

Wednesday, 5 April at 16:00 CEST / 10:00 EDT on Zoom





## **Ruben Dubelaar**

**Advisor International Strategy** 





#### **MEET OUR SPEAKERS**



Colin Isaacs
Executive Director

Canada Circular Hotspot



Arnoud Passenier
Strategic International
Advisor

Ministry of IenW, NL



Joe Hruska
Vice President
Environmental Affairs

Pathway Group (CA)



Dr. Esther van den Beuken

Principal Consultant Circular Plastics

TNO (NL)



Harmen Otten
Project Manager

Van Werven (NL)

#### **PROGRAMME**

1. Welcome Words

Marjan Lahuis, Consulate General of the Kingdom of the Netherlands in Toronto (CA)

2. Evolution of Post-Consumer Recycling of Plastics in Canada

Colin Isaacs, Canada Circular Hotspot (CA)

3. Circular Plastics Policies in EU and NL

Arnoud Passenier, International Department Ministry of Infrastructure & Water Management (NL)

4. Canada Policy Developments: Banning Single Use Plastics (SUP)

Joe Hruska, Pathway Group (CA)

5. New Technologies: Improved Plastics Reuse and Recycling

Dr. Esther van den Beuken, TNO (NL)

6. Accelerating Recycling of Bulky Rigid Plastics

Harmen Otten, Van Werven Recycling (NL)

7. Best Practices in Circular Approach: Plastics

Joe Hruska, Pathway Group (CA)

8. Q&A and Closing Remarks

## **Marjan Lahuis**

Senior Advisor Economic Affairs, Consulate of the Kingdom of the Netherlands in Toronto, CAN





## **Colin Isaacs**

**Executive Director Canada Circular Hotspot** 





## **Evolution of**

## **Post-Consumer Recycling of Plastics**

### in Canada

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Canada Circular Hotspot
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Phone Toronto +1 416 410 0432 Fax +1 416 362 5231
Email: <a href="mailto:colin@cialgroup.com">colin@cialgroup.com</a>
5th April, 2023



### Canada

• 10 provinces & 3 territories

• Land: 9,093,507 sq km

• Water: 891,163 sq km

• Border: 8,893 km

(includes 2,477 km with Alaska)

• Coastline: 202,080 km

• Highest point: Mount Logan 5,959 m

• Arable land: 4.57%

Second largest country after Russia

• Population: 39,000,000; population growth 0.89% per year

90% of the population is concentrated within
 160 km of the US border





## **Timeline of Curbside Recycling**

• 1969 – 1981	Environmental groups rally public support for recycling
• 1981 – 1986	A waste management company piloted Blue Box recycling in Kitchener, Ontario
• 1986	Public opinion demanded that Kitchener City Council make Blue Box recycling permanent
• 1986 – 1989	Ontario provincial government reluctantly rolled out Blue Box across entire Province
• 1987 – 1995	Curbside recycling expands to most Canadian cities. Some deposit-refund systems continue, mostly for beverage containers.







## **Canada Circular Economy**

- The Federal Government of Canada is explicitly moving slowly towards adoption of a Circular Economy
- Three (out of 10) provinces have already adopted strategies which explicitly include Circular Economy. One, Ontario, already has a Circular Economy Act that addresses recycling of some post-consumer materials including plastic packaging
- Circular Economy is on its way to becoming entrenched in Canadian business and government thinking but there is still be lots of learning to do



## **Governance of Recycling in Canada**

- The Federal Government has almost no role in household recycling but can play a persuasive role with provinces and municipalities.
- The Provinces now have legislation which provides a framework for household recycling. Recycling laws in each province are slightly different.
- Rules governing household recycling are the responsibility of municipalities. Each municipality has slightly different rules, for example on what materials must be collected in a municipal recycling program.
- Some municipalities run recycling collection and processing facilities themselves. Others contract these services to the private sector.
- The environmental performance of collection and processing facilities is regulated by the province in which the facility is located.
- Initially funding for recycling came from the province, the municipality, and industry. Now all funding is moving towards Extended Producer Responsibility (EPR).



## Weaknesses in Canadian household recycling programs

- Collection has plateaued at about 40% of recyclable materials
- Only about 10% of end-of-life plastics are collected and recycled
- Canada has far fewer plastics recycling facilities than are required to process and make use of the available plastic materials
- There are very few industrial scale upcycling, closed loop recycling, or quality downcycling facilities for many resin types



## Reasons for these recycling weaknesses

- Canada's population is thinly spread over very large distances.
- Recyclable materials are governed, and often considered, as "waste".
- Cost of recycling is usually considered as an addition to waste management budgets without considering avoided landfill costs.
- Contamination of recycling streams is a significant problem (typically 4% or more) and is made worse by inadequate public education.
- Labelling of recyclable materials is confusing to the public.
- Investment in companies that recycle end of life materials and make use of the PCR material is not encouraged by government regulations and lack of demand for PCR material

Governments hope that EPR will resolve some of these issues.



## **Arnoud Passenier**

**Strategic International Advisor, NL Ministry** of Infrastructure and Water Management



Ministerie van Infrastructuur en Waterstaat





## **CIRCULAR ECONOMY**

Plastics Policy in the Netherlands

Arnoud Passenier Strategic International advisor Circular Economy

Plastics and CE webinar Canada-NL

April 5th, 2023



#### **PLASTICS**

- Often most sustainable material...
- Low environmental footprint, except microplastics....
- We use it badly (wastage) and we have to get rid of our addiction to fossiles

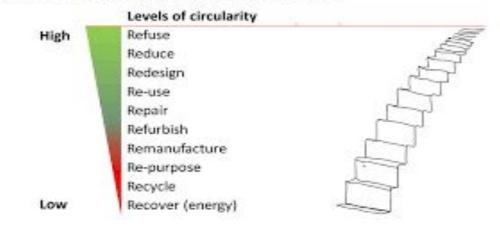




### **Circular Plastics Policy**

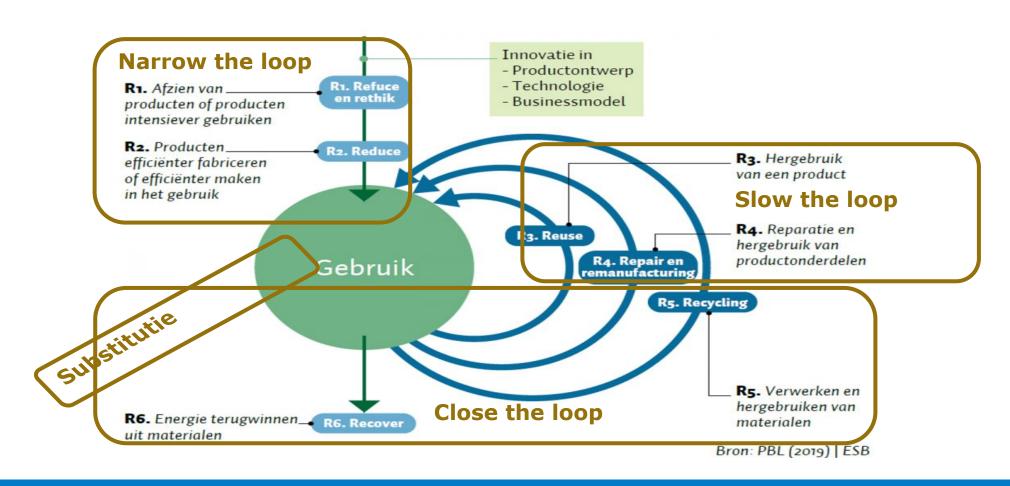
- Plastics policy is based on the 10 circular strategies:
- Narrowing the loop: less use of raw materials by reduce, sharing/reuse
- **Slowing the loop**: longer and more intensive use by repair, refurbish, repurpose
- **Closing the loop**: recycling, use of recycled content, substitution to use of biobased plastics

Ladder of circularity: Give priority to the options that are as high as possible on the ladder (10 R's)



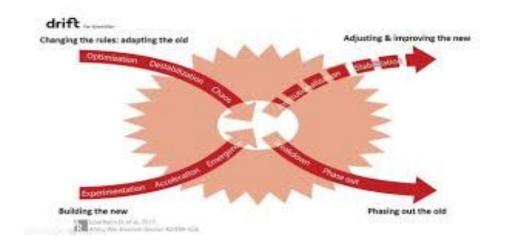


#### **Strategies: Narrow – Slow - Close the loop**





#### Interventions to accelerate











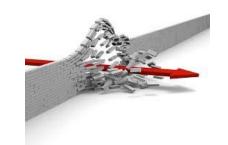
- Regulate by landfill ban recyclable materials + no free plastic bags (+ no free returns?)
- Incentivize the market: tax on
   CO<sub>2</sub>-emissions/incineration/export + EPR (including eco-modulation) + Redesign products & services
- Show what you tell others: use circular procurement
- Invest in smart collection & sorting and educate (skills & awareness)
- Innovate together with industry (collaborative approach)



## **Roles of government**

Sometimes we use all roles in one conversation...:

- Connect the networks to collaborate along and between value chains
- Challenge the industry to raise the bar and proof impact
- Support to enable innovations getting to the market
- Regulate to create (ambitious) framework (& level playing field)











#### **Circular Plastics: how?**

- Make it practical!
  - Promote redesign by CIRCO programme to support industry to rethink products & services
  - Create guidelines for industry on using less and mono- materials (design for disassembly, design for reuse, design for recycling)
  - Develop **Roadmap on Reuse & Refill systems** with industry (and academia) to drive back single-use packaging; demand commitment to implement Roadmap by monitoring
  - Invest in test facilities for sorting & recycling (NTCP)



## **Public-private collaboration**

Focus on innovation & smart collaboration in supply chain:

- Create trust, be transparent
- Start small, inspire others
- Work together (big & small)
- Implementation & monitoring are key for success!
- Convince others to join: develop common vision and narrative with concrete deliverables

#### Examples:

- Plastics Pact NL
- European Plastics Pact







**EUROPEAN** 



#### More information?

#### **Contact me!**



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## Joe Hruska

**Vice President Enviornmental Affairs** 







# Canada Policy Developments: Banning of Single Use Plastics

Holland Circular Hotspot Webinar

Joe Hruska Vice President Environmental Affairs

**April 5, 2023** 



#### **About Pathway Group**



Government Relations and public affairs are the cornerstones of our business. Since 2002, Pathway Group has helped to build effective win-win relationships between our clients and government.

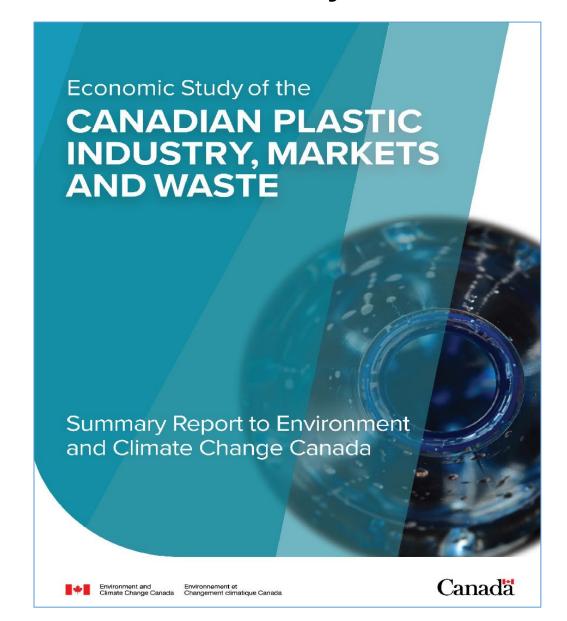


#### **Overview**

- 1. Economic Summary Plastic Resin & Products Industry Canada
- 2. Economic, Markets & Waste Study Canada
- 3. Plastics Management in Canada
- 4. Canada Plastics Regulations Canadian Environmental Protection Act (CEPA) & Single Use Plastics (SUP) Bans
- 5. Circular Economy (CE) for Plastics Developing
- 6. Innovation, Technology & Design for Circular Economy
- 7. Circular Economy (CE) and Sustainable Material Management (SSM)
- 8. The Future Making CE More Effective for Society



### **Economic, Markets & Waste Study Canada**





#### **Economic Summary Plastic Resin & Products Industry Canada**

Total Sales: CA\$35 billion

5% of Canadian Sales Manufacturing

Plastic resins
 CA\$10 billion

> Plastic manufacturing CA\$25 billion

#### **Employment in Canada**

Direct Employment 93,000

o Indirect Employment est. 279,000

○ Establishments 1,932 – 2,600

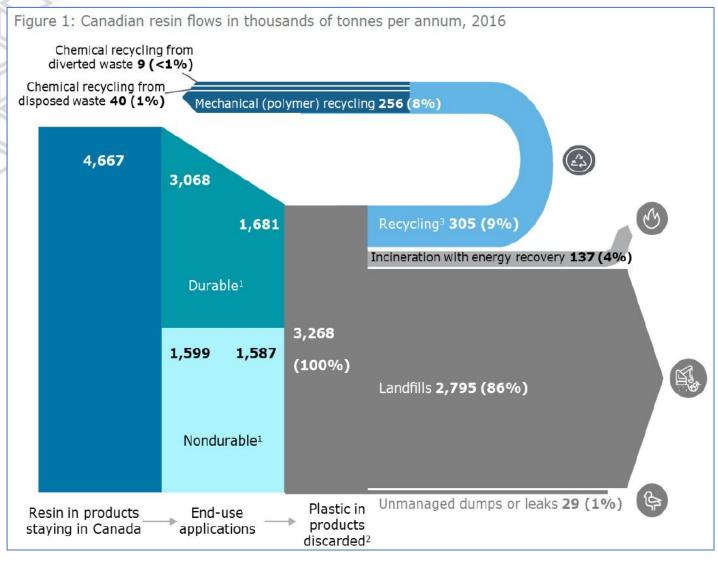
#### **End Uses**

Packaging, construction and automotive account for 69 percent of plastic end-use

Balance of uses white goods, textile, electrical and electronic equipment



#### **Plastics Well Managed in Canada**



## Need to shift to Circular Economy to retain plastics benefits

- 86% landfilled or "Missed opportunity – belongs in the Circular Economy"
- 9% recycled
- 4% energy recovery
- 0.6% leaked into environment through unmanaged landfills & leaks/litter



- G7 Oceans Charter Canada committed to Zero Plastics Waste
- June 2019 Canada announced SUP Bans by 2021 <u>before Science Assessment started and released.</u>





- May 2021, Canada designates "plastic manufactured items" TOXIC in CEPA
   ignoring provincial jurisdiction over waste & resources Govts. own Science Assessment does not support designation.
  - Industry & provincial judicial enquiry challenge March 2023
- June 2022 Canada bans SUP's declared more to come





#### **Coming into force dates:**

#### Check-out bags, cutlery, foodservice ware, stir sticks, straws

- manufacture and import December 20, 2022
- sale December 20, 2023
- export December 20, 2025

#### Ring carriers

- manufacture and import June 20, 2023
- sale June 20, 2024
- export December 20, 2025

#### SUP flexible straws packaged together with a beverage container

- sale June 20, 2024
- export December 20, 2025

Source: Single-use Plastics Prohibition Regulations Technical Guidelines, Environment and Climate Change Canada



#### **Canada Plastics – Other Policy Developments**

- Canada-wide rules to strengthen recycling and composting of plastics through accurate labelling in development
- Recycled Content Regulations anticipated in 2023
- Recycled Plastic Content Products Standards Development by Bureau de normalisation du Quebec (BNQ) - D 3840-100-2 – expected to compliment recycled content regulations.



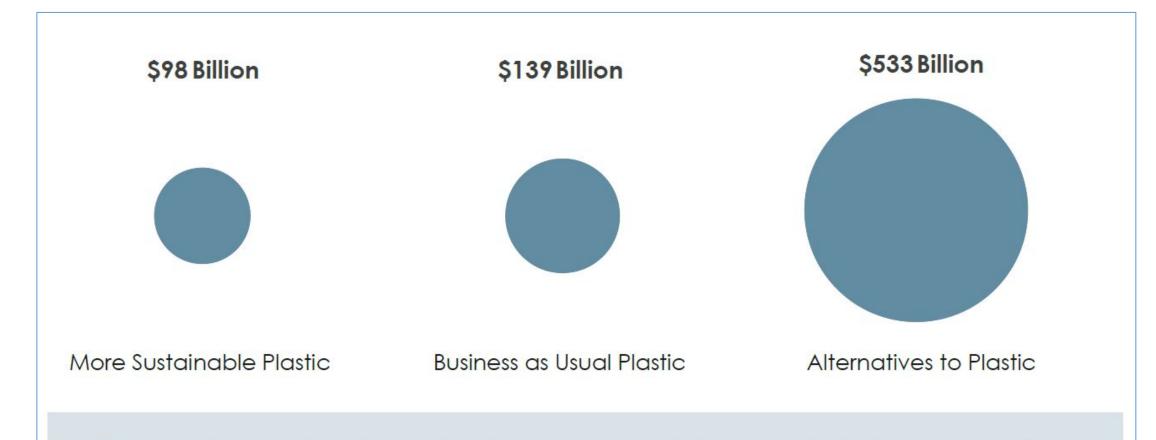
#### **Bottomline** – "You Cannot Ban Your Way to a Circular Economy"

Unintended negative consequences:

- Uncertainty for infrastructure & innovation investments; Circular Economy for plastics inhibited; less Circularity
- More waste, carbon, economic, environmental, social impacts and less conservation of resources
- Circular Economy stakeholders need to recognize the impacts of their decisions & material choices



# **Trucost - Plastics and Sustainability:** A Valuation of Environmental Benefits, Costs and Opportunities for Continuous Improvement



The cost of using alternative materials is approximately four times that of using plastic (in a business as usual scenario). We're producing more and more consumer goods, so choosing the material that creates the least impact is important.



## Innovation, Technology & Design for CE

Innovations proposed by the plastics industry address environmental and economic concerns. Plastics carbon footprint 4 x's less than alternatives. Plastics aligned with climate change, 3 R's and CE goals with reduced energy use:

- Plastic reusable retail bags designed to be reused 125 times, will have up to 40% recycled content highly Circular Economy - 100% recyclable – current reusable bags not Circular - end up in landfill end–of-life
- New certified compostable straw technology designed from renewable resources is performs like plastic but is compostable on land and marine environments.
- New chemical recycling technologies making plastics a more Circular material through 21<sup>st</sup>
  Century advanced depolymerization technologies returning plastic molecules back into the
  economy.
- All of these advancements support the Zero Waste goals and building the Circular Economy, with jobs and investment



# **Circular Plastics Economy Development**

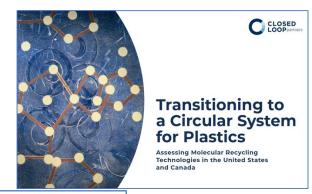
- Plastics a relatively new 21<sup>st</sup> Century material vs alternatives
- The "new kid on the block" is accelerating development of mechanical & advanced recycling technologies coupled with expanding EPR collection, recycled content with sustainable design & technology focus.











Dow and Mura Technology announce largest commitment of its kind to scale advanced recycling of plastics

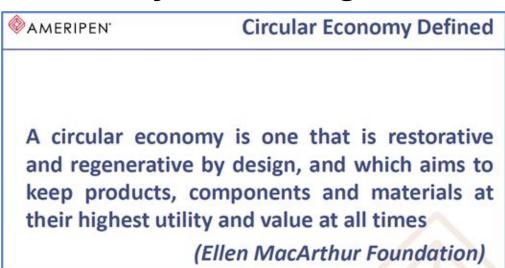


NOVA Chemicals and Merlin Plastics Join Forces to Use Curbside Recycling for Consumer Packaging





# Circular Economy (CE) & Sustainable Material Management (SSM) – Life Cycle Thinking



SMM is an approach to promote sustainable materials use, integrating actions targeted at reducing negative environmental impacts and preserving natural capital throughout the lifecycle of materials.

**MAMERIPEN** Sustainable Materials Management Defined

(OECD)

#### Packaging should be evaluated against its role in protection

- A CE Model would focus on the package independent of its role in protection, therefore emphasis
  would be on which package offer most reuse or recovery.
- The SMM Model would include analysis of packaging's role in protection. Loss of food would be included in assessment of cumulative impact.

Source: Ameripen, Maximizing the Benefits of Circular Economy and Sustainable Materials Management Models For Product-Packaging Systems



## The Future – Making CE for Plastics More Effective for Society

- The benefits of plastics: lightweight, durable, reusable & recyclable, economical, saves lives, protects our health, extends and keeps food supplies healthy and more.
- Often overlooked is the reduction benefits of plastics in the use of resources & energy.
- Innovations and technology <u>require the financing and time</u> to support Circular Economy and Societal Goals.



Joe P. Hruska Vice President Environmental Affairs

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Cell: +1 416-930-1796

# Dr. Esther van den Beuken

**Principal Consultant Circular Plastics** 





# NEW TECHNOLOGIES: IMPROVED PLASTICS REUSE AND RECYCLING



DR ESTHER VAN DEN BEUKEN



# TNO: Dutch independent research organisation

KNOWLEDGE

APPLICATION

Contract research

for and with customers

Embedding in the market

(with TNO companies)

#### **TNO's MISSION**

FUNDAMENTAL

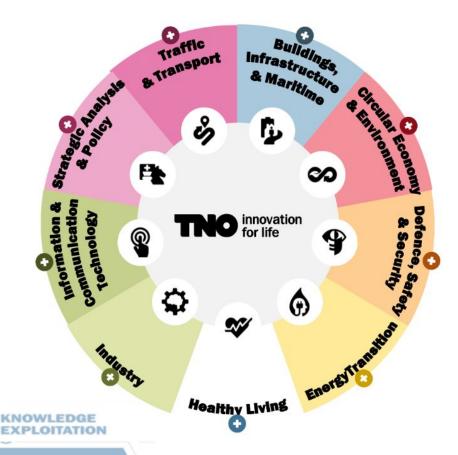
KNOWLEDGE

With universities

TNO connects people and knowledge to create innovations that boost the competitive strength of industry and the wellbeing of society in a sustainable way.

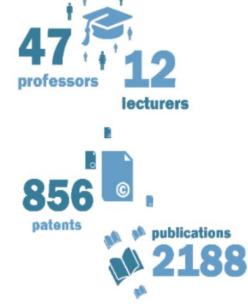
With partners in

the golden triangle



#### **KEY DATA**





# **CIRCULAR PLASTICS AT TNO**



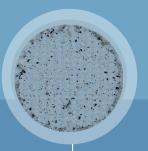












SYSTEM INTEGRATION
VALUE CHAIN DESIGN AND
LIFE CYCLE ASSESSMENT

2 DESIGN FOR / FROM RECYCLING

3 PRETREATMENT

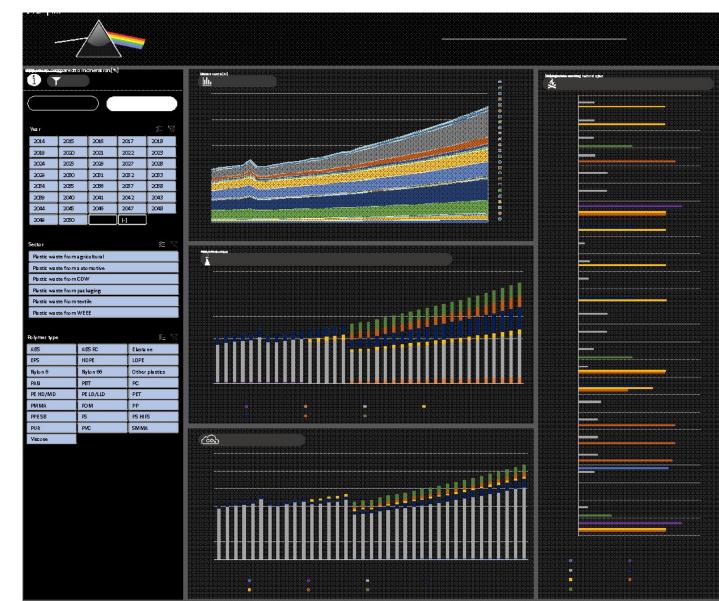
RECYCLING

MICROPLASTICS

# PLASTICS RECYCLING SCENARIO MODEL (PRISM)

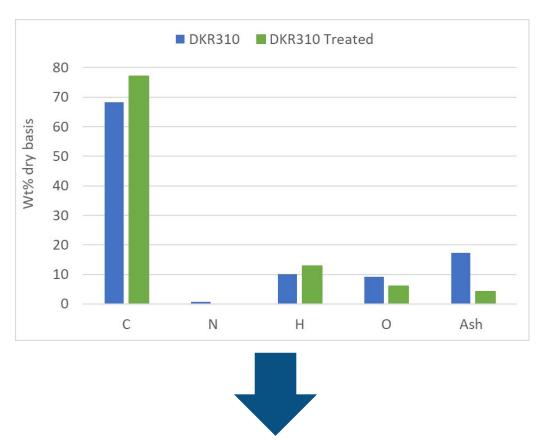
A techno-economic optimization model that supports decision making by stakeholders in plastic value chains by

- sketching the future plastic waste and recycling potentials (The Netherlands 2030/2050) and
- estimating the societal (environmental, economic) life cycle effects of policy measures in such future scenarios.



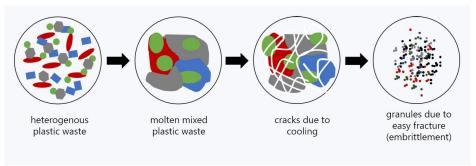
## **DECONTAMINATION TECHNOLOGY: UPWASH**

## TYPICAL RESULT

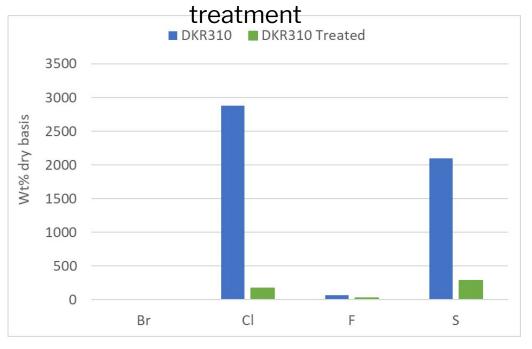


Strong reduction on ash composition upon treatment

Reduction of the organics fraction (O content)



### Strong reduction of Cl and S upon



## STATE OF ART – SOLVENT-BASED RECYCLING/DISSOLUTION



**PVC** 

o Vinyloop (soft PVC). Solvay pilot plant (2002) in Italy for 10 kt/a closed in 2017



- PolyStyreneLoop in Terneuzen (NL), 3 kt/a (EPS)
- o Polystyvert, Montreal (Canada)
- o Recycling Avenue: dissolution of ABS and HiPS from WEEE, 3 kta (NL Q4 2022)
- o TNO Möbius: PLAST2bCLEANED dissolution of ABS, Br and SBO3 (NL/DE: pilot)





#### PP/PE

- o Obbotec (Plant One): planned to recycle a mix of waste plastics into near virgin PE & PP materials
- o TNO Möbius (Chemelot): PE/PP
- o CreaSolv pilot (Unilever) in Indonesia, 1 kt/a flexibles plastic to recover PE
- o PureCycle Technologies with P&G to purify PP, (2022) USA
- APK Newcycling: multilayer packaging to produce LPDE/PA. 20 kt/a pilot plant Germany
- o Sulayr: PE lining from PET packaging, 22 kta. Spain





## STATE OF ART: CHEMICAL DEPOLYMERISATION

#### **DEPOLYMERISATION:**

Reverse polymerisation of polycondensation polymers with heat and catalysts, purification to recover pure monomers or oligomers in water, alcohol or amine solvents.

Possible polymers: PET, PA, PC, PU, PLA, PHA, PEF

#### PET, PACKAGING, BOTTLES

- o CURE (Netherlands), 25 kt/a in Emmen (NL) in 2021
- IONIQA (Coca Cola), 10 kt/a plant in Geleen (NL) in 2021
- o Gr3n, microwave assisted process. Switzerland pilot plant since 2014
- o Carbios (FR), biodegradation of PET
- Loop industries, L'Oreal, Coca Cola, Danone, Nestlé. 21 kt/a plant with Indorama in 2020
- Garbo/ChemPET 35 kt/a plant in Cerano (Italy)
- o PerPETual, 2 million plastic bottles (India)
- o DuPont-Teijin

#### PA, POLYAMIDES, NYLON

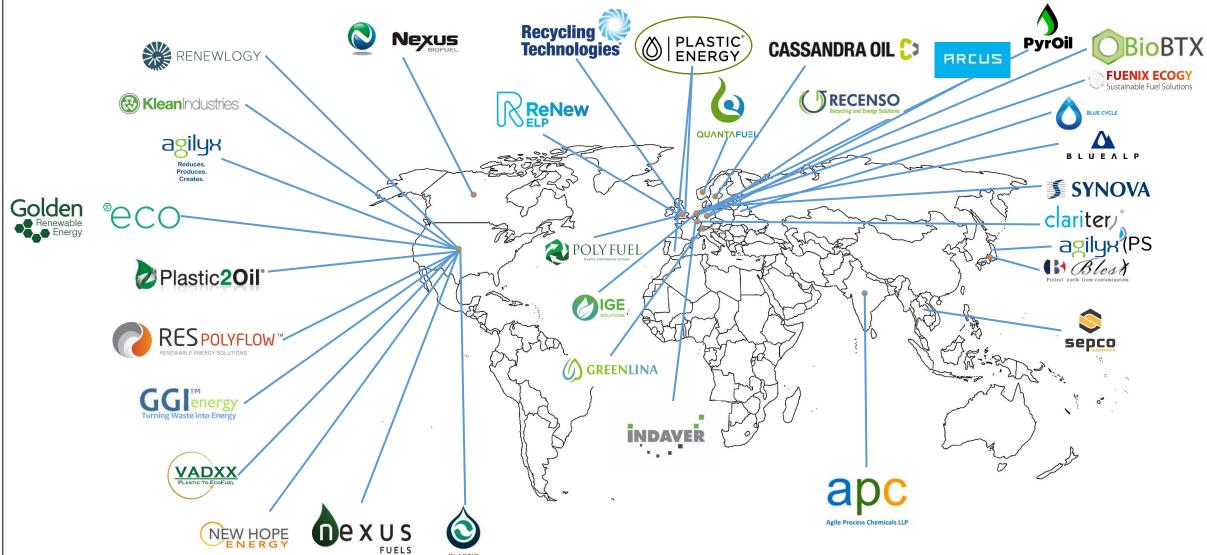
- Fibrant (Netherlands): used into new nylon yarn (fish nets, carpets)
- Aquafil (Italy), used into new nylon yarn (fish nets, carpets)



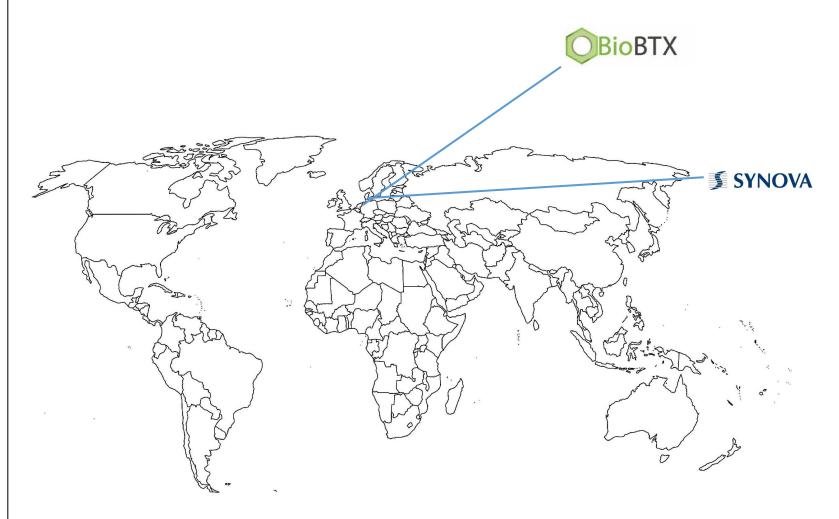


## **PYROLYSIS INITIATIVES ON INDUSTRIAL LEVEL**

RECYCLING



## **PYROLYSIS INTIATIVES ON INDUSTRIAL LEVEL**



#### Unique value proposition

- Focus on complex waste mixtures
  - Plastics
  - Biomass
  - Versatile in composition
- BioBTX: from waste to BTX
- Synova: in single step from waste to valuable chemicals
  - Olefins and aromatics
  - Replace pyrolysis and naphtha cracker operations
- 100% circular plastics enabled

## CIRCULAR PLASTICS NL

Program Size > 450 M€

(220 M€ NGF contribution)

Value chains

Food packaging

**Textile** 

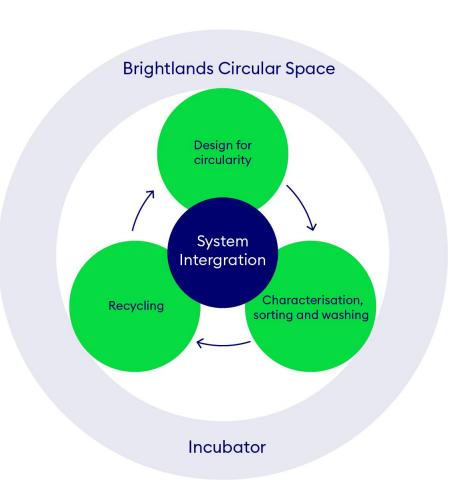
Carpets

Personal hygiene

**Electronics** 

**Mattresses** 

Car tires



**Impact** 

Zero CO2 emissions

100% circular

Contributing parties

Plastic producers

Plastic converters

**Brand owners** 

Public organizations

Waste collectors

Waste treatment

Recyclers

# **MORE INFORMATION CIRCULAR PLASTICS TNO:**



#### **CONTAC**

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esther.vandenbeuken@tno.n



Tim.bulters@tno.n

plastics@tno.nl

# **Harmen van Otten**

**Project Manager** 







# recycling plastics

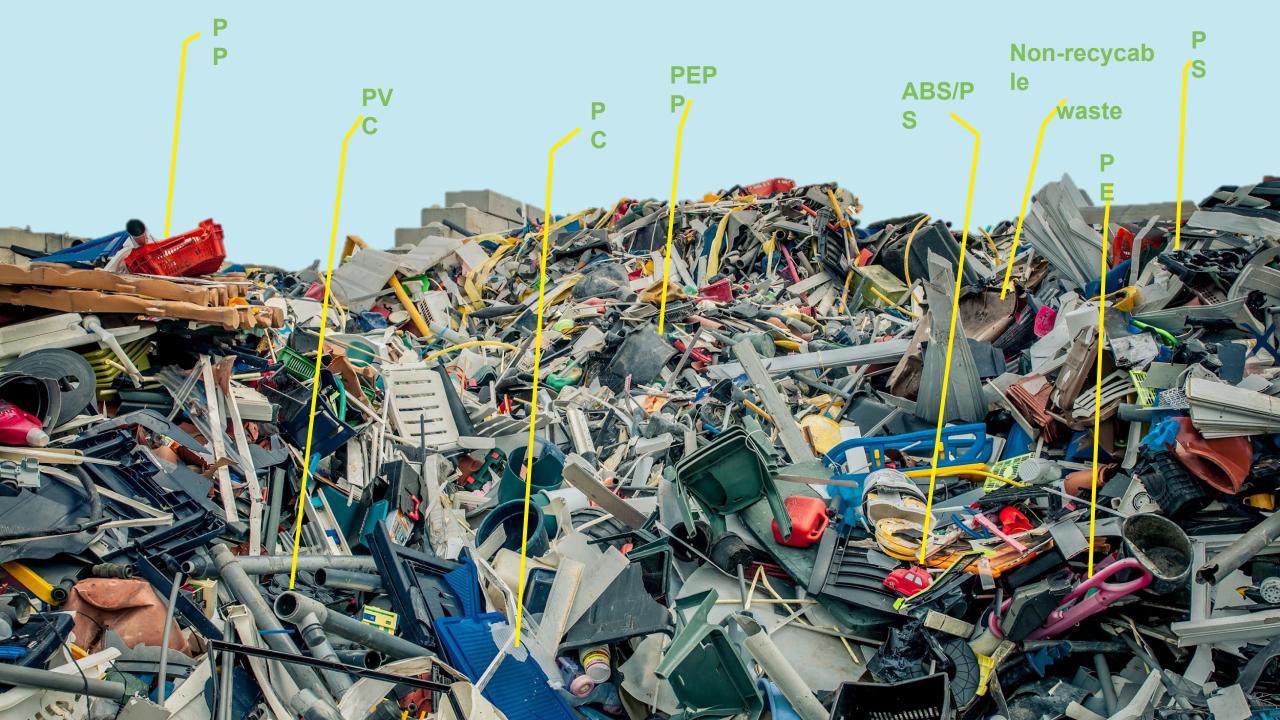
It's our mission to close the loop by recycling Dastics.eu

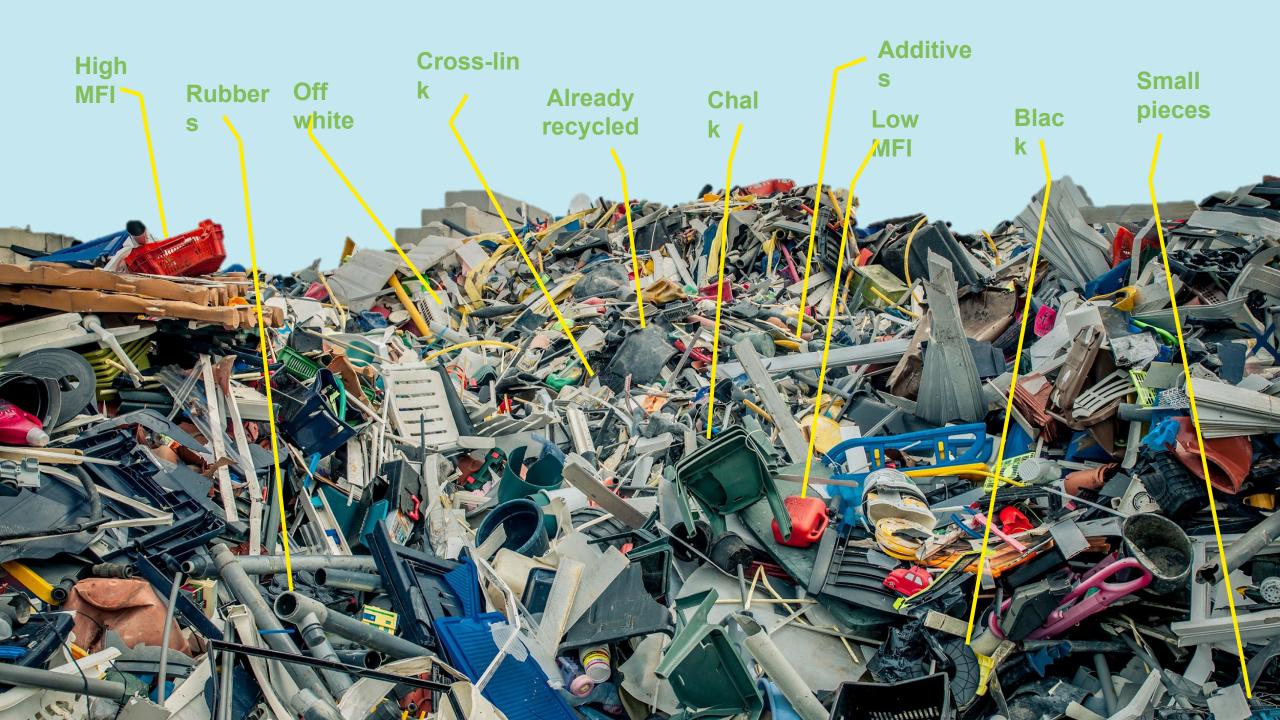




2006

**Start recycling** rigid plastics



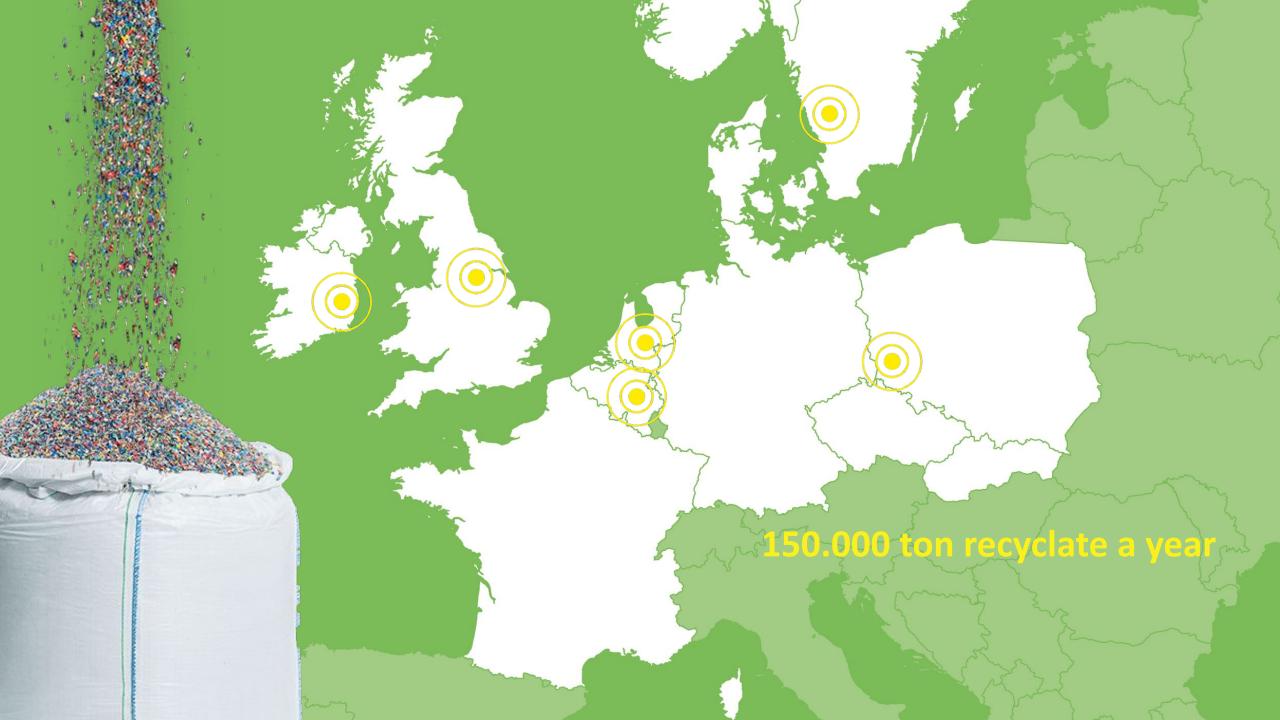




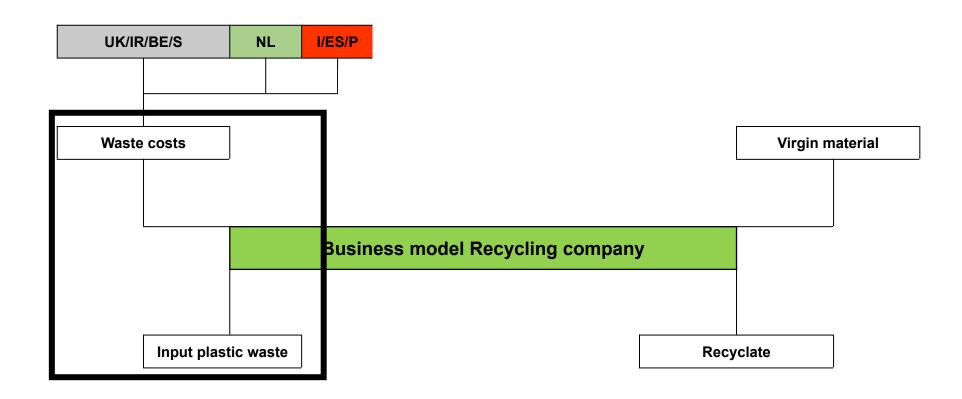
# Use of recyclate PP-PE-PVC-ABS-PC-PS

- Buildings
- Transport
- Furniture
- Automotive
- Household products



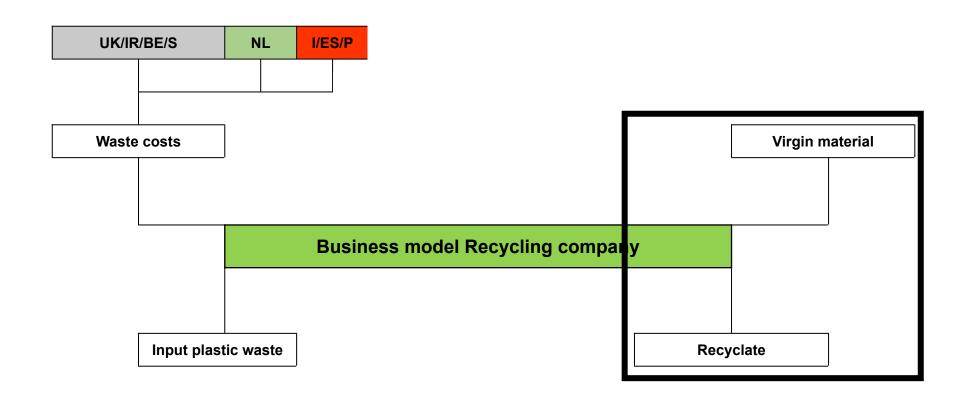


Achievability business model is depending on legislation.



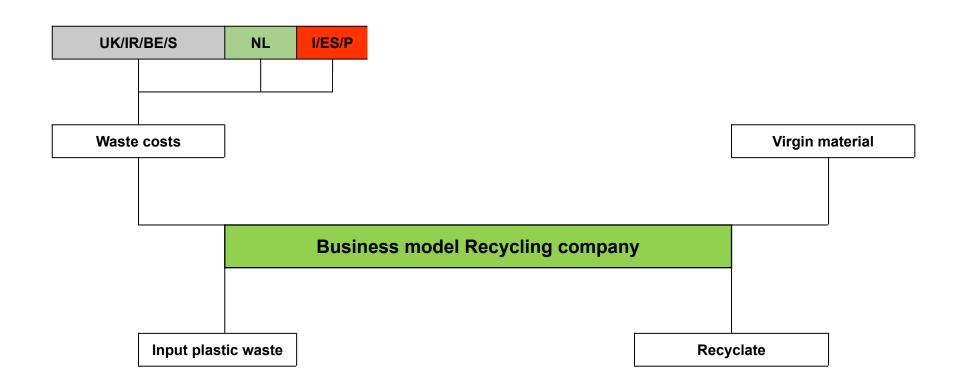


Achievability business model is depending on legislation.



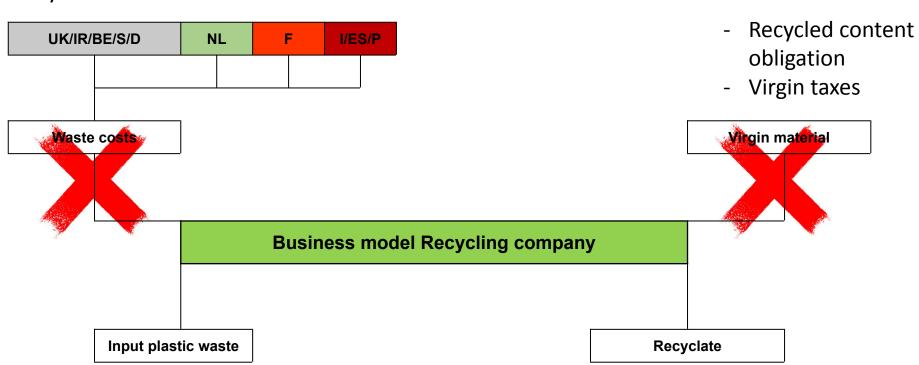


Achievability business model is depending on legislation.



# Next steps in the transition

Incineration ban recyclable waste



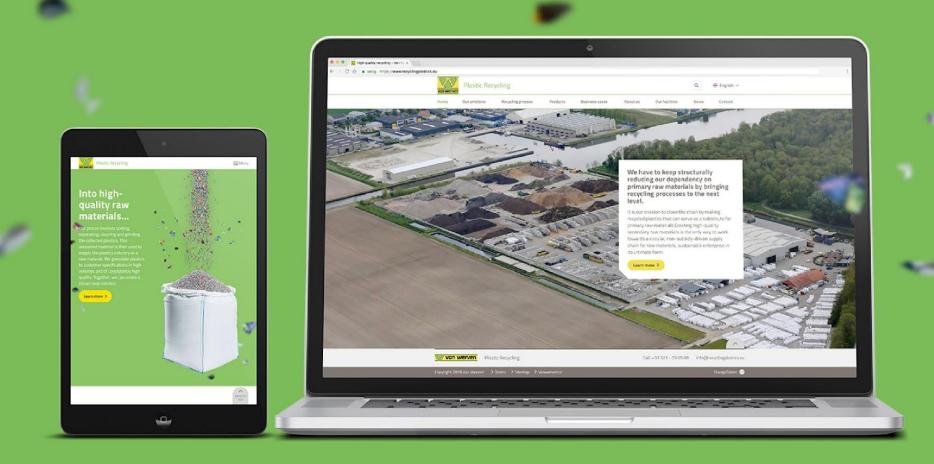
# CO<sup>2</sup> advantages

1 ton plastic waste brought to a mechanical recycling company saves the same CO<sup>2</sup> emissions as 1 electrical car in a year!





# recyclingplastics.eu



# Joe Hruska

**Vice President Environmental Affairs** 







# **Best Practices in Circular Approach Plastics**

Holland Circular Hotspot Webinar

Joe Hruska Vice President Environmental Affairs

**April 5, 2023** 



### **About Pathway Group**



Government Relations and public affairs are the cornerstones of our business. Since 2002, Pathway Group has helped to build effective win-win relationships between our clients and government.



#### **Overview**

- 1. Circular Economy Defined
- 2. Plastic Circularity by the Numbers
- 3. Best Practices One Size Does Not Fit All
- 4. Best Practices Supporting a More Circular Plastics Economy



#### **Circular Economy Defined – Many Definitions**

- No one clear definition but many have a common key principle that nothing is wasted and waste resources are kept in the economy.
- The Goal is zero waste and zero pollution
- Dependence on virgin materials reduced

#### **Government of Canada Circularity**

"In a circular economy, nothing is waste. The circular economy retains and recovers as much value as possible from resources by reusing, repairing, refurbishing, remanufacturing, repurposing, or recycling products and materials."

It's about using valuable resources wisely, thinking about waste as a resource instead of a cost, and finding innovative ways to better the environment and the economy."

Source: Circular Economy - Canada.ca



### **Circular Economy Defined**

#### Ellen McArthur Foundation

# The circular economy is based on three principles, driven by design.

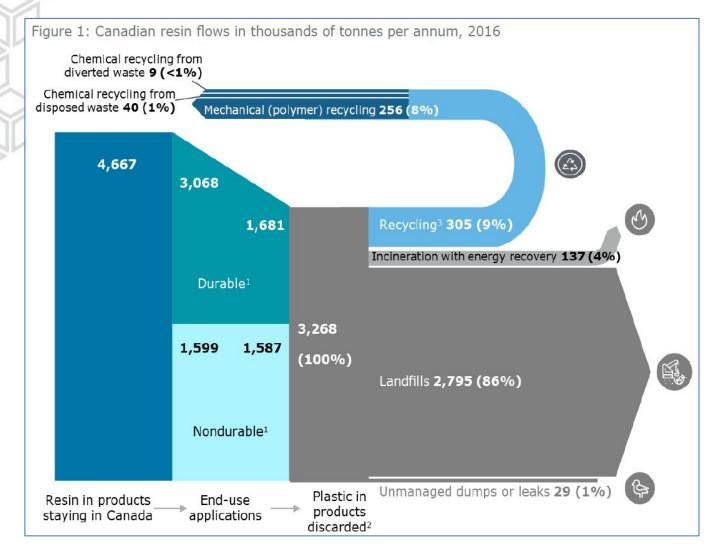
"A systems solution framework that tackles global challenges like climate change, biodiversity loss, waste, and pollution. It is based on three principles, driven by design: eliminate waste and pollution, circulate products and materials (at their highest value), and regenerate nature.

It is underpinned by a transition to renewable energy and materials. Transitioning to a circular economy entails decoupling economic activity from the consumption of finite resources. This represents a systemic shift that builds long-term resilience, generates business and economic opportunities, and provides environmental and societal benefits."

Source: Finding a common language — the circular economy glossary (ellenmacarthurfoundation.org)



# Plastic Circularity By The Numbers In Canada



Only 9% of all the plastics in were repurposed in our economy.

Means 91% of plastics in manufacturing were produced from virgin resources & resource extraction.

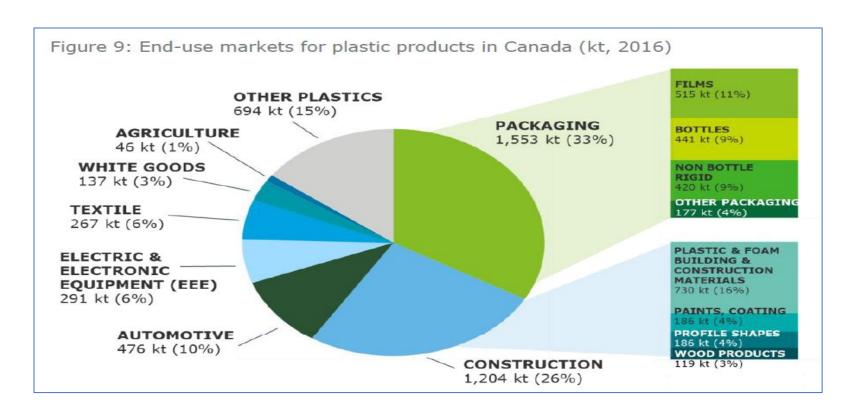
Closing the Circularity Gap and capturing the \$7.8 Billion plus in lost opportunity.

Global Circularity Gap 8.6%



#### **Best Practices – One Size Does Not Fit All**

- Every sector has specific needs and performance requirements.
- There are common principles and best practices, however sectors will prioritize their main needs and requirements.





### **Best Practice – Continuous Improvement**

- Making small incremental changes on products, processes and systems should be a goal of organizations
- Can identify need for new innovations that further improves performance and bottom-line in the Circular Economy
- Resulting benefits can be reduced costs, improved products and services
   more with less resources support Circular Economy goals



# Best Practice – Design to minimize waste throughout the entire supply chain

- Design for durability extend life of a product as much as possible then recycle
- Design for recycling will produce higher value feedstocks for Circular Economy
- Design for reuse intensifies the use of the product conserving resources and energy
- Design out material intensity
- Consider full life cycle impacts in the design of products, packaging and services –
   "Cannot rob Peter to pay Paul"
- Design with clear targets and goals



#### **Best Practices – Collaboration Is Critical**

- Building more efficient Circular Economy systems is a challenge for one organization to implement and execute.
- Through collaboration with partners, build a Circular Economy system that creates win-win opportunities throughout the whole supply chain
- Collaboration can help organizations access expertise otherwise not accessible to overcome barriers to creating Circular Economy systems such as technology and new innovations



#### **Best Practices – Scaling Up**

- Building scale to implement sustainable Circular Economy systems for sustainable systems.
- Scale provides efficiencies to finance new technologies and systems access to capital
- Example new advanced recycling systems where scale is required to be economically sustainable – organizations are collaborating to access consistent volumes of collected feedstocks and markets for the recycled product.



# **Best Practices – Government Policies That Are Supportive of Circularity for Plastics**

- Policies that incentivize investment in R&D, new innovation, recycle content and technology.
- Reduce uncertainty means not creating investment barriers such as the threat of bans, that would reduce feedstocks for mechanical, advanced recycling systems and manufacturers requiring consistent feedstock supplies for Circular Economy systems.
- Greater collaboration with plastics industry, recyclers, retail, brand owners, manufacturers and supply chains to create a win-win for government and industry that is mutually supportive of Circular Economy systems.
- Tax credits and accelerated depreciation policies that support organizations investing in Circular Economy systems.



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# Thank you for your attention!

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