



Circular Economy
Platform Hungary



bcsh

Magyarországi Üzleti Tanács a Fenntartható Fejlődésért
Business Council for Sustainable Development in Hungary



BUSINESS IN CIRCULATION

Second report about
the circular economy in Hungary

2023

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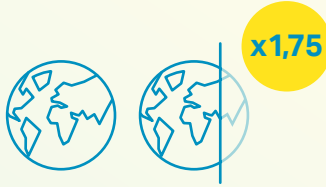
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Each year, we use 1.75 times as many resources as Earth can replace to sustain our lifestyles, and the supply of ecosystem goods and services cannot keep up with our needs.

(National Footprint and Biocapacity Accounts 2022 Edition, data.footprintnetwork.org, UNEP)



Seventy-five percent of Earth's land surface has been significantly altered by human activity, including 85 percent of wetlands.

(IPBES)



Our global food system is the primary driver of biodiversity loss, and 24,000 out of 28,000 species are at risk of extinction due to agriculture alone.

(Chatham House és UNEP)



Twenty-five percent of global greenhouse gas emissions are the result of land clearing, crop cultivation, and fertilization.

INTERNATIONAL OUTLOOK AND DOMESTIC SITUATION CONCERNING THE CIRCULAR ECONOMY

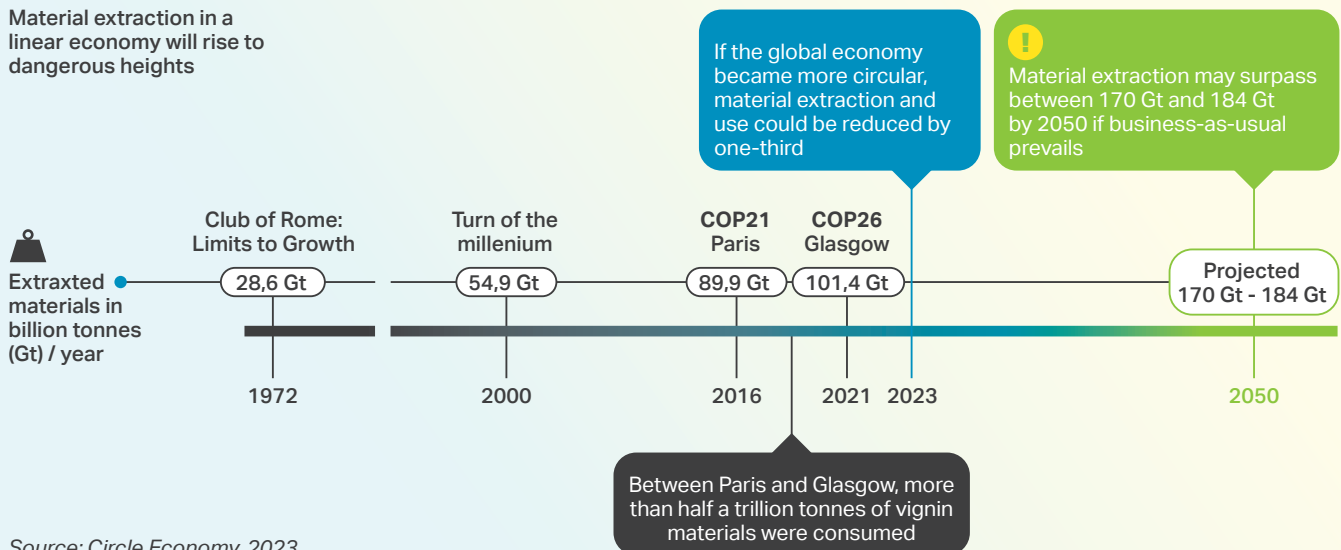
Global social needs could be met with 70% of the amount of material that is currently used

The negative impact of humans on nature is becoming more and more apparent. In addition to the climate emergency, we now clearly must count on having a nature emergency as well. The degradation of nature has far-reaching consequences. Damaged ecosystems exacerbate climate change, undermine food security, and put people and communities at risk. In this situation, **accelerating the transition to a circular economy is in our common interest; immediate action is also needed in this area.**

The circular economy represents a 4.5 trillion dollar business opportunity (Accenture, 2015) and is now an irreversible global trend. Between the climate conference in Paris in 2015 and the climate conference in Glasgow in 2021, the world economy used more than five hundred billion tons of freshly mined raw materials. This quantity could be used to build the Great Wall of China nearly 9,500 times. Meanwhile, the **index of global material use is deteriorating**. While in 2018, 9.1% of all raw materials used in the world economy came from recycled materials, this number had dropped to 8.6% by 2020, and by 2023 the indicator will only be 7.2%. And as business as usual continues, the amount of material used on a global basis may increase by up to 84% by 2050 (Circle Economy, 2023).

Forecast of global material use by 2050

Material extraction in a linear economy will rise to dangerous heights



Source: Circle Economy, 2023

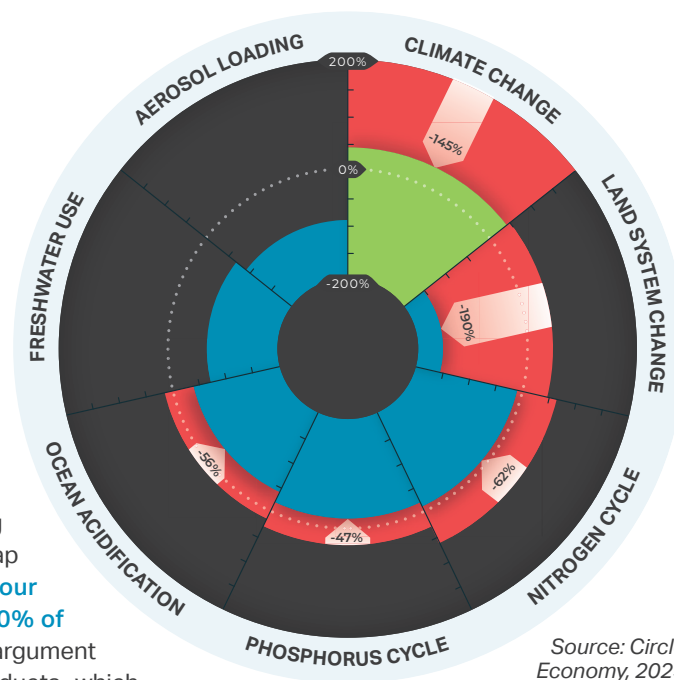
The drop in consumption can have a positive effect on several tipping points

The implementation of the circular economy offers a way out of this self-destructive process. The main findings of the latest Circularity Gap Report (CGR), published in 2023, show that **global social needs could be met with 70% of the material that is currently used**. Reducing consumption to this extent would significantly positively impact several ecological tipping points.

Humanity could greatly reduce ocean acidification, the excessive use of nitrogen and phosphorus, land use, and the rate of global warming. The environmental impact of human activity could be kept within the carrying capacity of global ecosystems in the first four mentioned categories, and an **increase in the average temperature of the earth's climate by more than two degrees Celsius – compared to the pre-industrial period – could be prevented**.

The overlap between the need to promote a circular economy and the fight for climate protection has been a popular research topic in recent years. Research by the Ellen MacArthur Foundation from 2021 showed that **45% of global greenhouse gas (GHG) emissions come from land use and industrial production systems**. According to the latter's claims, in the fight against climate change, we can only affect half of all emissions by modernizing energy systems and using renewables. The other half of GHG emissions can be reduced by reforming our consumption habits (EMF, 2021). The Circularity Gap Report of the same year went even further, claiming that **our production-consumption systems are responsible for 70% of GHG emissions globally**. An important element of their argument concerns the size of the carbon footprint included in products, which is built into them through the amount of energy used during their production, distribution, use, and disposal. This is the main argument, in addition to the fact that it is **not enough to simply utilize waste as a secondary raw material during the circular transformation**. This logic would still lead to production-based economic growth, the maintenance of which would entail significant demand for materials and energy in the future (Circle Economy, 2021). (Circle Economy, 2021).

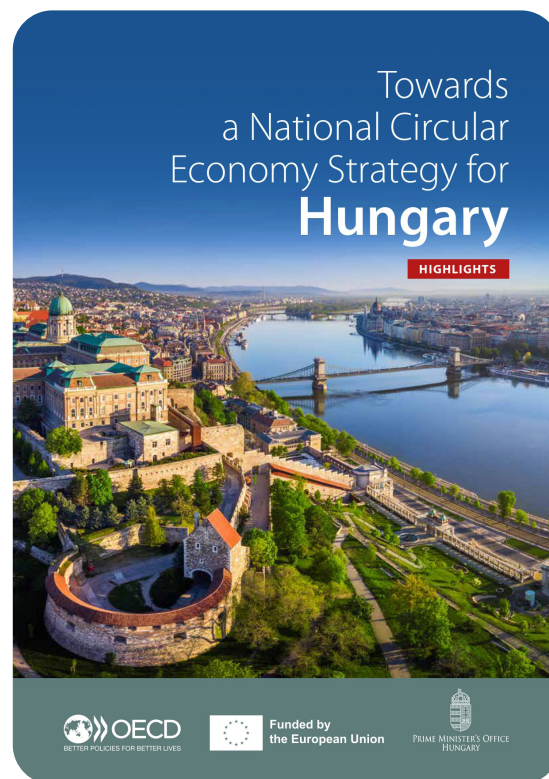
The impact on the tipping points of ecological systems of the transition to a circular economy



The OECD's recommendation for a hungarian circular strategy was prepared

In Hungary, regarding natural resources, **although resource productivity (GDP/total material use) has improved somewhat** (the strongly negative trends of 2013-2018 have stopped), **it is still significantly below the average of the other V4 countries (Czech Republic, Poland, Slovakia) and the EU average** according to the latest progress report of the National Council for Sustainable Development published in 2021. There was no change in the proportion of biologically inactive areas in the last two years (2019-2020) and no significant positive difference in the amount of greenhouse gas emissions; thus, **we can say that the economic growth experienced in Hungary in the last decade – which destroys the quantity and quality of natural resources to an extent far exceeding the EU average – is not sustainable**. Resource productivity has improved since the previous report; however, more natural resources than the EU average are still needed to achieve a given economic result – a fact explained primarily by the boom in the construction industry and significant public investment.

In accordance with the objectives of the EU, the **issue of the circular economy is increasingly becoming the focus of domestic legislative bodies, so that** we can expect major progress in this area. **The OECD report on Hungary's circular economic transformation has been prepared, which provides a basis for the preparation of Hungary's Circular Economy Strategy.** The report focuses on **three main areas: the biomass and food industry, the construction industry, and plastics**. According to the recommendations of the OECD, Hungary must achieve three main objectives by 2040. The first is the doubling of the country's resource productivity compared to the level of 2019. To this end, the government must invest in areas such as eco-design (sustainable product design), as well as the dissemination of innovation and new business models that enable the sharing and reuse of products. The second objective is to double Hungary's use of recycled materials from the current level of 6.8% to 15%. It is encouraging that, according to the CGR reports of recent years, it would be sufficient to double the performance indicator of the world economy, which is around 7-8%, to fulfill the goals of the Paris climate agreement. The last objective for Hungary is to increase the number of circular jobs by 30% (to 2.5% of the total workforce) in industry, agriculture, and the service sector (*OECD Környezetvédelmi Igazgatóság, 2023*).

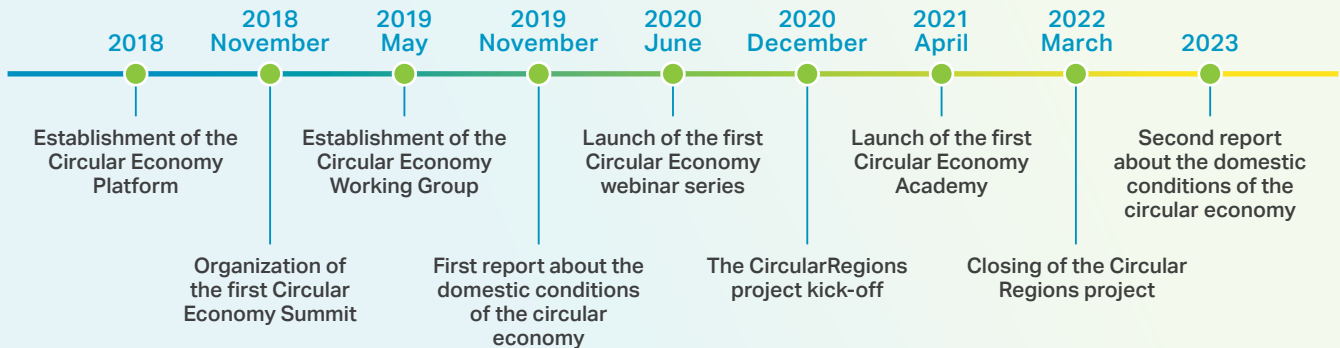


CIRCULAR ECONOMY PLATFORM

The Circular Economy Platform was officially established in Hungary as a shared initiative of the Business Council for Sustainable Development in Hungary (BCSDH), the Embassy of the Kingdom of the Netherlands, and the Ministry of Innovation and Technology in 2018. Ninety-nine companies have already joined the Platform, the aim of which is to accelerate the transition to a circular economy by sharing knowledge, implementing joint projects, and engaging in collaboration.

Why is the Circular Economy Platform important?

- Because most economic operators are not yet fully aware of this model, even though it will increase the resilience of the world economy and facilitate the accomplishment of the targets of the Paris Climate Change Agreement and the United Nations Sustainable Development Goals.
- Because BCSDH and its partners have a crucial role to play in creating a change of mindset and shared thinking, guiding community-minded and action-driven change leaders, and sharing business solutions that bring about real change.
- Additionally, because collaboration and knowledge transfer between corporate, governmental, and scientific communities is needed for a paradigm change in terms of helping the model to gain ground.



YOU CAN READ MORE ABOUT THE CIRCULAR ECONOMY PLATFORM HERE:

www.bcsdh.hu/en → *Our activities* → *Circular Economy Platform*

MEMBERS OF THE CIRCULAR ECONOMY PLATFORM



WHERE ARE WE NOW IN HUNGARY? SURVEY OF THE DOMESTIC CIRCULAR ECONOMY

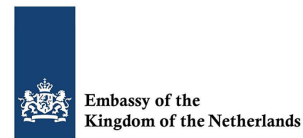
Executive Summary

At the beginning of 2023, the Circular Economy Platform, under the umbrella of the Business Council for Sustainable Development (BCSDH) and with the support of Bay Zoltán Applied Research Ltd. and the Embassy of the Kingdom of the Netherlands, prepared a survey of the domestic potential of the circular economy for the second time. **The purpose of the research was to identify the most important challenges and map the business solutions that have already been implemented.** The results of the questionnaire survey support the original purpose of the Circular Economy Platform: **there is a need for innovation, the presentation of circular economy business solutions, and exploring potential forms of collaboration.**

Compared to the results of the previous research conducted in 2019, we can see an improvement regarding the appearance of the circular concept in the approach to doing business. Companies are paying more attention to integrating circular principles into everyday corporate practice. More and more companies are employing sustainability specialists – in some places, specifically with a focus on circularity – partly due to the sustainability reporting requirements of the European Union (EU). **Despite the positive trends, regarding the large toolbox of circular economy options, the focus of most actors is on recycling and waste management practices.** The application of circular product design guidelines and business models (e.g., modular product design or service-based product distribution), which would move the production focus of the economy towards new, innovative consumption systems, is even less common in domestic practice.

The Circular Economy Platform continues to see its mission as promoting the circular transformation of Hungary by fostering the cooperation of the business, civil and administrative spheres, as well as the sharing of knowledge at the domestic and international levels. A significant milestone in this mission is the survey that is presented in the following chapters.

The survey is not representative; the results reflect the opinions of companies who completed it voluntarily.



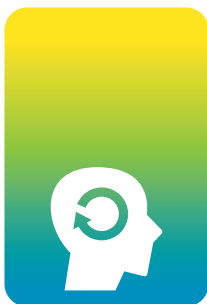
THE PARADIGM SHIFT IS STILL FAR AWAY

In early 2023, within the framework of the Circular Economy Platform led by the BCSDH (Business Council for Sustainable Development Hungary) and Bay Zoltán Applied Research Nonprofit Ltd., with the expert support of the Embassy of the Kingdom of the Netherlands in Hungary, a second survey of the domestic potential of the circular economy was implemented. **The objective of the survey was to identify key challenges and map pre-existing domestic business solutions.**

The survey involved nearly 90 organizations, **95% of which operate in the corporate sector**, with 45% being large companies and 40% small and medium-sized enterprises. The service sector is strongly represented, particularly the construction and real estate industries. (The survey is not representative but reflects the opinions of the responding organizations.) Most respondents are familiar with the principles of the circular economy and claim to apply them in some form.

Among the activities related to the circular economy that exist, the most popular ones are still involve **easily applicable "low-hanging fruit."** **In contrast, more complex circular economy models have spread to a negligible extent.** There have been minor shifts in the top three most often mentioned Circular activities, with **raising consumer awareness and engaging partners preceding selective waste collection.** The implementation of circular thinking in procurement currently mainly involves the **inclusion of local suppliers.** However, the **application of criteria for suppliers, whether related to carbon neutrality or the use of recycled materials, is not common.**

Activities related to the circular economy that exist



Raising environmental awareness among consumers and partners



Separate collection of communal waste



Applying the aspects of the circular economy during the procurement processes

Unfortunately, another trend is that **conventional activities are still prominent** among the plans to be realized by 2030. The participating **companies are not typically including new models, even at the planning stage.** Models such as involvement in the sharing economy or the application of Industry 4.0 appear to require more time, but it is expected that they will play an increasingly significant role in the future.

Green procurement is the most pressing topic

The current measures related to the circular economy primarily focus on **material and energy flows, communication** with consumers, and **internal process regulation**.

Future planned measures are **increasingly expected to be extended to supplier networks, involving growing expectations and stricter requirements**. The issue of green procurement is the most urgent one concerning which companies are **planning the most activities and where there is the most significant lag**. Other urgent topics include creating **business partnerships** and increasing **renewable energy utilization**.

Future planned activities related to the circular economy

Tightening the environmental recommendations for suppliers



Developing business partnerships for the circular economy (B2B)



Increase the amount of energy covered by renewable energy sources



Control of operating processes



Informing the consumer properly, raising environmental awareness



Reduce the amount of energy used during the operation and production



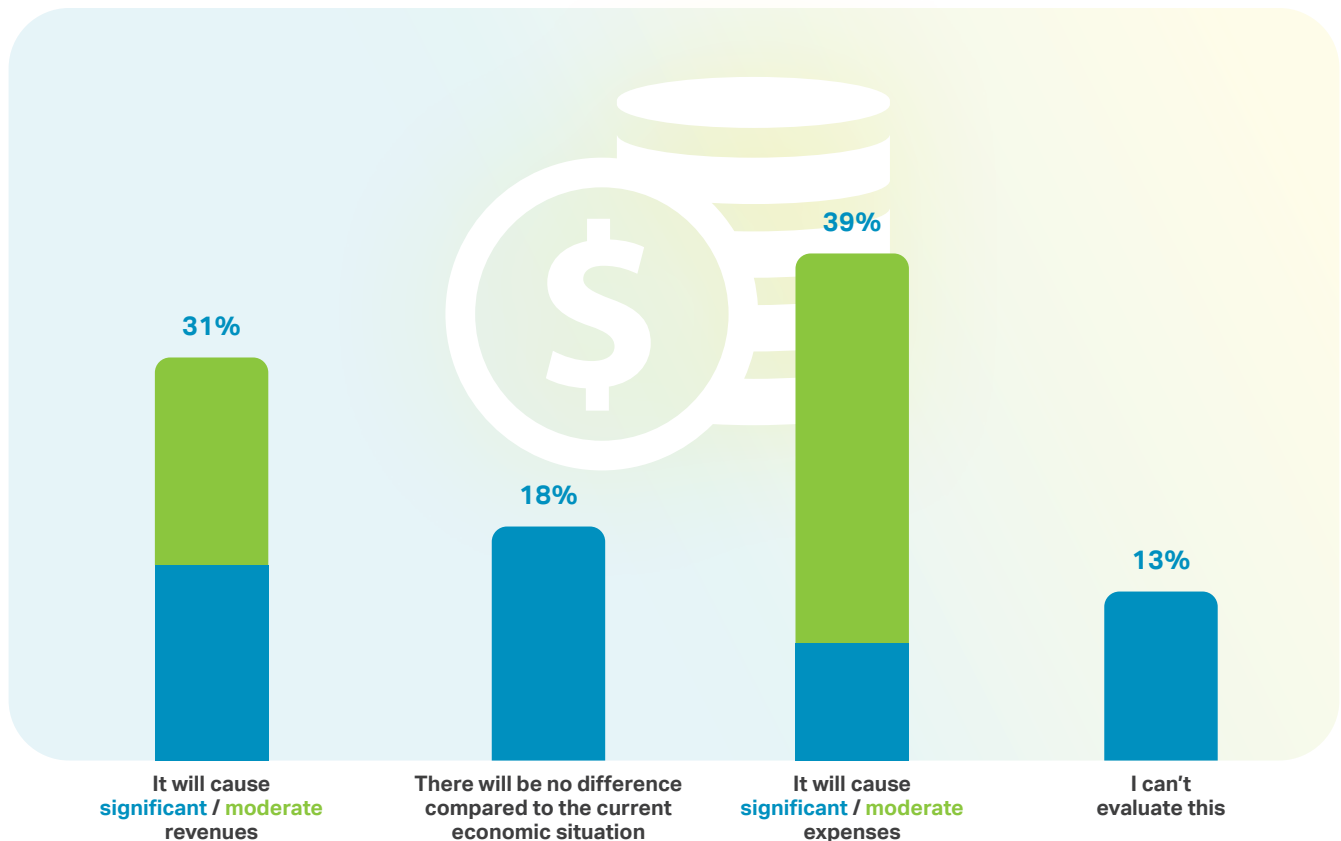
Reduce the amount of materials used during the operation and production



- Yes, we are currently taking such actions.
- We do not currently take such actions, but we plan to implement this by 2030.
- No, and there is no plan to implement such actions until 2030.
- It is not relevant for us.

Although resource issues have caught up with almost every company in recent years, posing significant challenges, **the recognition that cost reductions can be achieved through the circular economy is still lagging. Improving resource efficiency, including with water, energy, and raw materials, leads to financial savings.**

In your opinion, from an economic perspective, does the transition to a circular economy by 2030 represent an overall expense or revenue opportunity for your company?

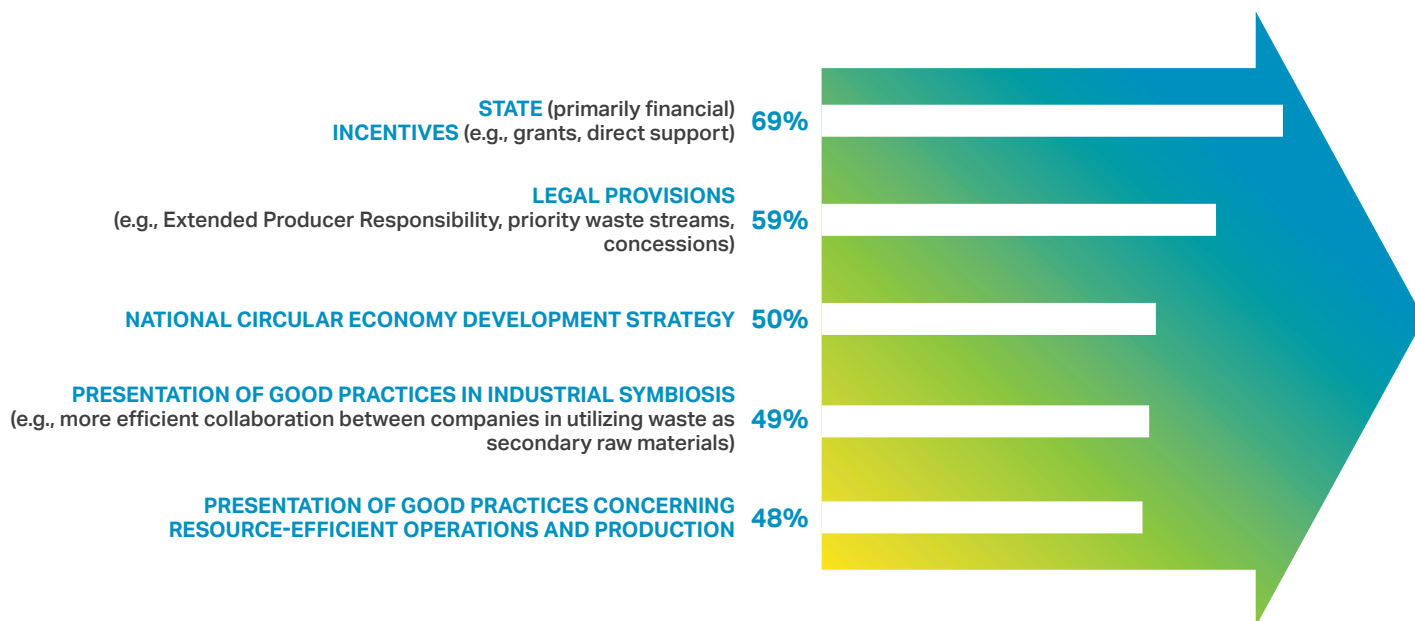


In this regard, there has been no change compared to the previous survey. **Thirty-nine percent of respondents view engagement with the circular economy as an expense, while 31% see it as a revenue-generating opportunity.** This is partly because the widespread adoption of complex circular economic models and strategic transformations has not yet begun.

Companies are keenly anticipating changes in the regulatory environment

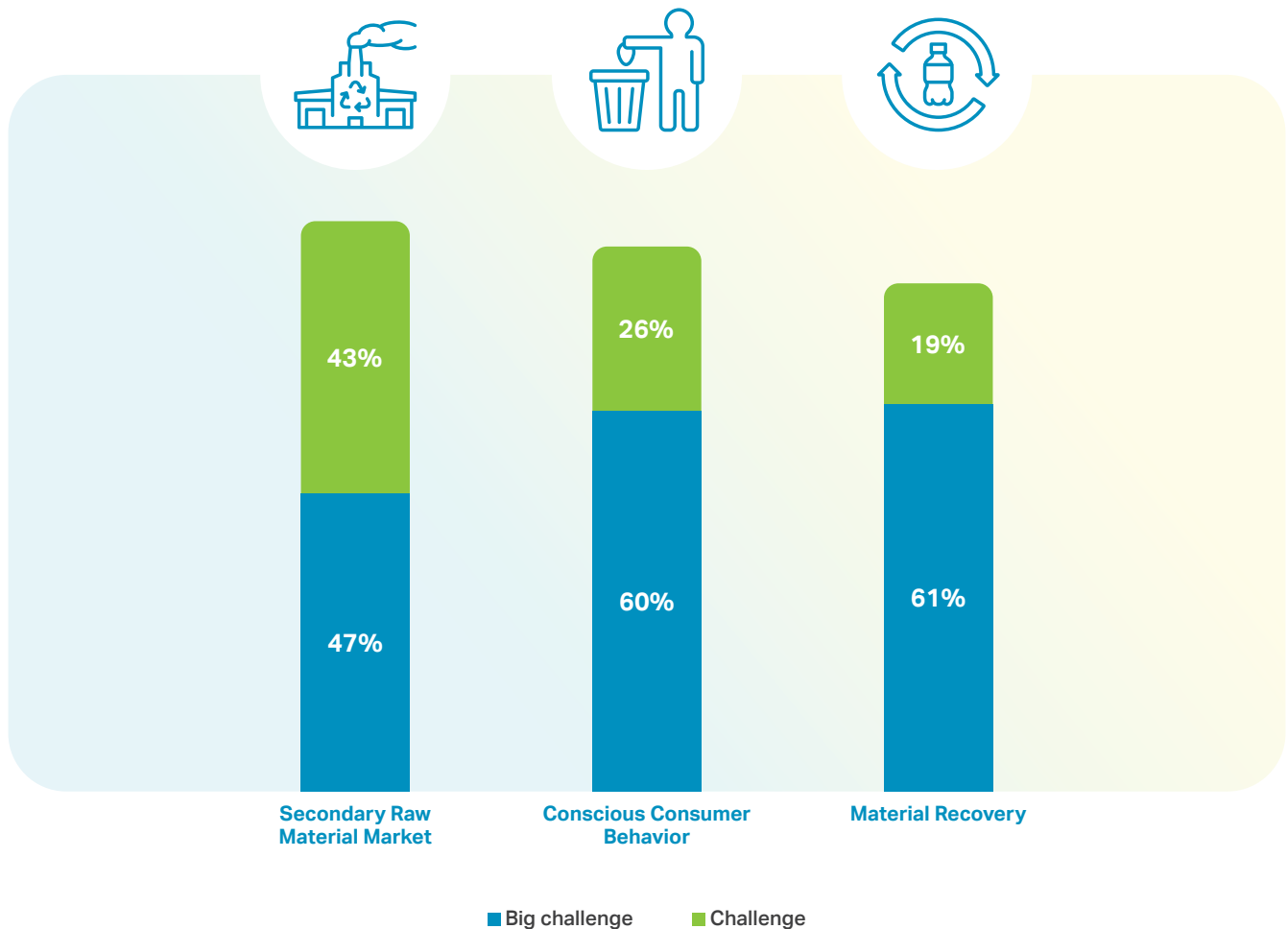
To accelerate the transition to a circular economy, further innovation and investment are needed. Therefore, **it is essential to determine who will finance the transition and what will make companies more interested in it.**

Factors perceived to contribute to the transition significantly



There is great anticipation among companies about state incentives and changes in the regulatory environment. In the past three years, Hungary has published several policy strategies directly or indirectly related to the circular economy. The greatest attention is focused on waste management **since a new waste management authority was established in 2021, which plans to transform the waste management market by introducing a concession system in 2023.** The most important policy measures include the **ban on single-use plastics in 2021, the elimination and prevention of illegal waste dumping, and the planned introduction of a deposit system for beverage packaging.**

Major challenges related to the implementation of the circular economy

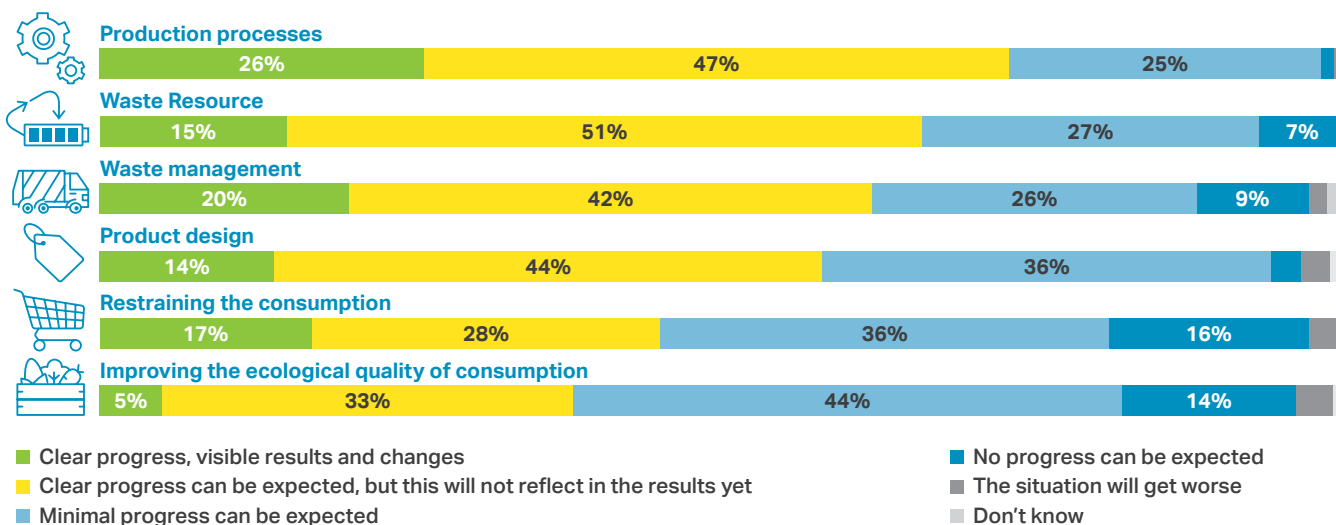


Compared to the previous research, it is evident that replacing single-use plastics and reducing food waste, which were pressing issues in 2019, are no longer considered urgent. Significant progress has been made in these areas, as with product packaging, due to changes in the regulatory environment and the adoption of well-established solutions, thus, these areas are **no longer perceived to pose such challenges for companies. Future challenges are much more related to products and production.**

Changing the production processes can be the driver

To accelerate the transition to a circular economy, further innovation and investment are crucial. Therefore, it is important to determine who will finance the transition and what will make companies interested in it.

How do you see the potential of development regarding the value chain processes of the EU Circular Economy Strategy in Hungary by 2030?



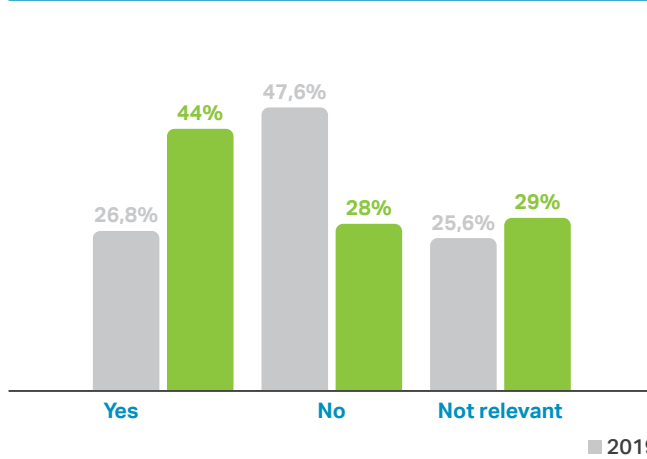
Hungary continues to rank 24th on the EU's 2022 Eco-innovation Index, lagging behind the EU average. Interestingly, according to the EU analysis, in Hungary, similar to in other former socialist countries, there is relatively high-level trade in used goods, meaning the secondary market, and a greater prevalence of repairing consumer goods compared to in more developed countries due to the social situation. However, **this does not go hand in hand with genuine environmental and sustainability consciousness**. This is why companies perceive that changing consumer behavior will not be the primary driving force behind any changes. Somewhat contradicting this position is that most respondents' current measures target consumers, albeit which activity plays an important role in building awareness. **Respondents primarily see the future in transforming production processes and achieving more (and more efficient) recycling of waste into material flows.**

One reason for Hungary falling behind the EU average is that the business sector is generally currently underperforming in this area. **Much more must be done to avoid the waste of valuable resources by ensuring more comprehensive material circulation. Investing in eco-innovation is necessary** to create a more productive and less resource-intensive economy, which can lead to significant benefits in terms of competitiveness and job creation.

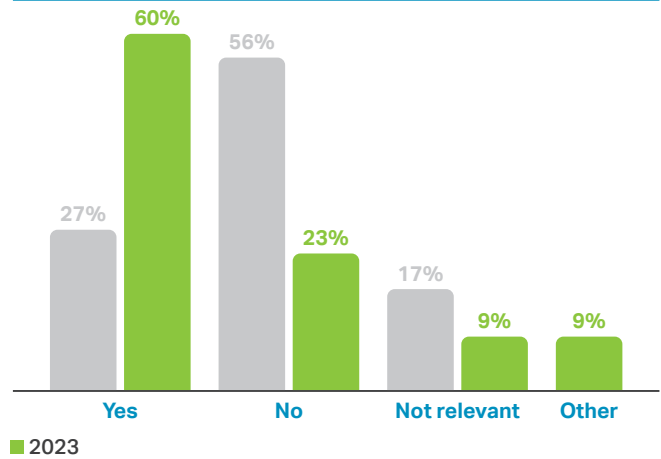
Shift from theory toward practice

Since the previous survey, the number of respondent companies that have implemented an environmental management system has nearly doubled, with 60% of participating companies already employing professionals dedicated to advancing circular economy principles.

Companies already have an environmental management system



Companies have experts dedicated to promoting the Circular Economy



The survey found support for the underlying goal that gave rise to the Circular Economy Platform. The Circular Economy Academy has fulfilled its role, as most companies are already familiar with the basic concept of circularity, and the educational objective has been achieved at a fundamental level. Instead of theory, the need for **practical solutions is increasingly coming to the forefront**, and companies are seeking assistance in this regard. **There is still a need for more knowledge sharing and information exchange, including exploring industrial collaboration opportunities, sharing pre-existing examples of best practice, and discovering opportunities for innovation.**

The circular economy is now an irreversible global trend, yet much work still needs to be done to achieve complete circularity and exploit the related competitive advantages.

THE FOCAL AREAS OF THE CIRCULAR ECONOMY PLATFORM:



Knowledge sharing



Innovation



Collaboration opportunities

BUSINESSES ALREADY HAVE SOLUTIONS

AGROLOOP

CIRCULAR PROTEIN PRODUCTION

In its circular model, Agroloop feeds byproducts from the feed value chain to insect larvae, which are then processed into premium feed ingredients for the feed industry. The main processes in the facility involve the production, breeding, rearing, and processing of larvae feed. Their products are made from mature larvae during industrial processing. The larvae rapidly increase their body mass, concentrating the wet biomass during the bioconversion process, which can be used to produce storable, high-nutrient feed products. These feed products and the compost generated during the process are returned to the raw material cycle. These locally produced products reduce dependence on unsustainably produced imports such as soy or fishmeal.

Auchan | RETAIL

"NEW LIFE BY AUCHAN" PROGRAM

In March 2022, the retail chain launched the "New Life by Auchan" program to combat the environmental impact of the textile industry by starting the sale of second-hand clothing under the name "New Life by Auchan." Since July 2022, used mobile phones have also been available through the program. Fully refurbished mobile phones are reintroduced into circulation with a one-year warranty and are offered at significantly lower prices than new ones. The company's revolutionary measures now extend to reducing electronic waste in addition to plastic and textiles. This program offers customers a range of high-quality products at more affordable prices than new ones, available online and in four stores.



COMPOCITY

The startup launched in 2020 with an indoor smart composting system centered around the CompoBot, an intelligent composter operated by friendly microorganisms. Within a few weeks, the CompoBot converts organic waste into nutrients and compost material without the need for worms and avoiding odor and maintenance. The resulting compost is returned to urban green areas, and feedback is provided to the community. Compocity also prepare sustainability reports that allow individuals and communities to track their environmental contributions. Currently, they are present in eight large companies, with 8,265 users, and prevented 2,489.6 kgs of CO2 emissions between 2020 and 2022.



CONSULTANCY FOR PLASTIC REPLACEMENT

Folprint Green Printing offers consultancy services for undertaking a comprehensive review of the use of plastic packaging, trays, boxes, etc. As a result of the study, they can propose how to optimize packaging based on environmental and economic considerations, resulting in the replacement of plastic packaging with paper-based alternatives. Paper packaging can be more easily integrated into the circular process. The project is currently in the implementation phase, and Folprint's new packaging manufacturing plant, a greenfield investment, will be completed and inaugurated in early 2023.



SECOND LIFE FOR FURNITURE

By 2030, IKEA aims to be sourcing all its materials from renewable or recycled sources. Currently, 60% of the materials used by IKEA are renewable, and 10% come from recycled sources. This makes sustainable, affordable, and high-quality home furnishing products more easily accessible. IKEA supports this goal through its "Second Life for Furniture" service, whereby customers can sell their unused furniture back to IKEA. After refurbishment, the furniture is made available at the Re-use Corner in IKEA stores. Here, unpacked and previously displayed items are sold, including products in their second or subsequent life stages.



IROTA ECOLODGE

CLIMATE-NEUTRAL AND CIRCULAR HOSPITALITY VENUE

In addition to being Hungary's only climate-neutral accommodation, Irota Ecolodge also showcases circular solutions. Their houses are built with a durable wooden structure that can serve as building material for new structures after their potential demolition. Cellulose insulation made from recycled newspapers is injected into the walls for thermal insulation. Rainwater is used for doing laundry, toilet flushing, and refilling the garden's bio pool, reducing water consumption by 40-60%. The furniture used in one of the houses (such as beds, wardrobes, chests, tables, and chairs) has been sourced and refurbished to serve new functions. Renewable energy sources are used for heating assistance, minimizing the use of firewood, in contrast to the typical wood-heating practices of the region.



VERTICAL INTEGRATION FOR A CIRCULAR ECONOMY

Master Good continuously minimizes the environmental impact resulting from poultry integration activities and has become the first company in Hungary to implement a complete circular farming system. In recent years, significant emphasis has been placed on developing environmentally friendly solutions that promote an entirely closed integrated operation. Circular solutions include creating treated and sterilized bedding material for chickens from leftover wheat straw after harvest, fermenting and utilizing chicken manure as organic matter after sterilization, using all slaughterhouse by-products for animal feed production, and producing feather meal for fish farming from poultry feathers. Master Good's Demonstration Farm in Baktalórántháza is an excellent example of a farm where management, mechanization, and technology application can reduce environmental impacts, enhance well-being, and produce high-quality products.



HUNGAROCCELL GREEN PROGRAM

Masterplast initiated the "Hungarocell Green Program" – the first circular economy system in the Hungarian construction industry. The unique program aims to prevent waste resulting from the use of polystyrene materials by implementing a collection and recycling system to produce thermal insulation materials. This recycled material contributes to improving energy efficiency and reducing CO2 emissions throughout the entire lifecycle of buildings. In 2022, MasterPlast recycled 10,000 m3 of material through the model. Over 100 partners nationwide have joined the program, creating collection and sales points called Eco Points to consumers.

MUNCH

APPLICATION FOR HANDLING THE ISSUE OF FOOD WASTE

Munch is a startup founded by young university students in 2020 to reduce food waste. The initiative has created a marketplace where hospitality establishments and even stores can sell food products that are approaching expiration at discounted prices to consumers. Since its founding, Munch has saved over 800,000 servings of food, avoiding approximately two million tons of greenhouse gas from being emitted. They have also built a Facebook community with tens of thousands of followers over the years. Additionally, through collaboration with the Hungarian Food Bank "MunCharity," they assist disadvantaged families.



RAKUN

RAKUN BOX COMMUNITY

Since 2020, the Rakun Box Community has been offering a sustainable alternative that helps avoid plastic food containers ending up in landfills and oceans. They are the first enterprise in Hungary to deal with the circularity of food storage boxes. Their subscription system enables anyone to request food in reusable containers instead of disposable plastic ones for home delivery or takeaway. The boxes remain within the system in a circular manner (up to 1,000 reuses), eliminating unnecessary and harmful waste. Currently, 96 restaurants across 16 different cities use their boxes, and the use of nearly 40,000 disposable containers has been avoided since their launch.



Unilever

CIRCULAR SOLUTIONS DURING THE EXPANSION OF THE NYÍRBÁTOR FACTORY

Unilever's "Zero waste to landfill" strategy has prompted the company to explore numerous innovative waste management solutions. One significant outcome of this strategy is the expansion of the Nyírbátor household product factory using an investment of 15 billion Hungarian forints. Alongside technological modernization, a strong emphasis has been placed on environmental innovation. The factory already implements several environmentally friendly solutions. For instance, 70% of the packaging materials produced there are made from recycled plastic. Approximately 40% of the wastewater generated on-site is reused internally, while the remaining portion undergoes thorough filtration and purification within the factory before being discharged back into the environment. Moreover, starting in 2021, the factory's electricity supply will be sourced 100% from renewable energy. The ongoing expansion project has elevated the implementation of circular economy practices to a higher level. During construction and demolition processes, no waste is sent to landfills, as all waste materials are fully recycled either on-site or through partnerships with expert collaborators.



HELLO ALU, HELLO SUSTAINABLE FUTURE!

Real change begins with collective actions.

The aluminium can of each and every HELL ENERGY product contains at least 75% recycled aluminum. However, sustainability cannot be achieved alone. In 2022, we launched our HELLO ALU! program, inviting our consumers to join us in collective action, engaging in exciting, playful initiatives that serve good causes, all aimed at making aluminum truly everlasting. Over the past year, we have collected and kept tens of thousands of cans in circulation at 18 locations together. And we are just getting started...

helloalu.hu

HELLO ALU – Powered by HELL ENERGY



BIM

„KNOWLEDGE SHARING
FOR A MORE SUSTAINABLE FUTURE”

FOR SHARE

<https://market.hu/dokumentumkategoria/4/bimforshare>

McDonald's for the communities



BringaMánia*

Tour de Balaton

Last year, we cycled
396 358 km
together
(as if we had gone
to the moon)
with more than
3 000
participants



Tour de Tisza-tó

59 710 km
It's as if we'd gone round the Earth
one and a half times at the equator



More than
1 000
participants

Sponsorship

McDonald's FairPlay Cup



we moved nearly
9 000 young people
during the 2022/2023 season with
440 institutions and
853 teams

McDonald's Junior and 3x3 Championship

in the 2022/2023 season, we have
moved more than

3 000
children in
partnership
with the MJSZ



Ronald McDonald House Charities*



774
families
helped

4 247
nights spent
with us



+380
days
for mothers
in the day care

+531
occasions in the
Debrecen Family Center



McDonald's support program for the employment of young people*

13
local
organizations

5
local
programs

130
young
people

more than
1 000
training hours

*end of 2022 figures

WE BELIEVE IN INNOVATIVE SOLUTIONS

At Rossmann we find it important to understand the environmental, social and economic impacts of our activities. Our goal is to reduce the burden our operations cause to the environment. We think about sustainability in a holistic manner, we have an innovative approach to problem solving - these are reflected in the development of our products and our services as well.

This year Rossmann and Respray joined hands resulting in the automatic refillable deodorant spray technology. This solution not only results in reduced packaging, but also helps extend product life cycle. By using Respray deodorant spray, the environmentally conscious customer can reuse the bottle up to five times, reducing their carbon footprint by a quarter. The vending machines are now available in our Budaörs and Mammut II stores.



**We believe in the power of collaboration.
We like to think together with young innovators about new ideas and solutions.**

ROSSMANN
Drogeria Parfüméria

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