

September 30, 2025 – Origin Materials, Inc. (Nasdaq: ORGN)

Investor Q&A Fireside Chat

Topics and Timestamps

Participants

John Bissell, CEO and Co-Founder

Evan Winchester, Director of Marketing Communications

- 0:30** Introduction
- 1:20** Industry Adoption of Sustainable PET Caps
- 3:20** Customer Demand: Still Water Applications, Carbonated Soft Drink (“CSD”) Applications
- 4:40** Customer Announcements, CSD Customer Qualification Timeline
- 6:10** Customer Qualification: “When” Not “If”, Qualification Details
- 8:05** Cookie Dough vs. Cookies, Communication of R&D Results
- 10:50** In-House Testing vs. External Testing During Cap Qualification
- 16:50** Live Capping Demonstration, 2025 drinktec Conference
- 17:50** Origin First-to-Market Advantage, Caps Now on Store Shelves in California
- 19:35** Cap and Technology Platform Advantages vs. Alternatives
- 22:35** On Track for Six CapFormer Lines to Complete Factory Acceptance Testing by End of Year
- 23:35** Potential CapFormer Deployment if Capital Unconstrained
- 25:55** Concluding Remarks