

Unpacking the 'Who Else' Campaign: Why Corrugated Cardboard Stands Out

The corrugated cardboard industry recycles the equivalent weight of around

2,600 EIFFEL TOWERS

each year*



WHO ELSE?

Transforming 26.4 million tonnes of recycled paper into new boxes (Source: FEFCO LCA 2021).

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Athens, May 2024

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EDITORIAL



As the newly elected President of FEFCO, it is a great honour to represent our members – corrugated manufacturers and their suppliers – and to contribute to our shared mission. This role is both humbling and challenging, and I am eager to collaborate with all of you to strengthen our industry's remarkable progress.

My election at the FEFCO Summit marked a pivotal moment. The event was a success, bringing together over 250 delegates to exchange knowledge and best practices. It demonstrated a strong willingness within the industry to connect, share and listen. The discussions highlighted the corrugated packaging sector's leadership in circularity, with the Packaging and Packaging Waste Regulation (PPWR) at its core. This regulation presents both challenges and opportunities. Now, more than ever, we must unite to build a sustainable future through tangible actions.

Climate neutrality remains a top priority. The industry has made significant strides in reducing energy use, as demonstrated during our recent energy efficiency workshop. But the journey continues – we must stay focused on decarbonising our own production processes while closely monitoring the progress of our suppliers, particularly in paper manufacturing, as their advancements are key to reducing the overall carbon footprint of our value chain.

Effective communication is vital to our success. Through coordinated efforts with EU affairs and national associations, we amplify the benefits of our industry to policy makers and stakeholders. By sharing our achievements and fostering transparency, we strengthen our position and build trust in the value of corrugated packaging.

The PPWR legislative process underscores the power of unity. As we move into its next phase, let us continue to stand strong in our advocacy, ensuring our collective voice is heard. Challenges lie ahead, but with cooperation as our strongest tool, we can achieve excellence.

Thank you for your trust. Let's keep working together for a sustainable future – for our industry, the planet and its people.

Nina Iversen
FEFCO President

FEFCO SUMMIT 2024

LEADING CIRCULARITY



Between 15 and 17 May, Athens was the setting for the FEFCO 2024 Summit, an unmissable gathering for the European corrugated cardboard industry. Over 250 participants from 20 countries united under the theme "Leading Circularity" to address the challenges and opportunities shaping the sector's future.



Nina Iversen, newly elected FEFCO President, Dr. Fady Gemayel, former President now Vice-President, Saverio Mayer, Vice President

Industry leaders, politicians and academics highlighted the importance of collaboration, decarbonisation and innovation across the supply chain to increase the industry's circularity and profitability.

A high-level conference

The Summit kicked off with a welcome reception hosted by FEFCO and HPPA (the Hellenic Paper and Packaging Association), who played a key role in the event's success by securing high-profile speakers and encouraging strong participation from local members.

On the first day, prominent speakers, including outgoing FEFCO President Dr Fady Gemayel and FEFCO Director General Eleni Despotou, emphasised the critical importance of the Packaging and Packaging Waste Regulation (PPWR) for the corrugated industry. Eleni Despotou called for close collaboration with policymakers and reminded the audience

that circularity and sustainability are integral to the corrugated sector's identity.

Vasilis Exarchos, President of the Hellenic Paper Packaging Association (HPPA), delivered an inspiring address, celebrating both the sector's historic achievements and its potential to adapt to a sustainable future.

Insights on regulation, sustainability and innovation

One of the highlights of the event was the panel discussion on how the PPWR could reshape the industry's future.

The panelists, highlighted the transformative potential of the new packaging regulations. Saverio Mayer, CEO of Smurfit Kappa Europe, emphasised continuous progress in packaging design, calling the regulations an opportunity to improve circularity and purpose. Alexander Enzenberg of



From left to right:
 Valerie Thys, moderator - Saverio Mayer, Smurfit Westrock - Alexander Enzenberg, Dunapack Packaging - Niel Osment, NOA Consulting - Alex Manisty, DSS - Franziska Decker, APPLIA

An update on FEFCO's communication strategy was presented by Philip Weiss and Jesús Azogue of ZN Consulting. They emphasised the need for the industry to lead in shaping public discourse and promoting sustainable solutions. With the newly elected MEPs, they suggested using the period after summer to highlight the benefits of our materials through a focused and engaging campaign.

The session concluded with a focus on marine litter, where Dimitris Alexopoulos from Enaleia, a Greek NGO dedicated to combating plastic pollution, shared his organisation's impactful efforts to clean up the oceans. He provided valuable insights into effective communication strategies to engage fishermen in this critical fight against plastic waste.

Looking ahead

FEFCO Director General Eleni Despotou closed the 2024 Summit with a call to unite in advancing circularity and sustainability, highlighting the sector's leadership in innovation and its collaborative efforts to tackle challenges and opportunities ahead.

FEFCO extends its thanks to all attendees, speakers and sponsors, including BOBST, Graco, Holmen, Fosber S.p.A. and Lino S.A., for making the event a resounding success.

Dunapack Packaging highlighted the value of optimising material efficiency and recyclability, noting that corrugated cardboard is not waste but a valuable secondary raw material capable of being recycled multiple times. Alex Manisty from DS Smith described the industry's focus on creating high-performance, lighter materials, viewing the PPWR as a catalyst for innovation and significant reductions in the average weight of corrugated cardboard.

These perspectives underline the industry's commitment to advancing sustainability and efficiency through continuous improvements.

The afternoon sessions focused on sustainability and energy efficiency, including the presentation of FEFCO's Best Practice Handbook. Participants also delved into environmental, social and governance (ESG) standards, aligning industry practices with the EU Green Deal.

A gala dinner at the iconic Acropolis Museum, sponsored by BOBST, concluded the first day, offering a relaxing moment for participants and a celebration of cultural heritage.

A significant milestone

The Summit marked a historic moment with the announcement of Nina Iversen, Managing Director of Glomma Papp AS Norway, as the new FEFCO President. Iversen, the first woman to hold this position since FEFCO's founding in 1952, succeeds Dr Fady Gemayel, who now serves as Honorary Vice-President.

Pioneering sustainability and technology

The second day began with a speech by Greek Minister of Development Konstantinos Skrekas, who underscored the eco-friendliness of paper and board packaging, emphasising the fact that corrugated is the most recycled packaging material. He also stressed the importance of political strategy in supporting the sector's sustainability efforts.

Artificial intelligence was a major focus, with Professor George Ioannou of the Athens University of Economics and Business outlining its potential to reduce waste, improve operational efficiency and meet sustainability goals. Cybersecurity is another key project of FEFCO and the Chair of the Cybersecurity task force presented the main achievements and deliverables planned in the coming months.



FEFCO delegates at the Acropolis museum



ENERGY EFFICIENCY WORKSHOP DRIVING DECARBONISATION IN THE CORRUGATED INDUSTRY

Following on from the publication of the Energy Efficiency Handbook for corrugated plants, FEFCO recently hosted an Energy Efficiency Workshop in Brussels.

113 participants from 20 countries joined us, including energy experts, regulatory specialists and sustainability advocates. Organised by the Operations and Innovation Committee (OIC), the event provided the best platform for discussing strategies to improve energy efficiency and to accelerate decarbonisation in corrugated cardboard manufacturing.

The workshop addressed critical industry challenges, such as aligning with evolving EU regulations, overcoming barriers to adopt advanced technologies, and meeting growing market demands for sustainable solutions. Attendees explored

opportunities to optimise operations, reduce energy consumption and help them in their transition towards climate-neutral practices by 2050 – a key objective for the corrugated sector.

Key Highlights from the Workshop

EU Regulation updates

Industry experts provided crucial insights into the regulatory landscape affecting the sector, underlining the urgency to adopt compliant and sustainable practices.

Technological advancements

Presenters showcased innovative energy-efficient technologies, emphasising their potential for reducing costs and boosting operational performance.

Mitigation measures

Many companies shared their progress in reducing energy consumption through targeted strategies aligned with internationally recognised frameworks

such as **the Science-Based Targets initiative (SBTi)**.

Data-driven improvements

Discussions revealed how advanced data analysis is enabling companies to identify and act on opportunities for greater sustainability in production.

While significant progress has been made, participants acknowledged persisting challenges, such as significant implementation costs, technical complexity, and the need to improve awareness of the benefits of energy efficiency among stakeholders. These hurdles underscore the importance of collaborative efforts within the industry.

In organising events like this, FEFCO's leadership demonstrates its commitment to support members in their journey towards net-zero. By fostering dialogue and sharing expertise, the workshop strengthened the corrugated industry's collective efforts to achieve sustainable growth.

FEFCO WORKSHOP

Implementing Energy Efficiency and Decarbonising Practices in Corrugated Manufacturing

24 October 2024

Sheraton hotel Brussels airport



Event sponsor

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BALDWIN

We would like to extend our sincere thanks to the members of the FEFCO Operations and Innovations Committee for their valuable input and the time dedicated to this event. Special recognition is owed to the Chair of the Committee, Marc Van Damme, whose leadership has been instrumental in driving this work forward. He was actively supported by Daniele Plazzi and Klaus Lüke who moderated

the event and the Question and Answers sessions. Finally, we would like to highlight the significant efforts of Michael Frey, who dedicated time and energy over the past year to bring the Best Practices Handbook for Improved Energy Efficiency to fruition. He also played a key role in assisting with the workshop programme, ensuring its success.

A special thank you goes to all the presenters who shared their invaluable knowledge and to the participants who contributed to this important discussion. Together, the industry continues to pave the way towards a greener future.



Morning speakers and moderators (left to right): Daniele Plazzi - OIC Member (FEPA), Michael Frey - MF Consultancy, Lars Komogowski - BHS Corrugated, Gianluca Berrettini - Fosber, Steve Parr - Smurfit Westrock, Giorgio Rivolta - no pollution, Roberto Baviera JR - Baviera



Afternoon Speakers and moderators (left to right): Patrick Klee - Openpack, Wilbert Streefland - Technology Coaching, John Stevenson - Glomma Papp, David Arnaud - BOBST, Carsten Holldack - Höcker Polytechnik, Jan-Oliver Hense - Crespel & Deiters, Stefan Schroeder - Crespel & Deiters, Marc Van Damme - OIC Chairman (VPK Group), Klaus Lüke - OIC Member (KlingeLe)



EU AFFAIRS UPDATE

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Packaging and Packaging Waste Regulation (PPWR)

With the European Parliament's approval and expected publication in early 2025, the European Packaging and Packaging Waste Regulation (PPWR) is poised to become a reality, marking a critical moment for the packaging industry. This is particularly true for the corrugated sector, where compliance will directly impact market access and competitiveness.

The PPWR will introduce stringent packaging design requirements, with implementation deadlines spanning from 2025 to 2030. Following its publication, the secondary legislation phase will begin, addressing technical details and focusing on key aspects such as:

- Recyclability and recycling design criteria
- Recyclability at scale
- Empty space ratio
- Packaging minimisation
- Labelling
- Substances of concern in packaging

FEFCO is committed to navigating these changes by balancing regulatory compliance with production and market realities. Advocating for standards that recognise the inherent recyclability of corrugated packaging, FEFCO promotes collaborative solutions to position the industry as a leader in Europe's transition to a circular economy.

As the PPWR progresses, FEFCO's proactive approach, including its PPWR

taskforce and coordination across the value chain, ensures that corrugated packaging remains competitive, sustainable and central to Europe's environmental ambitions.

European regulation on deforestation-free products

As the year draws to a close, the political landscape in Brussels is heating up with significant legislative developments. Central to these changes is the European Commission's proposal to amend the European Deforestation-Free Products Regulation (EUDR), postponing its application by one year, from 30 December 2024 to 30 December 2025.

If virgin materials are used in corrugated packaging, companies must provide detailed documentation proving their supply chains are deforestation-free. If adopted, the proposed one-year postponement would offer a valuable delay, giving businesses additional time to prepare for compliance. To support the sector, **FEFCO has launched a taskforce and is already developing practical guidance to ensure companies of all sizes are equipped to meet EUDR requirements** and uphold the industry's strong sustainability record.

A busy year ahead: other legislative challenges and opportunities

The year ahead promises to be decisive for the European industry, with significant legislative and political shifts on the horizon. While these changes bring

challenges, they also offer unique opportunities to reaffirm the corrugated sector's role as a leader in sustainability and innovation.

As 2025 approaches, the newly nominated European Commission is finalising its Work Programme for 2025, which may include initiatives like the **Competitiveness Compass and a Clean Industrial Deal**, aimed at closing innovation gaps, fostering decarbonisation and strengthening Europe's resilience.

The **Circular Economy Act**, building on the 2020 Circular Economy Action Plan, is expected to increase markets for secondary raw materials, streamline waste management, and drive demand for recycled materials. With its high recycling rates, the corrugated industry is well-positioned to benefit, provided it continues to innovate and meet evolving standards.

The **European Federation of Corrugated Board Manufacturers (FEFCO)** continues to play a vital role in guiding the industry through these changes. From providing compliance support for the EUDR to engaging with policymakers on upcoming initiatives, FEFCO ensures the sector's voice is heard and its contributions recognised.

2024 FEFCO CAMPAIGN

Following months of intense activity in 2023, centred on the Packaging and Packaging Waste Regulation (PPWR), FEFCO's communications highlighted the positive contribution corrugated cardboard makes to the supply chain and the potential challenges of a shift to reusable packaging.

As we moved into the second half of 2024, FEFCO's communication strategy returned to its core mission: showcasing the unmatched value that corrugated cardboard delivers.

The new campaign, entitled "Who else?" emphasises how corrugated cardboard uniquely combines efficiency and circularity. It highlights that corrugated

cardboard is not only renewable and recyclable but also one of the most recycled materials in Europe. With a visually compelling style and an engaging tagline, the campaign aims to capture attention, spark interest and drive engagement among our audiences and key players in the supply chain.

The campaign features a series of powerful visuals and texts that demonstrate how the sector keeps valuable materials in the loop through recycling. It provides concrete facts and figures, showcasing the scale of the corrugated cardboard industry, which creates thousands of local jobs across Europe - jobs that are rooted in the region and cannot be outsourced.

Furthermore, the campaign underscores how corrugated cardboard protects billions of goods on their journeys every year, ensuring that the supply chain moves efficiently and sustainably. Who else can deliver this?

Tools to engage with the campaign

FEFCO has developed several tools and platforms to help members and stakeholders actively participate in spreading the message:

- **Redesigned "Circular by Nature" landing page**

Explore the campaign materials, access additional resources and connect with value chain associations via the updated landing page: www.fefco.org/circular-by-nature.

- **FEFCO social media channels**

Stay connected on X (formerly Twitter), LinkedIn, Facebook and Instagram. Why follow? By liking, sharing and reposting FEFCO's posts, you amplify the campaign's visibility, ensuring its messages reach key decision-makers and industry stakeholders.

- **The New Monthly LinkedIn Newsletter**

Join almost 9,000 professionals who have already subscribed to FEFCO's LinkedIn newsletter. It serves as a hub for updates on packaging trends, industry news, events and FEFCO's main activities. If you haven't subscribed yet, don't miss out on this valuable resource!

- **Coming Soon: a promotional video for corrugated cardboard**

Early next year, FEFCO will launch an engaging video highlighting the key benefits and value of corrugated cardboard. This dynamic tool will complement the campaign by bringing its message to life in a format that resonates with diverse audiences.

Together, let's shine a spotlight on corrugated cardboard as the essential circular packaging solution for businesses and the environment. Who else?



FEFCO ACTIVITIES

FEFCO Board

SPP representative Pawel Rogalka, Digit Pack has been replaced by Tomasz Zebrowski, Stora Enso

New Sympathiser members

A big welcome to our new members who joined FEFCO in 2024!

Ensilio

www.ensilio.com

Switzerland

Kivanc Tekstil San. Ve Tic. A.Ş.

www.kivanctekstil.com.tr

Turkey

New Aerodinamica SRL

www.newaerodinamica.com

[newaerodinamica.com](http://www.newaerodinamica.com)

Italy

Cybersecurity project

In 2023, FEFCO launched the Cyber Security project workgroup, bringing together producers and suppliers to address growing cyber threats, develop industry-specific guidelines and raise awareness. Key outputs include a handbook and four annexes covering control point checklists, legacy systems, supplier declarations of conformity and guidelines for templates for mutual information security agreements.

The workgroup deliverables will be validated by Ernst & Young. Publication is planned in early 2025.



Statistics project

In 2023, FEFCO initiated a revamp of its statistical database to improve industry data management and analysis, focusing on performance monitoring, industry dashboards and advocacy support. Achievements include establishing protocols for monthly data collection and evaluation. Yearly reporting saw improvements in content, format, data consistency, visualisations and source clarity. Legal compliance was strengthened through members' declarations to mitigate antitrust risks.

FEFCO plans to improve data accuracy and timeliness by encouraging member-driven estimations for missing data, reducing reporting delays and improving trend analysis. Expanded coverage will include data from non-FEFCO members in Europe. Regulatory compliance will remain a priority. Also, the development of a user-friendly database cockpit with real-time dashboards and analytics tools will provide stakeholders with actionable insights.

FEFCO Technical Seminar

Registration will be open before the end of January 2025.

www.fefco.org/feeco-technical-seminar-2025.

Other Events

Paris Packaging Week

28-29 January 2025

Paris Expo Porte de Versailles

www.parispackagingweek.com

Fruit Logistica

5-7 February 2025

Berlin, Germany

www.fruitlogistica.com

Cosmopack

20-22 March 2025

Bologna, Italy

www.cosmoprof.com

Ecommerce packaging & Labelling Expo

25-26 February 2025

Excel London, UK

www.ecommercepackagingexpo.co.uk



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