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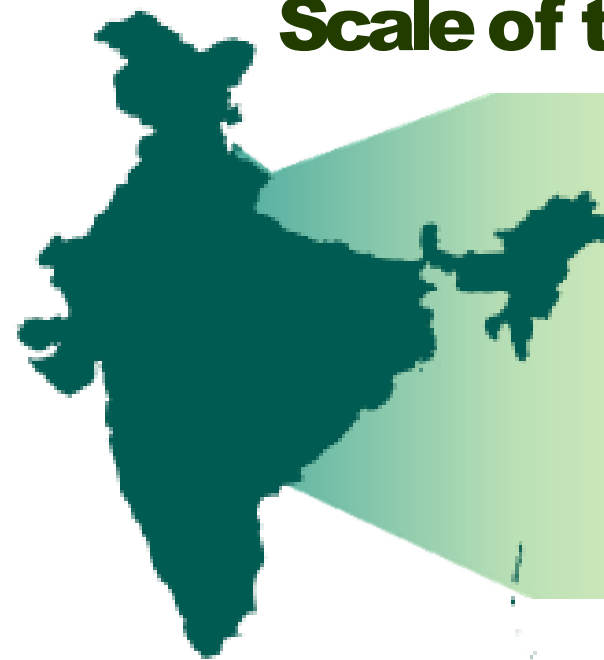
Awarded for
Circular Business
Model(Evolved)



India's E-Waste Crisis: A Lost Resource, A Growing Risk

Problem? Opportunity - E-waste is India's fastest-growing waste stream but it remains largely untapped as a resource

Scale of the Opportunity



📊 **6.19 MMT of e-waste generated in 2024 - India is the 3rd largest e-waste producer in the world**

🚀 **Projected to reach 14 MMT by 2030**

⚠️ **Majority processed by the informal sector**

Consequences

- 🌍 **Environmental damage: toxic leakage (lead, mercury, cadmium)**
- 👤💰 **Public health risks from unsafe handling**
- 🌐 **Import dependence for critical minerals**
- 🔗 **Missed opportunity for circular manufacturing**

What's Being Lost?

💰 **High-value materials: Gold, Silver, Copper, Lithium, Rare Earths**

❌ **Lost economic value due to inefficient recovery**

🏆 **Lost opportunity to catapult India as a leader in sustainable manufacturing**



India is sitting on a critical mineral goldmine —but losing it to informal, inefficient systems

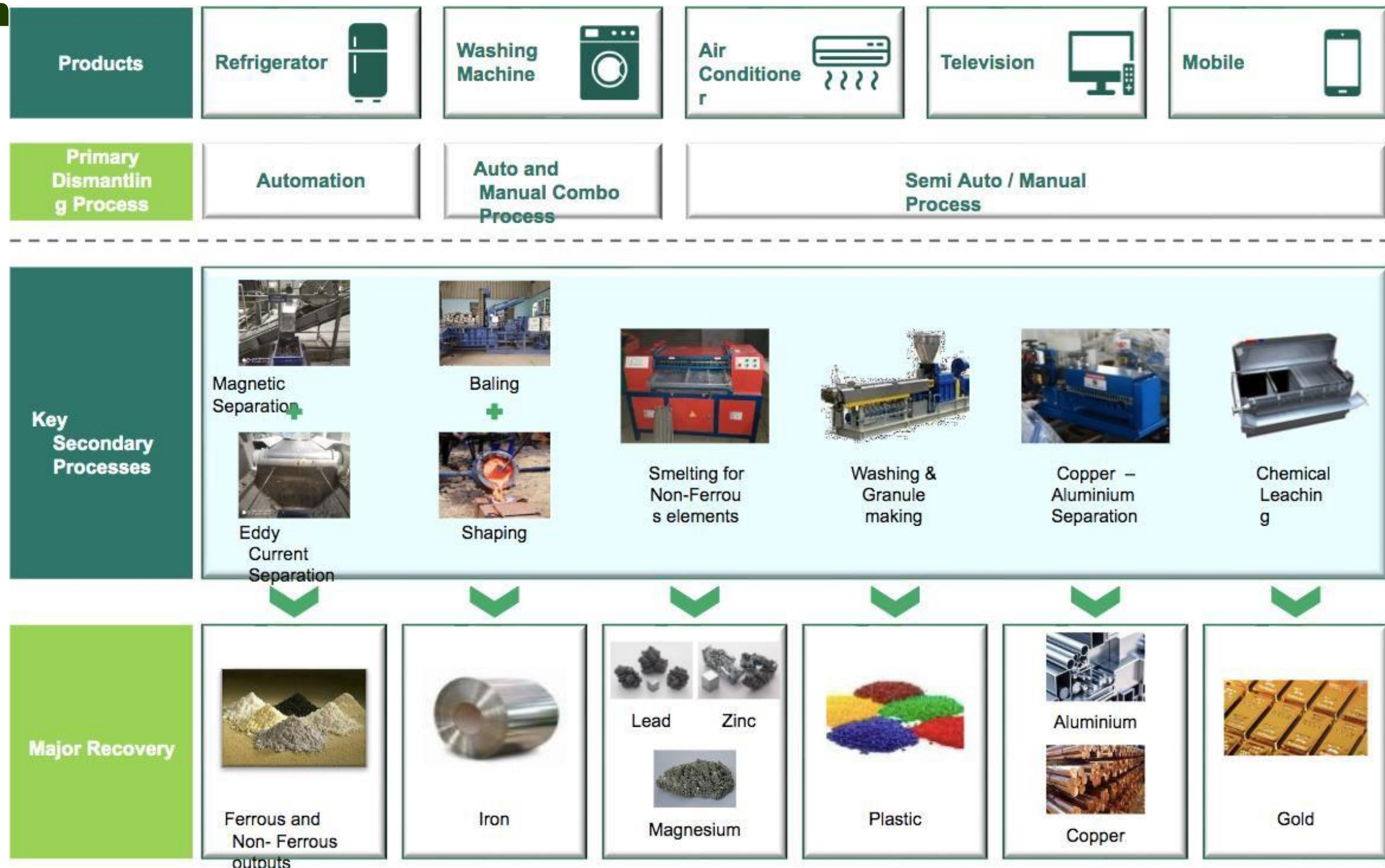
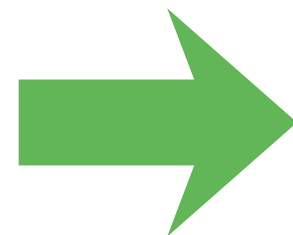




Greenscape's Solution: Turning E-Waste into a Strategic Resource

Turning Circularity into India's Global Manufacturing Advantage - Greenscape is Enabling India's First True Closed-Loop E-Waste Ecosystem

Processes applied on Key E-Waste Inputs








Innovation & USP

IN Only recycler in India producing OEM-grade secondary raw materials



♻️ Enables direct reintegration into manufacturing (true closed loop)

⚙️ Advanced, globally benchmarked technology + in-house R&D

Approach & Methodology

-  **Technology Led Approach: Tackling complex e-waste streams of mixed metals and materials**
-  **Environment-First Mindset: Going beyond compliance to set higher sustainability standards**
-  **Mission-Led Teams: Teams aligned to a shared circular vision**
-  **Nationwide Network: Scalable, cost-efficient reverse logistics**
-  **Customer-Obsessed: Built around OEM needs and outcomes**

Investment & Scale

-  **\$15M+ invested in advanced technology**
-  **₹10 Cr+ in R&D**
-  **65,000 TPA capacity | 200,000+ MT recycled**
-  **Revenue: ₹270+ Crores**
-  **Geographic coverage - Pan India collection network | State of the Art Recycling plant in Alwar with capacity of 65000 TPA**

Stakeholders

-  **OEM Partners: Samsung, LG, Haier, Panasonic, etc.**
-  **Government &**  **Global Platforms: Member of NITI Aayog Working Group, Host for ITU-led international collaborations, Project Partner for Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH**
-  **Industry : REIA (founding member)**
-  **Community & Institutions: Circular cities programs in Shiv Nadar School Noida, awareness drives at The British School New Delhi, American Embassy school, etc.**
-  **Collection Partners - Aggregators, not for profits, etc.**

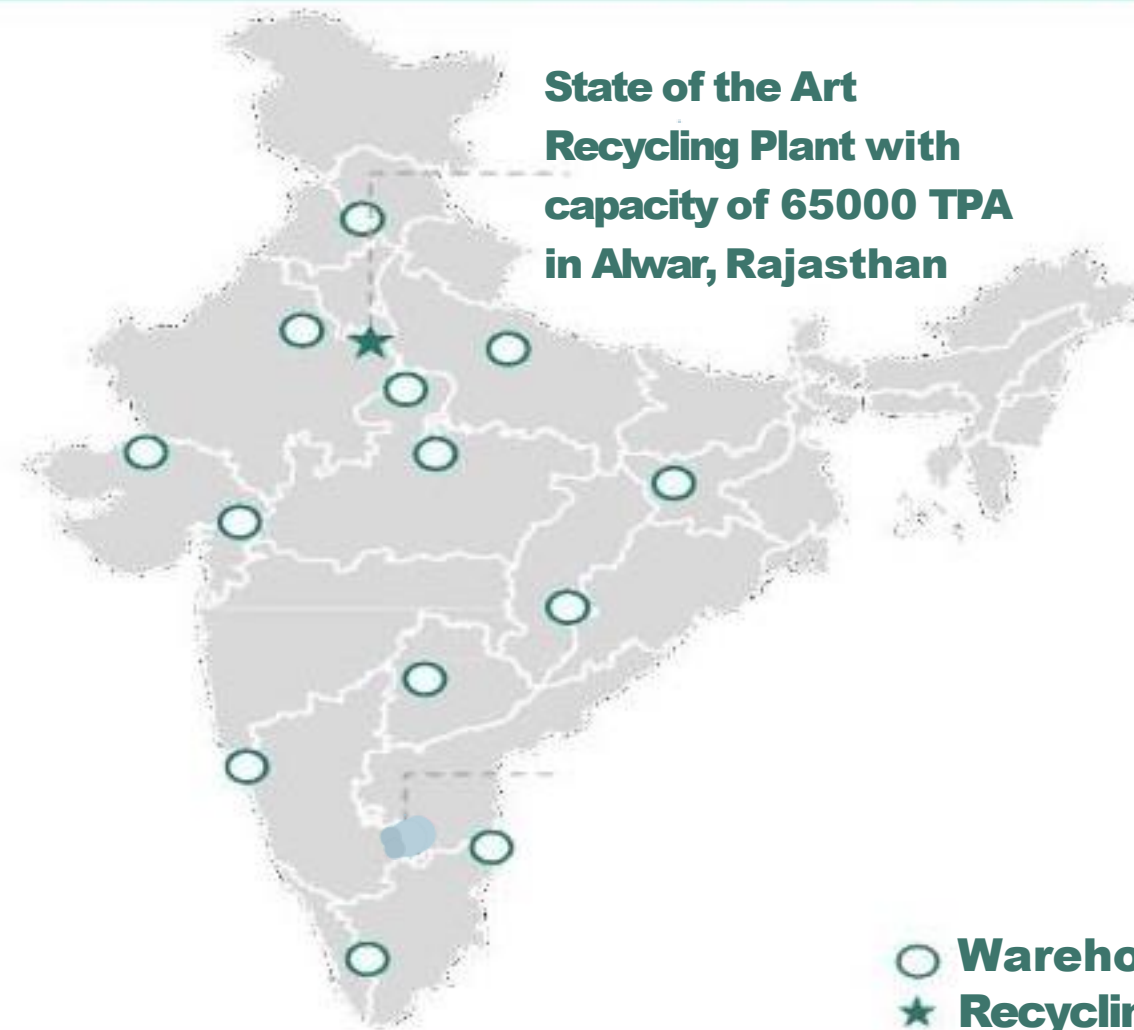


Greenscape transforms E-waste from a liability into a scalable, high-value input for India's circular economy





State of the Art Facilities





Integrated and efficient manufacturing infrastructure delivering complete bouquet of services beyond dismantling





Distinguished player in the space backed by unique manufacturing capabilities


 Great combination of manual, semi automatic and automatic best suited for Indian environment


 CPCB authorised e-waste recycler with multiple certification

 Most Efficient Reverse Logistic Network across the country – **Dedicated Logistic Team & 4PL Expertise**

 Only recycler producing high-grade secondary raw materials catering to OEMs

 PAN India presence with 5 owned and 400+ partnered warehouses

 Only e-waste recycler with **high-tech R&D facility** and a separate polymer recycling unit

Alwar Factory Overview

- Fully insured facility
- Total surface: 60,656 m²
- 13,530 m² covered area
- Highly secured facility monitored by round the clock CCTV access
- Zero chemical and hazardous waste discharge unit, best in class pollution management system



Accomplishments

Driving System-Level Change with Measurable Impact

Responsible Leadership

Policy Leadership: NITI Aayog Working Group member;
Founding member of Recycling & Environmental Industry Association of India (REIA) to facilitate dialogue between recyclers, policymakers, and industry leaders

Global Recognition: Selected as model plant for ITU international study tour, Project Partner for Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Awareness & Outreach: Leading initiatives like My Circular City with schools and NGOs



Dr. Ashok Kumar (Director, Greenscape) at the 2025 Conclave on Waste Recycling & Climate Change organised by REIA where Shri Bhupender Yadav, Hon'ble Union Minister for Environment, Forest & Climate Change was the Chief Guest



NITI Aayog January 2026 Report with Greenscape's contribution as Member of the Working Group on Circular Economy for E-waste and Lithium-Ion Batteries recognised



ITU Study Tour at Greenscape Plant



Accomplishments

Measurable Impact

- 200,000+ MT E-waste recycled**
- 65,000 TPA capacity (India's largest)**
- ₹270+ Crore revenue from circular model**
- Up to 90% lower carbon footprint vs virgin material production**
- 200+ jobs created, including 70+ women**

Economic Benefits

- 500+Cr Value Recovered:** High-value recycled materials generated in the last 3 years
- 95% Lower Energy Use:** Compared to production from virgin ores
- 34.3% ROCE:** Strong returns driven by a circular, capital-efficient model

Environmental & National Impact

- Reduced dependence on virgin mining & imports**
 - Supports EV, renewable & electronics manufacturing ecosystems**
 - Prevents toxic leakage (lead, mercury, cadmium)**
- IN Strengthens India's critical mineral security**



Greenscape is not just recycling e-waste — it is building India's circular resource economy



People & Planet - Impact that matters most

Current Scenario of E-Waste Treatment In India





- ❑ ~ 90% of E-Waste market in India is unorganized
- ❑ ~Collection, handling, recovery and all other processes are mostly carried out using unscientific methods leading to pollution
- ❑ ~76% of workers engaged in the occupation are experiencing respiratory diseases and several other body ailments
- ❑ Informal Economy: Child labour, no formal employment contracts

95% collection ✖ 50% Dismantling ✖ 25% end recovery=
12% (Total Value Recovered)

Greenscape's E-Waste treatment approach



- ✓ Pioneer organised E-Waste recycling player 
- ✓ Zero discharge of hazardous chemical substances at any of the properties 
- ✓ Global standards in Environment and Health & Safety management
- ✓ Gainful employment opportunity to 250+ employees




95% collection ✖ 90% Dismantling ✖ 95% end recovery
81% (Total Value Recovered)





Way Forward - Scaling Impact, Strengthening Leadership

From Proven Model to Nationwide Circular

Scalability of Solution

-  **Scale-ready model with 65,000 TPA capacity & expansion roadmap**
-  **Replicable closed-loop systems across geographies & product categories**
-  **Expanding into critical minerals & advanced material recovery**

Leadership Commitment

-  **Strong Board & senior leadership backing for long-term investments**
-  **Continued focus on technology, R&D & capacity expansion**
-  **Alignment with Net Zero, SDGs & India's circular economy vision**

Stakeholder Engagement

-  **Deepening OEM partnerships for closed-loop mfg**
-  **Ongoing policy collaboration (NITI Aayog, industry bodies)**
-  **Expanding global partnerships & knowledge exchange**
-  **Scaling community awareness & collection ecosystems**



Greenscape is poised to scale circularity from a solution to a national movement

Thank You

