeeWeed™** ultrafiltration pressurized membranes

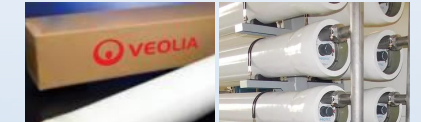
- Resistant, easy to clean
- Low operational and lifecycle costs



**ZeeWeed™ 1500 Rackless Module System**

- Easy to install
- Compact & expandable

### NANOFILTRATION & REVERSE OSMOSIS



**Veolia Membrane Series**

- Nanofiltration
- Reverse Osmosis

**Sirion™** high purity water treatment

- >95% dissolved salts
- 99% suspended solids, bacteria & organics

**Hubgrade™** cloud-based Smart Membranes

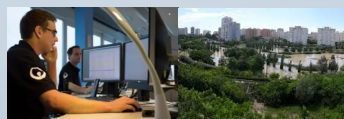
- Process expertise + AI
- Real-time monitoring and predictive maintenance

# INNOVATIVE SOLUTIONS FOR RESILIENT CITIES & CRISIS MANAGEMENT

## PREVENTIVE SOLUTIONS

**Smart Water Integrated Management™:** water network live monitoring (incl. digital twin) to anticipate, minimize and ensure service continuity even during extreme weather conditions  
*e.g. Prague, Czech Rep., Denmark*

**Nature Based** solutions for adaptation: Artificial wetlands (China), floodable urban park (Valencia, Spain)



## BUSINESS CONTINUITY

**Water Treatment Mobile Units, Fleet of ~2,000 units (U.S. EMEA...):** Pre-packaged, easily transported and quickly setup water treatment solutions for both municipal & industrial needs



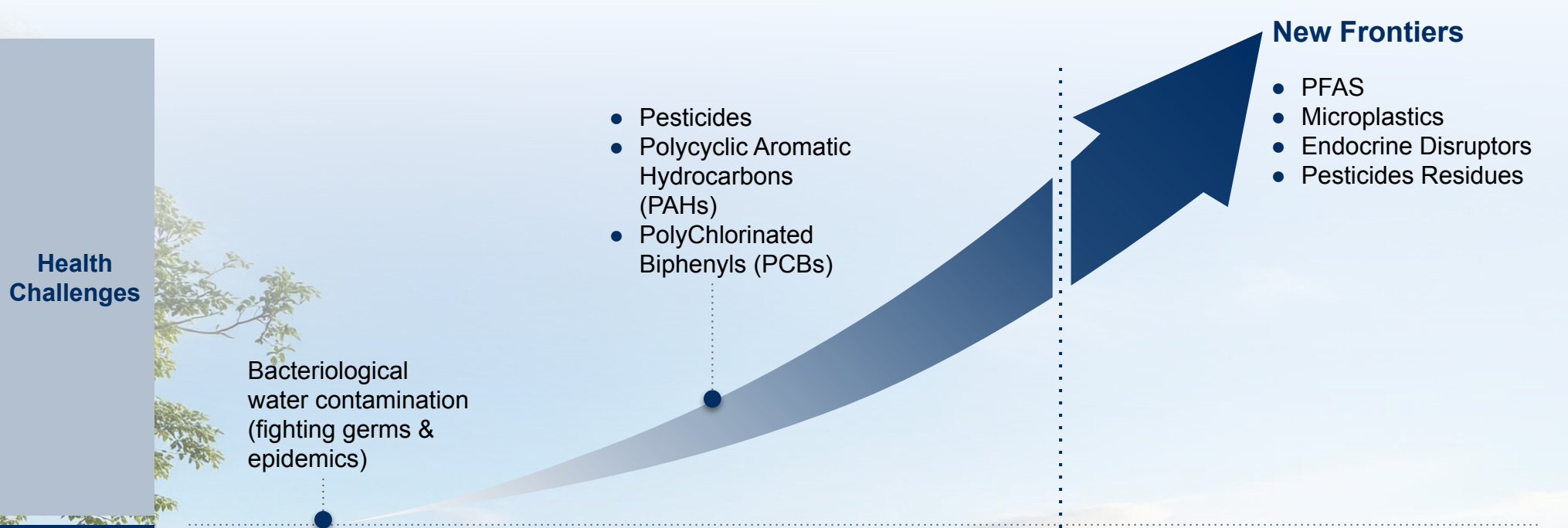
## EMERGENCY DECONTAMINATION

**Dexter™ Haptic AI Enhanced Robotic System**  
Remotely controlled arm to remove fuel debris from the highly radioactive and contaminated environment:  
*e.g. Fukushima, Japan*

**Mobile Laboratory** tailor-made to evaluate treatment of micropollutants directly at the water resource intake  
*e.g. Saint Louis, France*



# Health Protection: Constantly anticipating to be Solution Ready



Health Challenges

Veolia's Solutions

Bacteriological water contamination (fighting germs & epidemics)

- Pesticides
- Polycyclic Aromatic Hydrocarbons (PAHs)
- PolyChlorinated Biphenyls (PCBs)

### New Frontiers

- PFAS
- Microplastics
- Endocrine Disruptors
- Pesticides Residues

→ 97% of citizens prioritize **health protection** against **pollution for water, waste, energy services**, ahead of the final price <sup>(1)</sup>

**Early 20th**  
Disinfection (Ozone, Chlorine and UV)

**Mid to late 20th**  
Adsorption Removal (Activated Carbon and Resins)  
Membrane Filtration

**Early 21st**  
**BeyondPFAS**

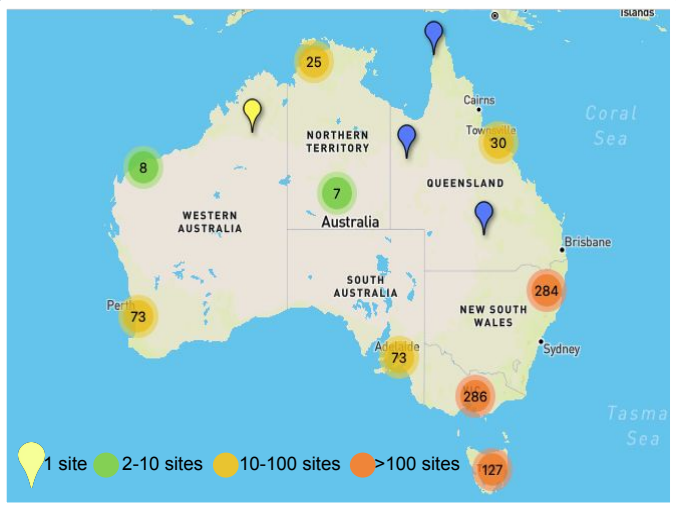
<sup>(1)</sup>Elabe Barometer on Ecological Transformation, 2024 36



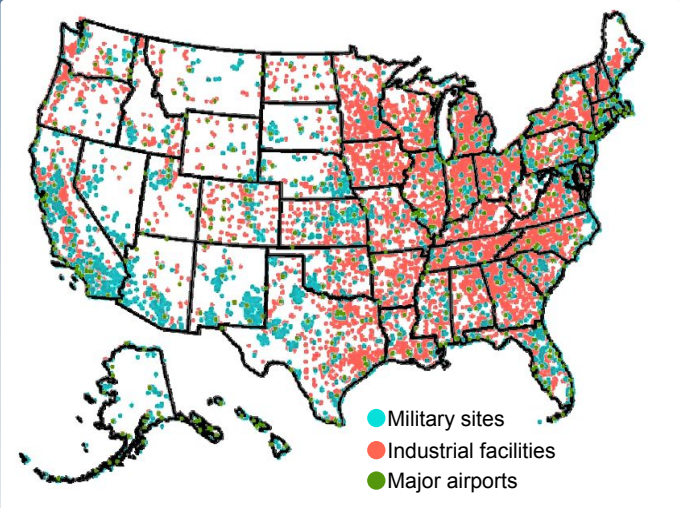
# ENVIRONMENTAL POLLUTION: A MAJOR HEALTH ISSUE

9m Deaths/y Caused by Air, Soil & Water Pollution<sup>(1)</sup>

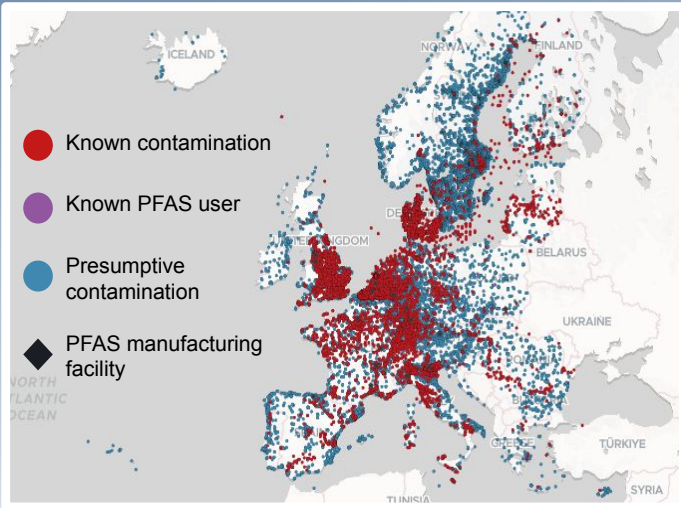
PFAS Pollution in Australia<sup>(2)</sup>



Presumptive PFAS Polluted Sites in the U.S.<sup>(3)</sup>



PFAS Pollution in Europe<sup>(4)</sup>



(1) The Lancet 2017  
(2) <https://pfas.australianmap.net/>  
(3) ACS Publications - 2022  
(4) Forever Pollution Project, 02/2023



# BeyondPFAS, A Unique End-To-End Offer

## BeyondPFAS

### ANALYSIS & TREATABILITY STUDY

#### LAB TESTS



On all mediums



Mobile labs

### DESIGN & ENGINEERING

#### SEPARATION



#### Water

- LEAPfas™ granular activated carbon and ion exchange
- PROflex and SIRION™ reverse osmosis
- PFAS Treatment Mobile Units: Able to treat 1.1 MLD<sup>(1)</sup> of water



#### Soil

- Soil Remediation
- Secondary Treatment
- Physico-Chemical Treatment

### OPERATION

### FINAL TREATMENT

#### DISPOSAL



#### Water treatment residues

- Sludge treatment
- Reactivation of activated carbon

#### Hazardous Waste

- High temperature incineration, up to 99.9999% (validated by Dayton University, OH)
- Drop® chemical add-on solution for combustion
- Stabilization & Landfilling

### CONTINUE TO INNOVATE

- **Analysis:** Scale-up on-site analysers
- **Separation:** Extract all molecules, including ultra-short chains  
*e.g. MoU with the University of California, Berkeley to capture the toughest pollutants (TFA)*
- Test new methods as Ultra foam fractionation



<sup>(1)</sup> Million litres per day 38



# DELIVER PROFITABLE GROWTH WITH BEYONDPFAS

Through to Anticipation, Proprietary Solutions & Scaling-up

“BeyondPFAS & New Pollutants” Revenues



<sup>(1)</sup> PFAS and new pollutants  
<sup>(2)</sup> Subject to the completion of the transaction, expected by mid-2026



# ANTICIPATING EMERGING MICROPOLLUTANTS

## CHALLENGE: EMERGING POLLUTANTS & REGULATIONS



**Pesticides, Fungicides, Herbicides & their metabolites**



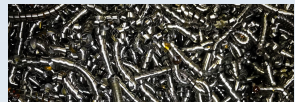
**Organic contaminants for domestic uses**



**Pharmaceutical and cosmetic products**



**PFAS Per- and polyfluoroalkyl substances including ultra short chain (TFA)**



**Heavy metals lead, cadmium**



**Nanomaterials**



**Microplastics**



**Pathogens and antibiotic resistance**

## VEOLIA'S INNOVATIONS



**DETECTION**



**MONITORING**



**TREATMENT SOLUTIONS**

- Veolia's **"chemical fingerprint" approach**: detect over **4,000 contaminants** in water samples at ultra-trace levels (incl. **endocrine disruptors**) e.g. *labs in France*

- **Advanced** approaches to detect **unlimited number of known and unknown molecules**

- Test **fast or on line monitoring** (ongoing collaborations with startups) e.g. *Graphene PFAS ID Card* e.g. *online AI assisted microplastics analysis*

- **Develop standard methods** for microplastics monitoring e.g. *EU Bluewater Project*

- Test and identify **microplastic pollution sources** at water basin scale and confirm wastewater treatment efficiency e.g. *99% microplastics elimination in wastewater (Toulon Metropole, Aalborg University & LEESU Laboratory)*



# LEVERAGING DIGITAL, AI & ROBOTICS

To Secure **Efficiency, Competitiveness & Affordability** for Essential Services



## DIGITAL & AI TO ENHANCE

Employees

Operations

Customer Service

**23%**  
of total operational efficiency  
from **digital & AI** in **2025**  
  
From **10%** in **2023**  
  
Across  
**Strongholds & Boosters**

- Enhanced productivity
- Enhanced plant availability
- Reduced SG&A
- Reduced customer pain points
- Better offers
- Better quality
- Optimized Price

→ **Target: Scale up to 50% of operational efficiencies driven by AI & digital by 2030**



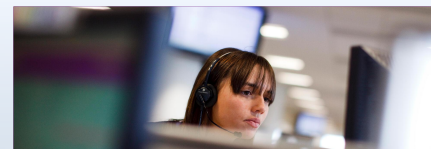
# ENHANCE EMPLOYEES WITH DIGITAL & AI

## VEOLIA SECURE GPT



- **SecureGPT** launched in **Oct 2023**
- **1st Generative AI platform** on CAC 40
- **90,000** active users daily

## SPECIALIZED AGENTS



- **2,000+** specialized agents created
- Working to **optimize internal process** reporting and data analysis
- Current Scale up / duplication across BUs

## TRAINING

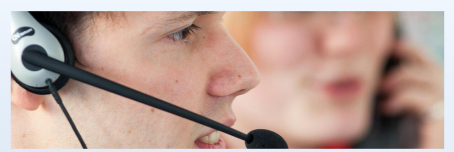


- **37k+ employees** trained at the end-2025
- **100% employees** trained by 2027



# ENHANCED CUSTOMER SERVICES WITH DIGITAL & AI

## CALL CENTERS



- **Unified AI platform for call centers**  
*e.g: 50 contracts leading to x10 automated transactions and 70 NPS score for call center agents, 24/7 availability (Spain)*
- **Current duplication to other BUs**

## BOOSTED OFFERS



- Acceleration of the tender response process via an **AI conversational agent**  
*e.g: >90% improved performance for request for proposal analysis (Middle East)*
- Direct online pricing & order for Commercial & Industrial waste collection (UK)

## ENHANCED PRICING



- **Optimized pricing strategies** for transaction-based services  
*e.g: Analyzing historical and actual data with AI to provide tailor-made pricing (France)*



# Enhanced Operations with Digital & AI

## AI FOR COOLING WATER CHEMISTRY

- Adapting service intervals via **Real-time AI** and **machine learning**
- **40%** Extension of service intervals and **-3%** of energy and chemicals consumption

*e.g. Arizona, United States*

## AI-POWERED SUBSTATIONS

- **Increasing** heating district energy efficiency
- **94%** efficiency, **600k** customers, avoiding 60 Kt/y CO2

*e.g. Harbin, China*

## MEMBRANE MAINTENANCE OPTIMIZATION

- AI & machine learning system to **analyze real-time SCADA data** for critical desalination assets
- Maximize productivity (**10-30%**), reduce energy (**2-10%**)

*e.g. Sur desalination plant Sharqiyah, Oman*

## AI-POWERED LEAK DETECTION

- **Hubgrade™**: Network analysis and leak identification boosted by AI
- **2.5%** increased network performance per year

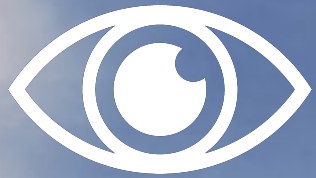
*e.g. Redal, Morocco*

## ROBOTICS

- **AI robotic arm** for sorting recyclable plastic
- **2-3 times faster** than traditional methods

*e.g. Southwark facility, UK*





# FOCUS ON NEW TALK TO MY PLANT



## Revolutionize efficiency of our plants with generative AI by leveraging various sources of complex data into helpful, everyday conversation

- Data gathered from **live SCADA, digital twins, historical worldwide benchmark**
- **Improved operational efficiency & service continuity**, quicker problem solving
- **Target: 30% of our maintenance employees** using the conversational agent in 2027 and all our major operations by **2030**
- Underlying AI model chosen to ensure **positive environmental footprint**



# 4

## Roundtable: Innovation & AI Industry

### **Will HEWES**

Global Lead for Water Sustainability,  
Amazon Web Services

### **Richard KIRKMAN**

CEO, Northern Europe Zone and Chief Growth Officer, Veolia

### **Stuart STOCK**

Head of Digital Business and Technology, Veolia

### **Glenn VICEVIC**

Chief Technology Officer, Water Technologies, Veolia



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WRAP UP

# Strong Ambition to Accelerate Innovation for Environmental Security

## VEOLIA, WINNING FORMULA

- ✓ **Proprietary Solutions:**  
available, affordable, reliable
- ✓ **Worldwide Footprint  
& Economies of Scale**
- ✓ **Local Delivery & Adaptive  
Solutions**
- ✓ **Business Combination**



## PROPRIETARY SOLUTIONS FOR CRITICAL NEEDS

To Secure **the Future of  
Critical Resources for  
Industries**

&

To secure **the Future of  
Essential Services for  
Cities**



## A STRONG AMBITION

### GreenUp 24-27

€1bn dedicated to innovation<sup>(1)</sup>

### By 2030

- ✓ **€1bn in revenue** for data centers and chip manufacturing industries **NEW**
- ✓ **€1bn in revenue** in PFAS & new pollutants treatment
- ✓ **50% of our operational efficiencies** driven by AI & digital **NEW**

<sup>(1)</sup> €200m Investments + 4 years €200m Opex 48



## IMPORTANT DISCLAIMER

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