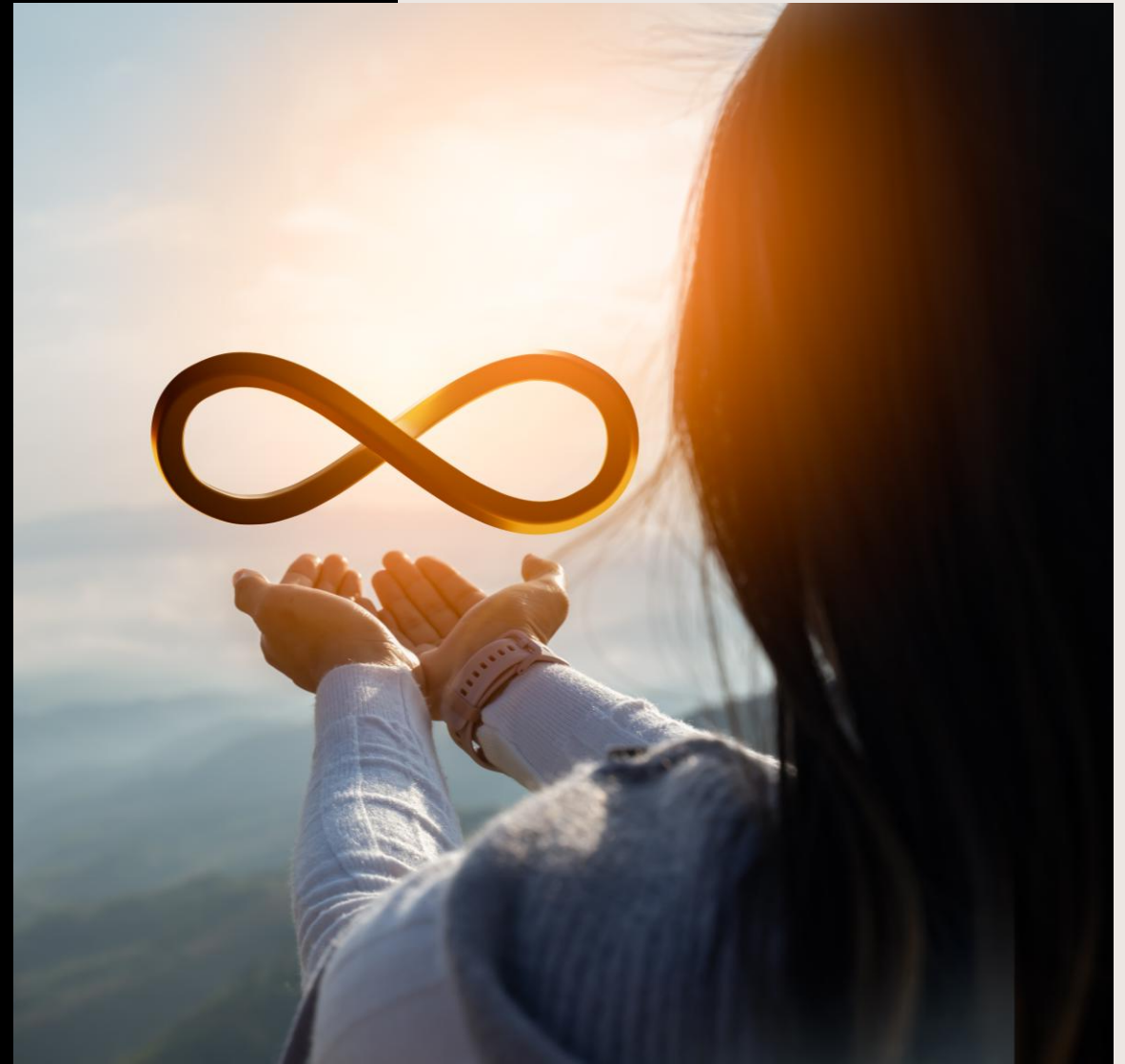
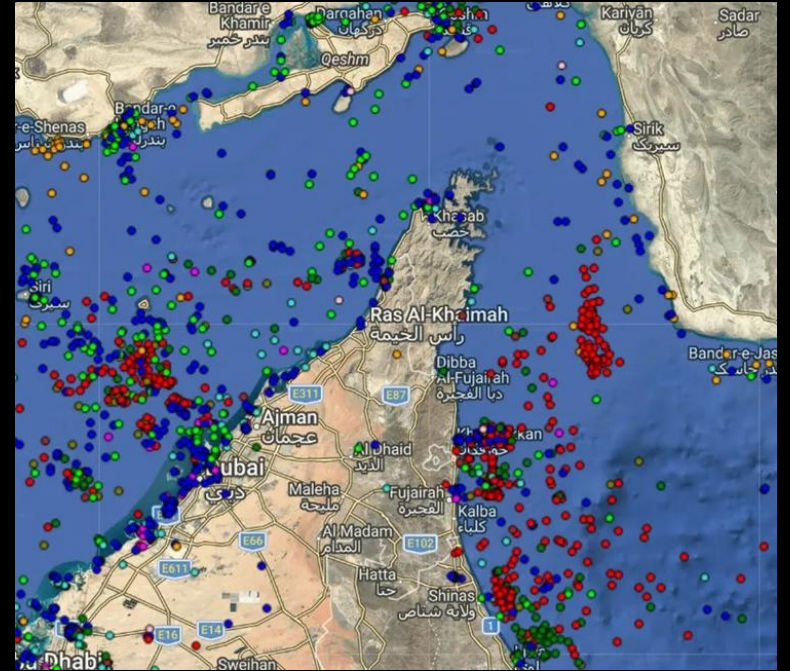


FROM LINEAR RISK TO CIRCULAR OPPORTUNITY

Rethinking Sustainability for
Competitive Advantage



*WE DO NOT SIMPLY FACE A
SUSTAINABILITY PROBLEM*



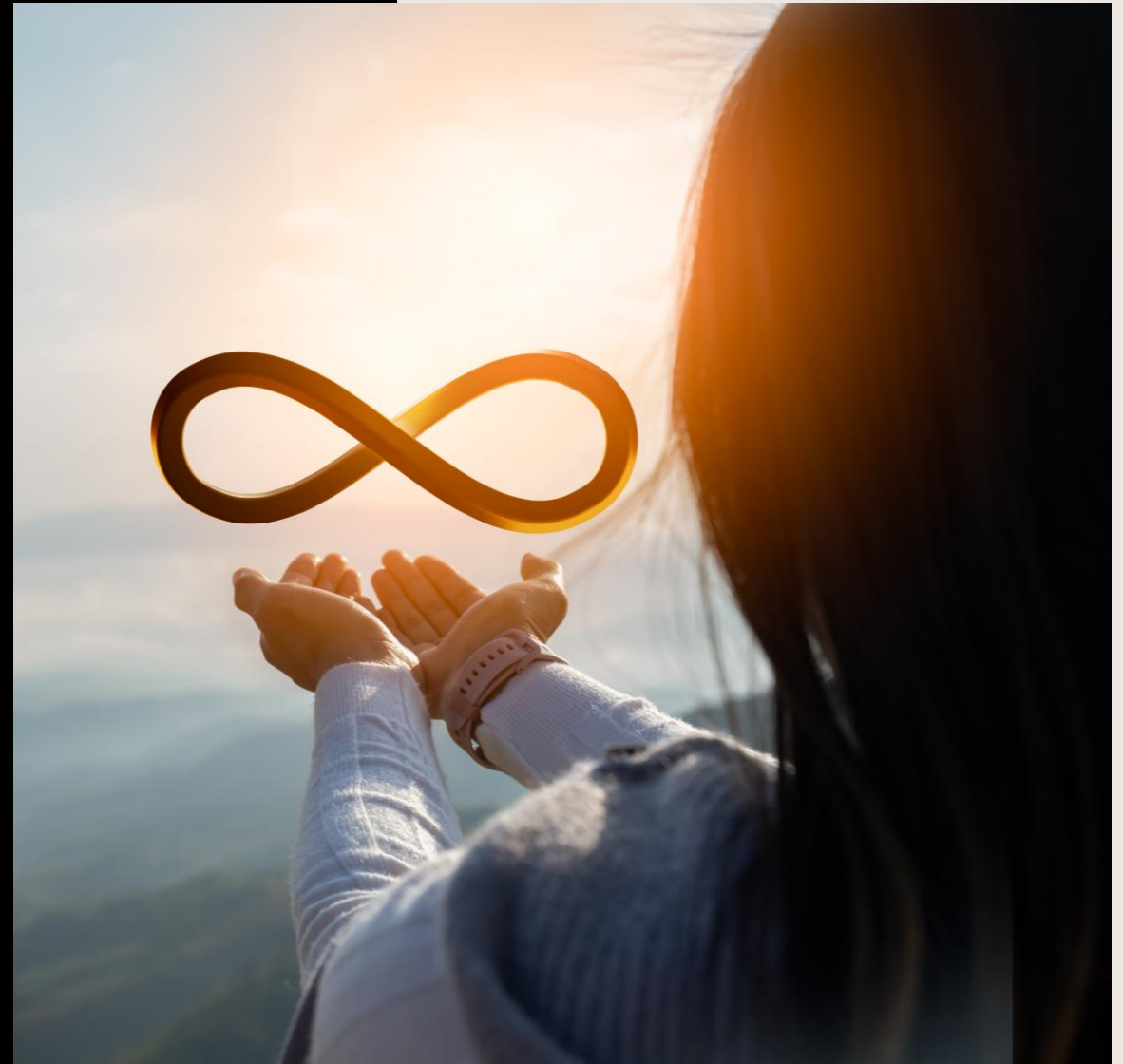
WE RELY
HEAVILY ON A
FUNCTIONING
GLOBALIZED
ECONOMY

- RARE EARTHS
- MATERIAL ACCESS
- ENERGY SUPPLY
- LABOUR COSTS
- GLOBAL TRADE
- TARIFFS
- ...



*WE NEED TO SECURE
EUROPE'S COMPETITIVENESS*

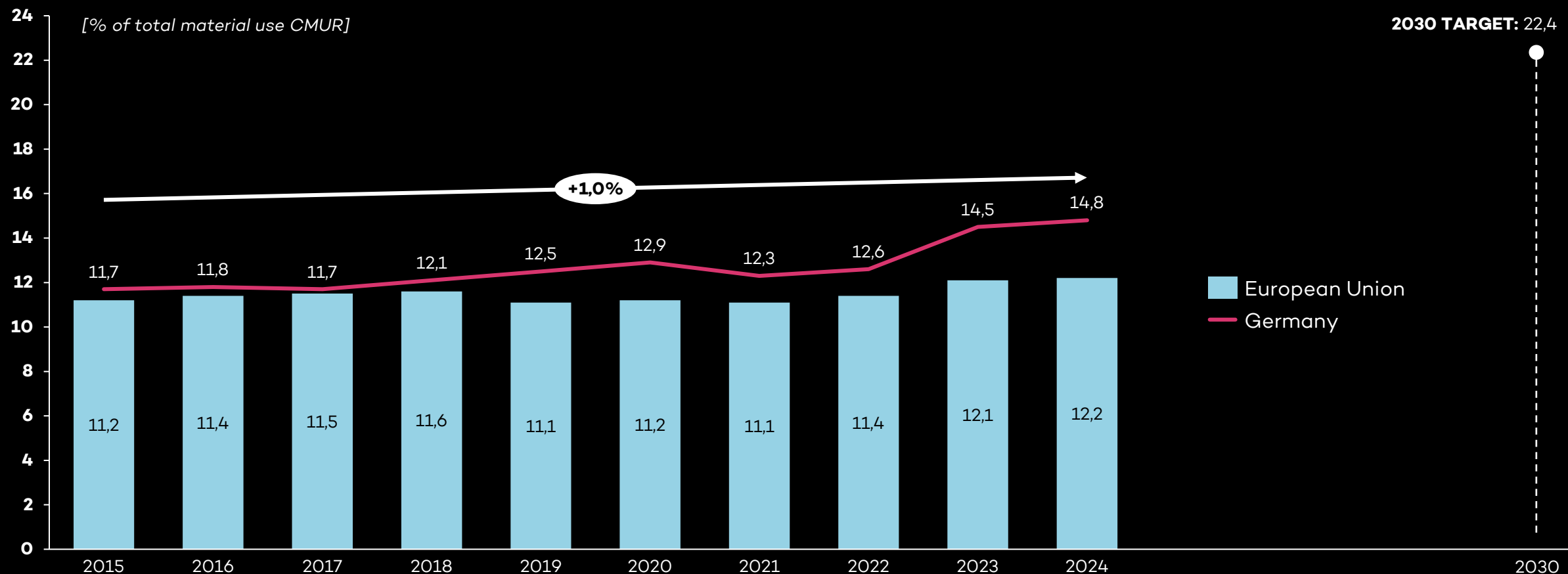
**CIRCULARITY
MAY BE THE
ANSWER TO
OUR CURRENT
CHALLENGES**



*ONLY 6.9%
OF 106BN TONNES
OF MATERIALS USED¹ COME
FROM RECYCLED SOURCES*

*THIS IS A
2.2 PERCENTAGE POINT DROP
SINCE 2015*

CIRCULARITY IS IMPROVING – BUT EUROPE IS NOT MOVING FAST ENOUGH



Source: EUROSTAT (November 2025) – Circular material use rate

CMUR = Circular material use rate

**BUT WHY THE
HELL IS HE
TELLING ME
ALL THIS?**





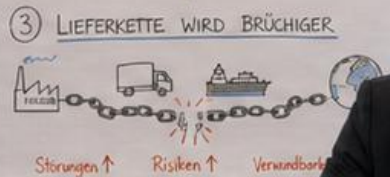
DREI GROSSE HERAUSFORDERUNGEN



STRATEGIE
RESILIENZ
ZUKUNFT



DREI GROSSE HERAUSFORDERUNGEN



ZUKUNFT
GESTALTEN
GEMEINSAM

KURZFRISTIGE EINSPARUNGEN

- Marketing
- Reisen
- Weiterbildung
- Externe Beratung
- Events

QUICK
WINS!

KOSTEN
RUNTER!

BUDGET

- Q2 +
- Q3 +
- Q4 +

CIRCULARITY ACTUALLY IS EUROPE'S NEXT **BUSINESS CASE**





Lorenz Meters shows how circular economy can become a lever for competitiveness.

Instead of entering a price race against low-cost disposable products, Lorenz builds on the durability of its water meters: products are taken back, refurbished and put back into use. This reduces material demand, cost pressure and exposure to volatile raw material prices — while helping the company keep production in Germany and build a strong position in smart metering.



Hilti shows how Product-as-a-Service can turn circularity into a recurring-revenues.

Instead of only selling tools, Hilti offers managed tool fleets for a fixed monthly fee, including service, repairs and replacement. This creates more predictable revenues, stronger customer relationships and control over product return flows — enabling reuse, refurbishment, spare-parts harvesting and recycling.



PALFINGER shows how refurbishment can unlock new market potential.

Instead of competing only on price with low-cost equipment from abroad, PALFINGER can extend the lifetime of its existing products through OEM-certified refurbishment. This creates a more affordable offering for customers while preserving quality, safety and brand trust — and helps defend market position through circularity rather than pure cost competition.



Material & component loop

Build the foundation for
circular flows:

Use of secondary raw materials
(e.g., recycled content)

Setup of collection, recycling,
and remanufacturing loops

Focus on material intensity and
CO₂ footprint



Design & lifecycle extension

Increase control over product
lifespan:

Implementation of modular
product designs

Simplified maintenance and
upgrades for products

Offering of refurbished or
reconditioned component



Business model innovation

Shift from product sales to
service-based value:

Rollout of leasing or pay-per-
use models

Development of PaaS (Product-
as-a-Service) concepts

Performance-based customer
relationships

THERE A FEW THINGS COMPANIES NEED TO UNDERSTAND BEFORE GETTING STARTED...



YOUR PRODUCT



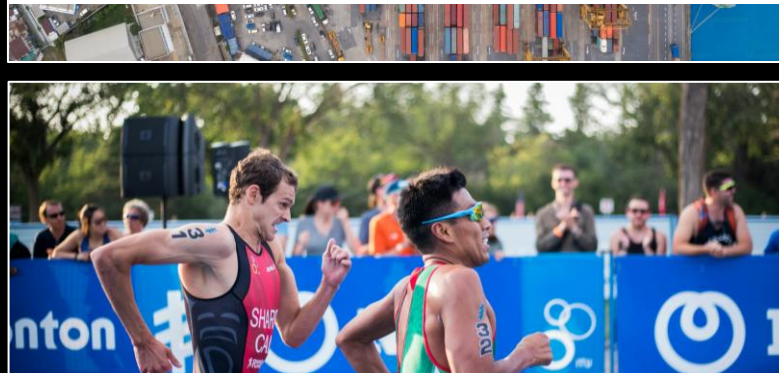
YOUR SUPPLY CHAIN



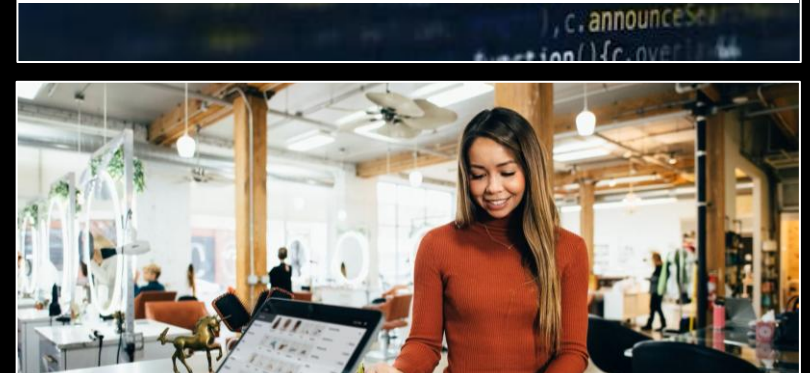
YOUR DATA



YOUR PRODUCTION



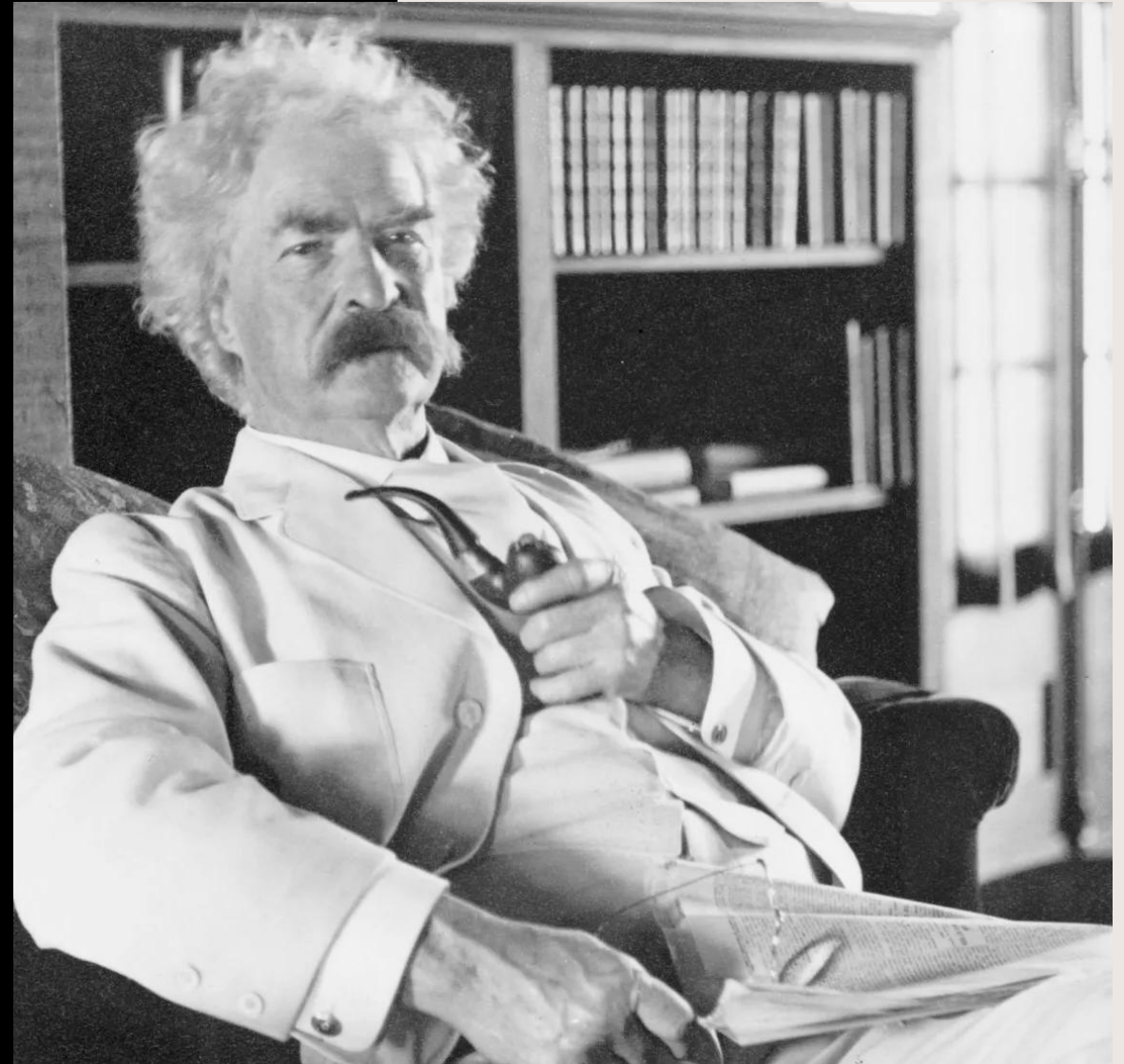
YOUR COMPETITION



YOUR CUSTOMER

THE SECRET OF GETTING AHEAD IS **GETTING STARTED**

Mark Twain
American writer, humorist, and essayist



LET'S CONNECT



H&Z Group companies |

