



**FEFCO**  
Corrugated Packaging

**2023**

# **ACTIVITY REPORT**



# CONTENTS

Foreword	4
About FEFCO	6
Key production statistics	7
Corrugated in numbers	8
Building on the FEFCO Strategy since 2021	10
2023 Projects	12
Committee work	15
Health & Safety Committee	16
Regulatory Affairs Committee	17
Communications Committee	20
Operations & Innovation Committee	23
National Directors Committee	24
Statistics Committee	25
FEFCO governance	26
Cooperation and network	28



# FOREWORD





**Eleni Despotou**  
Director General

### Another year of progress

Reflecting on the past year, we are proud to present the 2023 Activity Report of the European Federation of Corrugated Cardboard Manufacturers (FEFCO). This year showcased our industry's resilience and commitment to sustainability, highlighting our ability to adapt and thrive in a dynamic environment.

### Advocating for the industry and its future

In 2023, FEFCO actively engaged in policy advocacy, notably influencing the Packaging and Packaging Waste Regulation. Our efforts resulted in corrugated cardboard being exempted from mandatory reuse targets for transport, e-commerce and sales packaging. This success underscores the sustainability and essential role corrugated materials play in logistics and retail, thanks to their versatility and recyclability.

Our advocacy has strengthened the industry's reputation as a responsible and forward-thinking stakeholder. By engaging with policymakers and industry partners, FEFCO has amplified our industry's voice and reinforced our commitment to support and advance the sector.

### Leaders in sustainability and circularity

Sustainability remains a cornerstone of FEFCO's mission. In 2023, we continued our path towards a circular economy. A major initiative was the development of a Carbon Assessment Tool and a Handbook on Best Practices for Energy Efficiency. These resources provide members with strategies to lower carbon emissions and improve energy efficiency.

### Showcasing innovation: Technical Seminar highlights

The bi-annual FEFCO Technical Seminar in Lyon was a major success, highlighting industry advancements in digital printing, smart packaging, eco-friendly materials and new production processes. The seminar underscored the dynamic nature of our industry and its pursuit of excellence. The collaborative efforts showcased have led to tools and technologies that enhance product quality, reduce environmental impact and improve supply chain efficiency.

### Improving data quality: Statistics Project launch

Recognising the importance of reliable data, FEFCO launched a new Statistics Project to improve the accuracy and reliability of industry statistics. This project aims to improve our ability to monitor trends, understand market dynamics and support our advocacy with robust data.

### Looking ahead: a vision for the future

Building on the successes of 2023, together, we are well equipped to navigate future challenges and seize opportunities. Our vision is for the corrugated cardboard industry to lead in delivering sustainable, high-quality packaging solutions.

### Acknowledgments

We are grateful to all members, partners and stakeholders for their dedication and collaboration. Your support has been crucial to our success. We look forward to building on our achievements and continuing our pursuit of excellence.



**Fady Gemayel**  
FEFCO President

2023 was a very busy year for FEFCO. The whole team and board were active on several levels. Decarbonisation, statistics, the FEFCO code, energy

efficiency, safety and - probably our biggest challenge of all - the Packaging and Packaging Waste Regulation, (PPWR), kept us fully occupied. Indeed, PPWR represented the most existential threat to our industry in many years. The idea started when the EU commission was looking for ways to reduce packaging waste by promoting reuse. While we all agree on and work towards reducing waste, the proposal was a conceptual framework, leading to exactly the opposite result, which is promoting plastics! And conversely, reducing plastic is one of the European Commission's objectives. Furthermore, the conceptual solution would create unprecedented disruption to logistics. Indeed, we picked up on the early signals of a move in this direction as Spain and Germany had already begun considering these measures.

When the Commission was ready to address the subject, FEFCO was ready with scientific evidence to show the unquestionable advantages of Corrugated. We asserted that our product does in fact reuse the same fibre, because up to 89% of packaging is made from recycled material recovered from old boxes. Furthermore, the remaining balance comes from renewable resources. Although this is fact and reality, the reuse argument was not accepted because of deontology. FEFCO had to then fight hard in developing studies to show the intrinsic advantages of corrugated particularly in terms of carbon impact on the environment.

Since this watershed moment, our Vice Presidents, Board members, Committee Chairs, the Team and I have channelled all our efforts into addressing this issue. We are very happy to report that ultimately the European Parliament passed the proper framework which reflects the intrinsic advantages of corrugated. We are delighted that we will continue to serve the interests of society and the logistical chain for many years to come.

United we addressed this tremendous challenge and united we remain in our continued efforts towards decarbonisation. Corrugated packaging will then be totally in line with environmental regulations not only as a product, but as a production process as well.

Although we are one hundred sixty-six years young we look forward to the future with confidence and passion, putting commitment and innovation at the heart of serving citizens and future generations.

I look forward to celebrating many more years of full service to our industry.





# ABOUT FEFCO

FEFCO is a pan-European association of corrugated manufacturers and represents the interests of the industry. FEFCO addresses a wide range of issues, from technical to economic, ensuring that members are continuously informed about developments that may affect the corrugated-packaging industry.

## MEMBERS – BRIEF OVERVIEW

---

FEFCO brings together 17 National Associations (active members), 21 Corresponding members (corrugated board producers in countries where there is no national association) and 193 Sympathiser members (suppliers to the industry).

### **Austria**

Austrian Corrugated Industry Association, Austrian Paper and Cardboard Trade Association  
President: Mr. Alexander Enzenberg  
Secretary General: Mr. Alfred Bartosch

### **Benelux**

Corrugated Benelux Association (CBA)  
President: Mr. Dirk Ockerman  
Secretary, Belgium: Ms. Lieve Vanlierde  
Secretary, Netherlands: Mr. Peter van Ostaijen

### **Croatia**

Association of Croatian Corrugated Board Producers (UHPVK)  
President: Mr. Zvonimir Culjak  
Secretary General: Ms. Ana Soldo

### **Czech Republic**

Association of Czech Corrugated Board Producers (SVVL)  
President/Secretary General: Mr. Walo Hinterberger

### **Finland**

Finnish Corrugated Board Association (FCBA)  
Secretary General: Ms. Eija Jokela  
President: Mr. Ari Viinikkala

### **France**

Carton Ondulé de France (COF)  
President: Mr. Philippe Durand  
Secretary General: Ms. Kareen Desbouis

### **Germany**

German Corrugated Board Association (VDW)  
President: Dr. Steffen Würth  
Secretary General: Dr. Oliver Wolfrum

### **Greece**

Hellenic Paper Packaging Association (HPPA)  
President: Mr. Vasileios Exarchos  
Secretary General: Ms. Iphigenia Tarou

### **Hungary**

Hungarian Federation of Corrugated Board Manufacturers (HFCEM)  
President/Secretary General: Mr. Dennis Belkovsky

### **Italy**

Italian Group of Corrugated Cardboard Manufacturers (GIFCO)  
President: Mr. Fausto Ferretti  
Secretary General: Mr. Fabio Panetta

### **Poland**

Association of Polish Papermakers (SPP)  
Vice-President: Mr. Pawel Rogalka  
General Director: Mr. Janusz Turski

### **Portugal**

National Association of Paper and Cardboard Industries (ANIPC)  
President: Mr. Inácio Carvalho Alves Ferreira  
Secretary General: Mr. Pedro Conceição

### **Romania**

Romanian Association of Corrugated Cardboard Manufacturers (ROMPAP)  
President: Mr. Paul-Henri Kohler  
Executive Director: Mr. Cosmin Alexandru

### **Spain**

Spanish Association of Manufacturers of Corrugated Cardboard Containers and Packaging (AFCO)  
President: Mr. Leopoldo Santorromán  
Secretary General: Mr. Ignacio Carro

### **Sweden**

Swedish Corrugated Cardboard Association (SWIF)  
President: Mr. Anders Isaksson  
Managing Director: Ms. Eva Glückman

### **United Kingdom**

Confederation of Paper Industries Ltd. (CPI)  
President: Mr. Stewart Begg  
Director Packaging Affairs: Mr. Andrew Barnetson  
Director of Packaging: Mr. Phil Fenton  
Executive Director – Sustainable Products: Ms. Dimitra Rappou

## CORRESPONDING MEMBERS

---

FEFCO has 21 Corresponding members from 16 countries. Corresponding membership is open to companies located in a country that does not have a National Association member.

## SYMPATHISER MEMBERS

---

FEFCO has 193 Sympathiser members from 28 countries, including 18 new members that joined us in 2023.

Membership is open to companies supplying the corrugated industry.

# KEY PRODUCTION STATISTICS 2023



- Total shipments in millions of m<sup>2</sup> (including non-members) 2023
- Total number of corrugating plants (including non-members) 2023
- Average weight of board in g/m<sup>2</sup> (including non-members) 2023

KEY FACTS

# CORRUGATED IN NUMBERS (FEFCO 2023 Statistics)



Production

**46.7** billion m<sup>2</sup>

of corrugated board is almost enough to cover the area of Denmark.



More than

**40%**

of corrugated packaging is used to package food products.



Corrugated packs and protects more than

**75%**

of European goods.



**88%**

of corrugated packaging is derived from recycled content.



Corrugated cardboard recycling rate exceeds

**90%**



Corrugated board is biodegradable and compostable.



Companies

**258**



Plants

**536**



Workforce

**71 500**

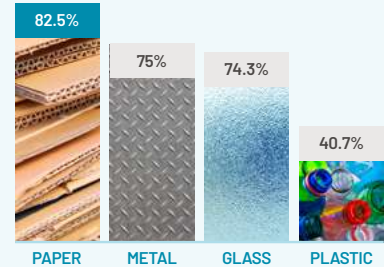
**Used corrugated stays in the loop and is a valuable resource. A packaging material that benefits the planet, society and the economy**

## CIRCULAR BY NATURE

Corrugated cardboard embodies circularity and sustainability. The circular economy is central for the transition to a sustainable and climate-friendly future and for achieving the Green Deal ambition. Both climate neutrality and the preservation of natural resources should support the competitiveness of the European economy.

At the core of cardboard is recycling, which takes place every day in every country in Europe. Recycling gives valuable materials like paper and board a long lifespan. The circular economy relies on recycling, waste prevention and the use of recovered fibre to keep materials in the loop and minimise resource use. The recycling rate for cardboard exceeds 90%, and on average, 88% of the material used in new production is derived from recycled content (source: FEFCO LCA 2021).

**Paper and Board is the most recycled packaging material.**



Data source: Eurostat 2021

## CORRUGATED CARDBOARD - A SAFE AND HYGIENIC CHOICE

The industry continues to innovate to ensure sustainable, safe and hygienic packaging for the future. Corrugated packaging is hygienic, extends the shelf life of fruits and vegetable and reduces food waste.

Microbiological contamination of fruit and vegetables is a major concern for retailers: pathogen bacteria can put food safety at risk while spoilage bacteria impact shelf life. With reusable transport packaging for B2B, there are concerns about the risk of product damage and contamination in the logistics chain.

During the manufacturing process of corrugated, the material itself reaches 100°C at least three times during the production process, ensuring the elimination of microbes and bacteria. This greatly reduces the risk of the packaging altering or contaminating fresh produce.





## THE INDUSTRY HAS LONG SUPPORTED SUSTAINABLE FOREST MANAGEMENT PRACTICES, DRIVING EUROPE'S FOREST GROWTH



- The European paper industry strongly relies on forest certification, in particular FSC and PEFC: 73% of wood and 90% of market pulp come from forest management certified sources.
- 90% of the wood used by the industry is sourced from European Union forests.
- Land covered by forests in Europe has increased by 59,000km<sup>2</sup> in the past 15 years. (reference: State of Europe's Forests 2020). In 2020, the EU had an estimated 160 million hectares of forest (excluding other wooded land). In relative terms, this means that forests cover around 40% of EU land area
- One third of the EU's annual forest growth is not harvested
- When a tree is harvested, the carbon is no longer stored in the forest but remains in the packaging produced, such as paper or corrugated cardboard packaging (reference: Food and Agriculture Organization 2021)

### Sources:

#### CEPI

- The forest – our call to life
  - Forest Resources
- [cepi.org/forest-resources](https://cepi.org/forest-resources)

#### Green Source

- Responsible products start with a green source
- [eugreensource.org/media-library](https://eugreensource.org/media-library)



## A POSITIVE CONTRIBUTOR TO SOCIETY

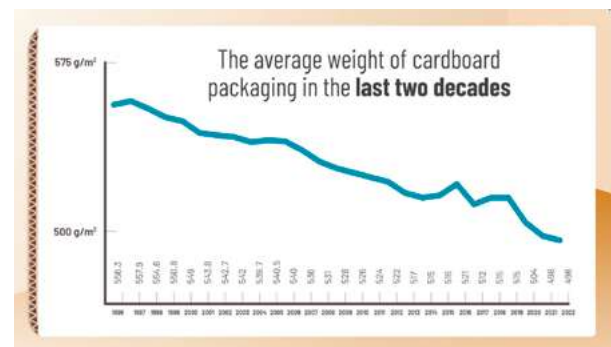
Corrugated cardboard packaging plays a pivotal role in our everyday life. In Europe, the corrugated sector directly employs approximately 100,000 people and supports an additional 270,000 in indirect roles across the continent. Moreover, taking into account jobs throughout the entire supply chain, this number quadruples. Corrugated cardboard plants are deeply embedded in local communities across Europe, providing stable, local employment that cannot be outsourced. Why? Because cardboard is produced locally, near its point of use and because transporting empty boxes over long distances is inefficient due to their low weight but high volume. This results in trucks quickly filling up with essentially "air". Thus, corrugated cardboard packaging is an intrinsic European product serving European society.

**Good for the economy:** The industry generates approximately €50 bn a year in turnover across Europe. Significant amounts are then reinvested into the communities, supporting research and innovation, and contributing substantially to national and local revenue through taxation.

**Corrugated cardboard is bio-based and made from renewable resources:** Corrugated cardboard uses mainly recovered (recycled) fibres and for a small part by-products from the wood industry and virgin fibres from responsibly managed forests. This minimises the environmental impact corrugated has on resources. Corrugated cardboard is easy to collect and recycle, ensuring these valuable fibres are used again and again!

## REDUCTION IN THE AVERAGE WEIGHT OF CORRUGATED

When packaging is lighter, less material is used. The corrugated cardboard industry has made significant efforts to reduce the average paper and board basis weight, while maintaining the same strength and durability of the material.



Source: FEFCO annual statistics



# BUILDING ON THE FEFCO STRATEGY SINCE 2021

## STRATEGIC VISION - FEFCO IS THE LEADING VOICE OF THE CORRUGATED INDUSTRY IN EUROPE

FEFCO is the reference voice for the corrugated cardboard industry aiming to inform, promote and support the industry in Europe. Its target is to be ranked amongst the most credible and effective associations in Brussels, while promoting corrugated as the privileged packaging solution.

FEFCO's ultimate goal is to ensure a favourable regulatory framework in Europe to allow its members to operate efficiently and effectively.

## FEFCO'S CORE ACTIVITIES

- Represent the European corrugated industry at the European institutions and other relevant stakeholders
- Promote the benefits of corrugated in line with its strategy - corrugated cardboard is a recyclable, renewable, sustainable, bio-based product respecting the Green Deal principles and aiming to reach carbon neutrality by 2050
- Offer and develop expertise on policy, technical and scientific topics relevant to the industry
- Spread best practice in various areas e.g. Health and Safety
- Generate intelligence related to technical matters useful to its members
- Provide information and service to members by collecting and disseminating valuable industry information within the sector and to relevant stakeholders
- Share experience and knowledge at events such as the Technical Seminar, the Summit, technical workshops and policy events.

By focusing on these strategic areas, FEFCO ensures that the corrugated industry remains at the forefront of regulatory compliance and sustainability, thus reinforcing its position as a key player in Europe's packaging sector.

FEFCO, the Board and its members meet every September to discuss and align the action plan for the following year and agree on a draft budget. The association's activities are conditioned by the EU regulatory environment and its potential impact on the corrugated industry. Furthermore, continuous monitoring, agility and vigilance are required to cope with legislative complexity.

Since its publication in November 2022, the Packaging and Packaging Waste Regulation (PPWR) has been at the centre of FEFCO's priorities as it will define the rules allowing companies to operate across the markets in the coming years.



**In 2023, FEFCO effectively advocated for a balanced and realistic packaging regulation. The coordinated efforts between our advocacy and communication committees have been key in developing and conveying clear messages that reflect our priorities. The active involvement of our members has significantly contributed to these positive results, demonstrating the strength of our inclusive approach.**

*Eleni Despotou*  
FEFCO Director General

## PRIORITIES AND OBJECTIVES 2023

Based on the strategy defined in 2021, and in view of the recent EU regulatory developments related to the PPWD(R) revision, FEFCO updated its objectives for 2023:

### Enable a favourable regulatory environment to allow companies to operate.

- Intensify its advocacy and political communication on the Packaging and Packaging Waste Regulation (PPWR) to defend corrugated packaging as a packaging solution that is complementary to reuse
- FEFCO constantly adjusted its advocacy priorities related to the PPWR
- In addition, FEFCO was also involved in:
  - Eco-design for Sustainable Products Regulation (ESPR)
  - Green claims
  - Food safety legislation (chemical substances, PFAS, Mineral oil etc.)
  - Promoting a level playing field for packaging solutions in FEFCO positions

### Support its member associations in their local objectives when relevant and upon request e.g. national, regional reuse targets, mineral oil, technical matters and promotion

### Guide its members towards compliance with Green Deal requirements, and provide tools to accompany them in their climate neutrality journey

- Provide an overview of the Climate Neutrality Roadmap with visual elements for impactful communication



© European Union 2023 - Source: EP

- Finalise the FEFCO carbon assessment tool to support members in creating their own carbon footprint, roadmap and Science Based Targets Initiative (SBTi) submission using a common approach.
- Initiate the implementation of guidelines on energy efficiency best practices for corrugated cardboard manufacturing, aligning with FEFCO's Climate Neutrality Roadmap 2050.

### Gather information and technical intelligence

- Studies on various relevant subjects, e.g. biodegradability and impact of reuse for the supply chain
- Policy monitoring
- Statistics gathering
- Life cycle assessment (LCA) on tri-annual basis
- Technical seminar including industry suppliers

### Promote corrugated as a sustainable packaging solution and efficient packaging for the supply chain, complementary to reuse

- Intensify social media campaigns, PR outreach and media plan
- Align and adjust communication on PPWR with national associations and members
- Organise events to support advocacy when needed
- Disseminate knowledge and information to members via thematic webinars and participation in conferences



# 2023 PROJECTS

## PACKAGING AND PACKAGING WASTE REGULATION (PPWR)

The publication of the Packaging and Packaging Waste Directive revision text in November 2022 determined FEFCO's activities for the following two years, and will continue until the end of the legislative process. Specific initial provisions related to mandatory reuse targets for packaging posed an unprecedented threat for the corrugated cardboard industry. FEFCO mobilised its members and the necessary resources to develop a robust advocacy strategy together with a coordinated communication plan with concrete actions in Brussels and most EU countries.

### ACTIVITIES 2023

Building on the momentum of 2022, PPWR has been the absolute priority for 2023. The Secretariat, along with its

member associations and companies, has maintained a concerted effort to mitigate the potential adverse effects of this regulation. Additional science-based peer reviewed case studies demonstrating the environmental profile of cardboard have complemented the toolkit of arguments.

To maximise coordination, the Secretariat developed comprehensive advocacy and communication toolkits for its members. These toolkits provide essential resources, including talking points, briefing materials and templates, designed to support members' interactions with policymakers and clients. They are crafted to equip members with effective strategies and guidance to leverage their advocacy efforts.

In practical terms, cardboard boxes have been exempted from the mandatory reuse targets for transport packaging including e-commerce, sales and grouped packaging. Furthermore, coordination with the value chain has been instrumental in this success. The

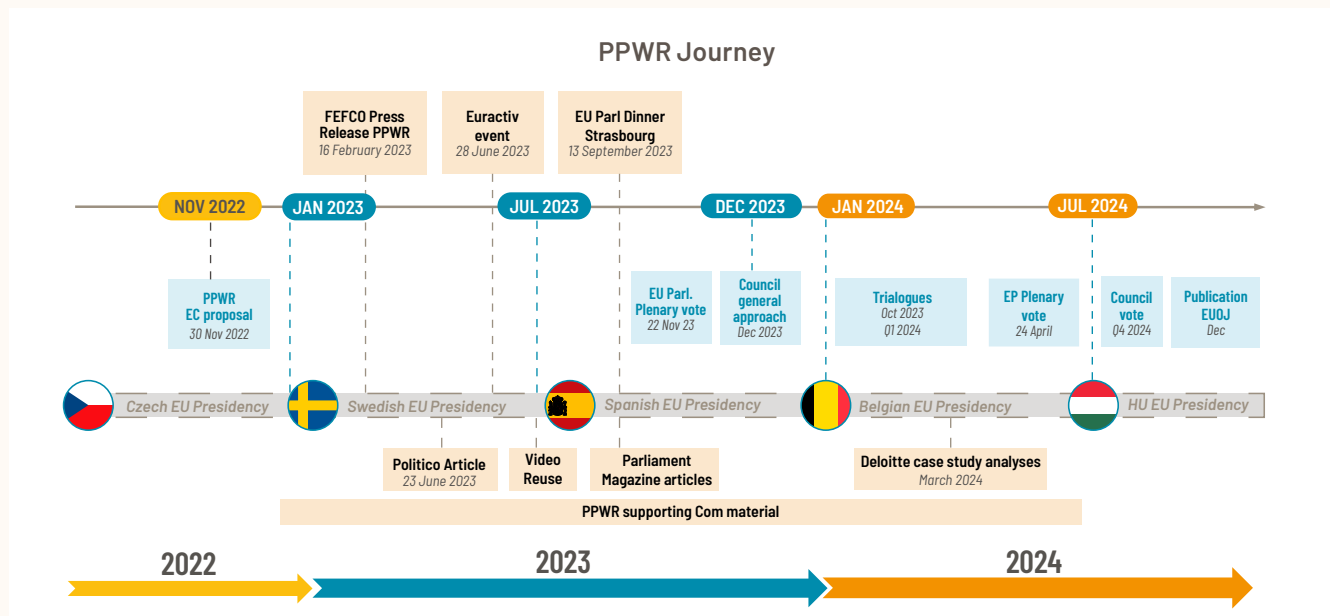
support of industry experts coupled with the alignment and approval of our positions and tactics by the Board have contributed significantly to the joint efforts and successes during the legislative process.

The road to achieving favourable conditions for our industry has not been easy. This shared challenge has not only deepened our collaboration and fostered solidarity but has also played a big role in achieving success in our collective initiatives.



© European Union 2023 - Source: EP

Frédérique Ries, EP Rapporteur PPWR



## FEFCO Carbon Assessment Tool

This project is an implementing measure in the Climate Neutrality Roadmap that was developed and launched in 2022.

The FEFCO Carbon Assessment Tool is designed to support members in developing their own roadmap towards net zero emissions. It assists companies in calculating their carbon footprint and provides the initial quantitative foundation for constructing a science-based targets initiative (SBTi) compliant roadmap. It is primarily for use by experts in carbon accounting.

The tool can calculate the carbon footprint of up to 20 plants. Its calculation differs according to the scope. The tool provides two methodologies with different uses and audiences:

- The CITPA methodology mainly considers emissions related to the production of the end-product. This methodology provides the user with a PCF (Product Carbon Footprint). It can be used to communicate the carbon impact of a product to consumers or buyers.
- The SBTi methodology considers emissions from daily activities that are not necessarily related to the production process, such as lighting, employee commuting and travel. This methodology provides the user with a CCF (Corporate Carbon Footprint). It is needed if a plant wishes to be SBTi compliant.

In 2023, the tool was refined to effectively accommodate the diverse and complex needs of our members. As a result, it now proposes standardised units and has adopted a level of granularity that corresponds with most members' experiences. This was possible thanks to the comprehensive work done for the [FEFCO Climate roadmap](#).



After the release of the first version and testing by the expert workgroup, recent improvements have increased its usability and functionality:

- Technical improvement to increase computation speed
- “One-click refresh” function with simplified data updates
- Detailed explanations with comprehensive guidance in both the manual and the excel tool
- Simplification of some elements to reduce error potential when manipulating the tool, especially in unit management
- Adaptation of compliancy to new SBTi requirements
- Improved accuracy through issue resolution

This tool offers members a balanced blend of practicality and precision, facilitating reliable and standardised carbon accounting.

In 2024, work on the tool will continue to increase its usability and improvements will be implemented on an ongoing basis.

## FEFCO TECHNICAL SEMINAR

FEFCO's Technical Seminar took place 25 - 27 October 2023 in Lyon at the Congress Centre. It brought together 1,150 representatives from Europe's corrugated board industry, setting a new attendance record, overtaking previous FEFCO events in Copenhagen (2021) and Geneva (2019). On the exhibition floor a total of 165 stands and 110 exhibitors from 41 countries showcased their products and services.

The theme of the seminar was **“Shaping our future through innovation”** and addressed the challenges facing the industry as it recovers from post-COVID disruptions while striving to become smarter and greener.

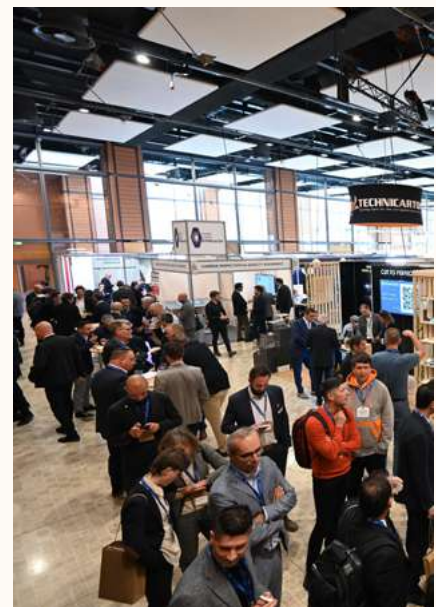
At the opening of the event, FEFCO President, Dr Fady Gemayel emphasised that the corrugated industry is already aligned with the EU Green Deal objectives. He stated, “Our product has proven to be essential to the well-being of the economy and for society. It has demonstrated its unique role in the distribution value chain. Corrugated cardboard is recyclable and recycled everyday”. This Technical Seminar gathered dynamic representatives from the corrugated sector, including

suppliers, customers and industry technical experts. They debated how artificial intelligence and digitalisation can transform manufacturing processes, improve supply chain management and overall efficiency. The conference featured specific sessions on energy efficiency and reduction, light paper grammages, artificial intelligence (AI), digital printing, logistics flows, bio-based coatings, cybersecurity and EU legislation. For more interactivity, the programme included four panel discussions with leaders and experts from the industry and the sector.

The event concluded with the highly anticipated award ceremony where seven prizes were presented to members who excelled during the spotlight session. FEFCO Operations and Innovation Committee Chairman Marc Van Damme noted that awards highlighted the corrugated cardboard industry's commitment to sustainability. "The innovations and ideas that we have seen are proof that corrugated is smarter, greener and more creative than ever."

In concluding this successful Technical Seminar, FEFCO's Director General Eleni Despotou said that the outcome of the presentations and discussions at the

event demonstrated that the corrugated cardboard sector is fit for the future. "Our world faces challenges as we move to become more sustainable while continuing to improve customer service and excellence. We are developing smart and sustainable packaging solutions that can adapt to these changing demands and help make the planet more sustainable."





# COMMITTEE WORK



# HEALTH & SAFETY COMMITTEE



In March 2023, FEFCO welcomed **Andrew Braund**, CPI Director of Health and Safety, as the new chair of the Health & Safety Committee. Andrew succeeded Sabine Nellen, Mondi, who chaired the committee in 2022.



In November 2023, **John Nicholls**, Vice President Health & Safety Europe for Smurfit Kappa took over the committee chair.

## BRAINSTORMING SESSION TO IMPROVE MACHINE SAFETY

In February 2023 the Health & Safety Committee and the Operations & Innovations Committee put their heads together in a brainstorming session. The purpose was to discuss possible steps that the industry can take to improve machine safety and compliance with European directives. Progress continues on these topics.

## GETTING MORE INVOLVED IN MACHINE SAFETY STANDARDS

With the ambition of improving machine safety and compliance with European Directives, the Health & Safety Committee aims to be actively involved in national machine safety standard committees, by having representatives in these committees. The committee also intends to have representatives in the European Committee for Standardization (CEN) and the International Organization for Standardization (ISO) as there is currently limited participation by the corrugated industry.

main aim was to increase awareness of the committee and to encourage health and safety representatives from all member companies to become members.

## STORA ENSO/DE JONG PLANT VISIT IN DE LIER, NETHERLANDS

In November, members of the Health & Safety Committee were welcomed by De Jong/Stora Enso to their corrugated packaging site in De Lier, the Netherlands. They were shown how sustainability and health and safety are implemented.



## SAFETY ALERTS

FEFCO continues to share Safety Alerts with members and to make them available on the website in the members area.

## PRESENTATION OF THE H&S COMMITTEE AT THE TECHNICAL SEMINAR

John Nicholls presented an overview of the activities of the Health & Safety Committee at the FEFCO Technical Seminar in Lyon in October 2023. The

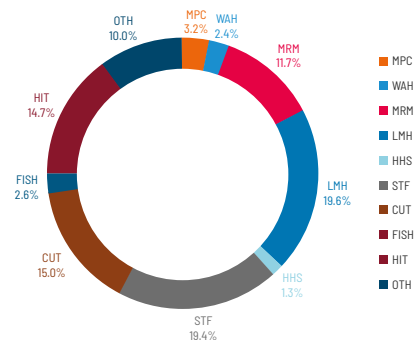
## SAFETY STATISTICS

We collected the safety statistics for calendar year 2022 based on injury data and shared this overview with FEFCO members. The statistics are split into two parts: companies with more than 10 plants and companies with less than 10. The committee also collected data on accident categories. An overview of the most recurrent categories for 2022 was also included in the overview.

### Legend

MPC	Mobile plant or vehicle	STF	Slip, trip, fall
WAH	Work at height	CUT	Cuts related to knives and sharp tools
MRM	Moving rotating machinery	FISH	Fire safety and heat burns
LMH	Lifting and manual handling	HIT	Hit by something fixed or stationary
HHS	Handling/controlling hazardous substances	OTH	Others

### Incident Causation 2022





# REGULATORY AFFAIRS COMMITTEE

## FEFCO PRIORITIES

Policy priorities were classified by level of importance based on their potential impact on the business and probability to occur. In 2023, the top priorities were:

- EU Packaging and Packaging Waste Regulation (PPWR) new provision and exemptions
- Food contact materials
- Sustainability projects

FEFCO has continued and increased its advocacy on the review of the Packaging and Packaging Waste Regulation.

While this legislation has become the number one priority for the industry, FEFCO has continued to follow other key files, including the Eco-Design for Sustainable Products Regulation, Green Claims Directive, revision of the Waste Framework Directive, Deforestation and Forest Degradation Regulation, developments under the Chemical Strategy for Sustainability, Mineral oils and Printing inks.

## SUSTAINABILITY AND CIRCULAR ECONOMY

### Packaging and Packaging Waste Regulation (PPWR)

The PPWR remains FEFCO's top priority. The proposal was officially published on 30 November 2022. Intense advocacy from FEFCO and its members succeeded in securing substantial exemptions for corrugated cardboard packaging in the Commission's proposal, securing markets for transport including e-commerce, sales and grouped packaging but also punnets for fruits and vegetables of less than 1.5 kg. The legislative process took the entire year, going through the European Parliament and Council for approval.

FEFCO, together with its National Association members and companies, activated their networks at EU and national level to enable a successful outcome. FEFCO provided and updated an advocacy toolkit with key messages and amendments to support the joint advocacy efforts and it continued to update members on the legislative process.

### FEFCO studies on recycling and reuse

The aim of these studies was to support PPWR advocacy and to evaluate the impact that the PPWR's reuse targets for selected markets would have on corrugated cardboard and the supply chain from an environmental perspective.

### Supply chain case study analyses (Deloitte)

On behalf of FEFCO, Deloitte conducted a study to examine the potential impact of replacing corrugated cardboard with reusable packaging, focusing on logistical aspects, such as transport and storage, as well as environmental impact. The analysis builds on two case studies related to grouped packaging for biscuits and heavy furniture kits. These case studies highlighted the significant impact of a potential regulation that forced the market to shift from corrugated cardboard to reusable crates.



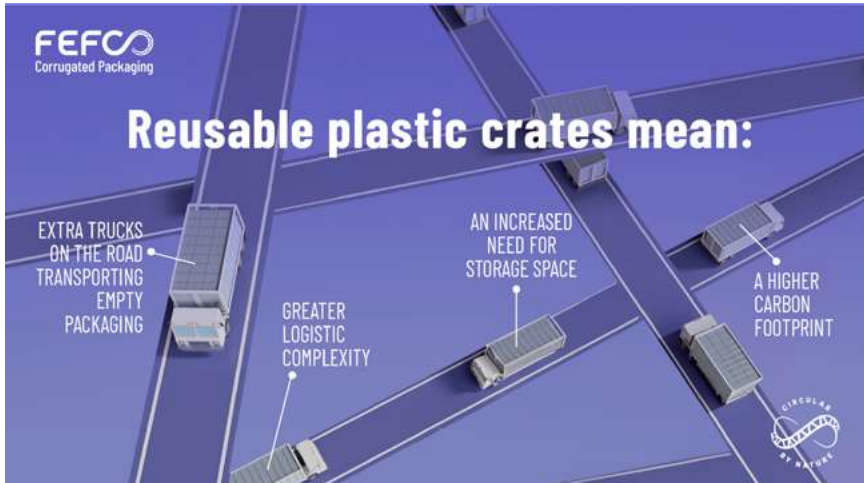
**“2023 was a busy year for the Regulatory Affairs Committee, as negotiations on the Packaging and Packaging Waste Regulation, dominated the committee's activities.**

**The committee has played a pivotal role in supporting FEFCO advocacy both at national and European level. Thanks to the expertise and proactiveness of its members, the committee has not lost track of other relevant regulatory files such as the revision of the Food Contact Material Regulation, the new Ecodesign for Sustainable Products Regulation and the European Deforestation Regulation.”**



Marcello Pezzi – Chair, Regulatory Affairs Committee (RAC)





### Impact Assessment of reuse targets in proposed PPWR (McKinsey)

A report on the possible impact of the EU packaging regulation where the economic, environmental and societal impact of applying the 2030 targets in PPWR were investigated. McKinsey was commissioned by Cepi, ECMA, EPPA, FEFCO and Pro Carton to examine two use cases. The first focused on shifting partly from single-use packaging and the second on the reuse solution. The report found that imposing mandatory reuse packaging targets by 2030 and inspirational targets by 2040 would severely impact both the EU's environmental footprint and the competitiveness and resilience of the European economy.

A visual summary of the findings was prepared and is available on the FEFCO website in the News section April 2023, as well as the full report.

### Directive for Substantiating Green Claims

The Commission published its proposal for a Directive to substantiate green claims on 30 March 2023. The proposal was delayed several times and was presented as a complementary legislation to the file on empowering consumers towards a green transition. The scope covers the substantiation and communication of voluntary environmental claims and environmental

labelling in B2C commercial practices. FEFCO provided a response to the public consultation (Environmental performance of products and businesses – substantiating claims – europa.eu).

### Revision of the Waste Framework Directive

The revision of the Waste Framework Directive, focusing on textiles and food waste, was published on 5 July 2023. FEFCO replied to the public consultation (Environmental impact of waste management – revision of EU waste framework – europa.eu) despite the fact that packaging is not yet included.

### Eco-design for Sustainable Products Regulation

The European Parliament adopted its position on 12 July 2023. MEPs voted to strengthen measures proposed by the Commission to ensure longer product lifespans and better-informed consumers.

The Commission had previously published a public consultation (New product priorities for Ecodesign for Sustainable Products – europa.eu) to determine priority product groups and horizontal measures to be addressed by the ESPR, to which FEFCO provided a response in May 2023.

### Regulation on Deforestation and Forest Degradation

The EU Regulation on deforestation was published in the EU Official Journal on 9 June 2023 and entered into force on 29 June 2023. The main obligations will be applicable in December 2024.

Producers and traders of certain commodities and products have to conduct extensive due diligence before putting those products on the EU market. Wood is one of the commodities listed together with many derived products listed in the annex to the regulation (e.g., wood products, pulp and paper, printed books). It is important to check carefully which products are covered, with reference to the product's tariff classification under the Combined Nomenclature.

### PRODUCT SAFETY

#### Revision of the Food Contact Materials Regulation

The European Commission published a public consultation on the revision of EU rules on Food Contact Materials. FEFCO provided a response. EY (Ernest & Young) was appointed by the European Commission to conduct a survey regarding food contact. FEFCO provided a response to the questionnaire following internal consultation with members. DG SANTE (health and food safety) would circulate a "discussion document" addressing stakeholders' questions.

#### Use of BPA and other bisphenols in food contact materials and articles

In 2023, the European Food Safety Authority (the Authority) issued an updated opinion on Bisphenol A. Based on new scientific data, the Authority concluded that this substance has several adverse effects, including an impact on the immune system. The European Commission will launch a consultation on the matter in 2024.

## Restriction on per- and polyfluoroalkyl substances (PFAS)

A proposal to ban the manufacture, use and placing on the market of at least 10,000 PFAS was submitted to the European Chemicals Agency (ECHA) by Germany, Denmark, the Netherlands, Sweden and Norway. ECHA put forward a proposal that this should only apply to intentionally added substances.

## Chemical Strategy for Sustainability

The revision of the Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH) has been postponed.

## Biodegradability of corrugated (VTT)

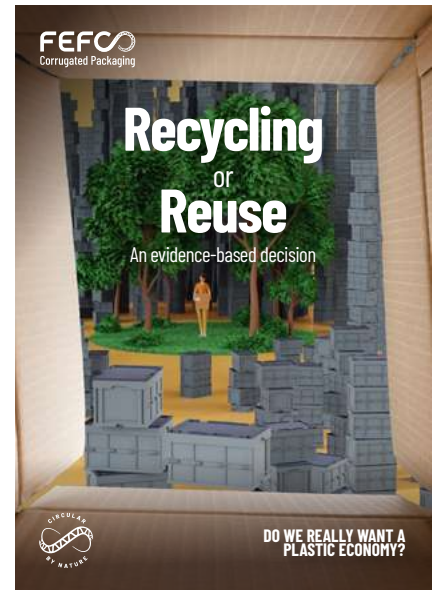
The Project to test the biodegradability of corrugated started at the Technical Research Centre of Finland (VTT). Testing was initiated at the end of September 2023 with first results expected after 6 months.

## Mineral Oils

In December 2022, the German Federal Council (German Bundesrat) decided not to approve the Mineral Oil Ordinance. As a result, the Ordinance will not come into force. In 2023, EFSA started a scientific opinion on the risk assessment of MOH (Mineral Oil Hydrocarbons) in food with a public consultation in April 2023.

## Revision of ISO 4046 – vocabulary for Pulp, Paper and Board

A revision of ISO 4046, providing a vocabulary for Pulp, Paper and Board has begun, led by PROPAKMA. FEFCO is supporting the work alongside other paper and board associations. This gives us the opportunity to provide comments and suggestions for the review of the standard. FEFCO provides regular feedback from the discussions and members can send comments on definitions to the FEFCO secretariat.



### FEFCO position papers 2023

- FEFCO supports the review of the FCM legislation
- FEFCO position on PPWR 2023
- FEFCO feedback on the European Commission's upcoming review of the Packaging and Packaging Waste Regulation
- Joint Industry Statement on Reuse

### Joint positions with Fibre Packaging Europe (FPE)

- Packaging & Packaging Waste Regulation – Art 22 Annex V 5b bans
- Position of Fibre Packaging Europe on the proposal for a Packaging and Packaging Waste Regulation (PPWR)
- Concrete measures to boost packaging recycling across Europe



# COMMUNICATIONS COMMITTEE

In 2023, our foremost priority was to support our advocacy initiatives through strategic messaging, and to ensure our communication efforts were meticulously aligned with the FEFCO PPWR advocacy strategy. The second key file was the promotion of the Climate Neutrality Roadmap published at the end of 2022, with the development of a software tool for members as a follow-up project.

## MAIN ACHIEVEMENTS OF 2023

### PPWR Communication materials

FEFCO created a series of communications assets dedicated to promoting FEFCO key policy asks with regards to the **Packaging and Packaging Waste Regulation (PPWR)**. These were used in various social media channels.

### Video on the unintended consequences of reuse

Despite its initial good intentions, PPWR could have unintended consequences in its quest to promote reuse. Replacing recyclable cardboard with reusable crates would increase the environmental impact of packaging and goes completely against the spirit of the EU Green Deal. FEFCO

prepared a video to dive deep into this issue and explore potential involuntary consequences of mandatory reuse targets.

FEFCO also developed additional communications materials featuring excerpts from the video and highlighting specific challenges associated with the shift to reusable packaging. These challenges include the increased need for standardisation, logistical complexity, more empty space in transport packaging and the necessity of cleaning reusable packaging.

In 2023 FEFCO expanded the **EU Policy pages** of its website and also developed a specific section called PPWR media. It contained all the related communications materials and the video on reuse.

### Events

**Euractiv event - 28 June 2023 - FEFCO: PPWR - how can we make it work?** You can watch the full event via this [Youtube link](#) or by going to the Events page of the Euractiv website and searching the event name.

The event was well attended, online and physically, reaching an audience of around 900 participants. 2,700 people also viewed the event page. The impressions online via Euractiv channels reached more 13,000, not including FEFCO's own online activation of posts and reposts.

It provided an excellent opportunity to reaffirm the corrugated sector's



commitment to circularity, but also to present its positions while collaborating with key EU stakeholders to ensure the success of the PPWR. Eleni Despotou reiterated the industry's stance on 'fit for purpose' packaging and the importance of cardboard exemptions in key markets, emphasising its high recycling rates.

During the debate, FEFCO showed its commitment to promoting environmentally responsible packaging practices that align with the EU's sustainability goals.

### EU Parliament Dinner, 13 September, 2023 - European Parliament Strasbourg

Organised by the Parliament Magazine and sponsored by FEFCO.

The event titled "PPWR: Recycling and Reuse as complementary solutions", was kindly hosted by MEP Massimiliano Salini.

The debate centred around the benefits of corrugated packaging, emphasising the complementarity of recycling and reuse in packaging. Eliminating one in favour of the other would have significant environmental and economic





repercussions, affecting jobs in Europe and compromising the EU Green Deal's success. Attendees highlighted that cardboard is already highly circular, with a recycling rate of over 90% and new material containing 89% recycled content. MEP Sean Kelly noted that circularity is a current European principle. The discussion also exposed the overlooked side effects of PPWR and the rise of plastic production and waste. MEP Salini argued against switching from cardboard to plastic. FEFCO members reiterated their commitment to reducing packaging waste and achieving the EU's 2050 climate neutrality targets.

### Press / media work

#### FEFCO PPWR related Press releases:

- 16 February 2023 - Reuse targets rely primarily on fossil-based resources and disregard renewable materials
- 23 Nov 2023 - PPWR – EU Parliament strikes a balance for circular packaging



Fady Gemayel, FEFCO President



Saverio Mayer, FEFCO Vice President

#### Other FEFCO press releases

- October 2023 - Corrugated packaging gets smarter and greener at FEFCO's Lyon Technical Seminar
- October 2023 - Corrugated packaging industry awards innovations at FEFCO's Lyon Technical Seminar

#### Politico article

23 June 2023 - Plastic economy: the unintended consequence of reuse targets. The text coming from the Council of the European Union led by Spain on the EU's Packaging and Packaging Waste Regulation on reuse targets notably for transport packaging favour plastic by default, while penalising recyclable materials like cardboard.

#### Articles in the Parliament Magazine

- June 2023: Recycling and re-use must be treated equally if a truly circular economy is to be achieved
- 31 August 2023 - The key role of corrugated cardboard in delivering a stronger circular economy



President with MEP Inese Vaidere and Nina Iversen (Vice President)



MEP Massimiliano Salini

In 2023, FEFCO sponsored the **Packaging & Packaging Waste** section of the Euractiv website (a major EU news reporter in Brussels) and was regularly quoted in articles related to PPWR.

#### Articles – FEFCO members

The fruitful media cooperation between FEFCO, National Associations and member companies enables a flow of effective and positive news in the various national and European media: newspapers, television and social media. FEFCO, the National Associations and some corrugated companies published articles in leading national newspapers and online news portals. As a consequence, the voice of the corrugated industry is well heard at regional, national and European level.

- Politico article – 22 November 2023 “Proposed mandatory reuse rules jeopardizing world's best recycling system” by SKG.
- Media outreach across Europe, the National Associations as well as FEFCO intensified their use of media assets to warn key stakeholders about what's at stake if corrugated cardboard is substituted by reusable packaging all over Europe.
- FEFCO gathered all the press articles in a pdf (available on the website) including coverage in European media such as the Irish Times, Het Financieele Dagblad, Sustainable packaging news, Packaging News UK and Circular online.

#### Articles with Fibre Packaging Europe coalition

- Parliament magazine - 29 June 2023 “Policy choices that aim at reducing environmental harm should be based on sound scientific evaluation using harmonised methods”
- Euractiv – 21 June 2023 “Paper and Board Recycling IS High-Quality Recycling” (ACE, CEPI, FEFCO)

**FPE coalition study** (McKinsey – April 2023) concluded that imposing strict reusable packaging targets by 2030 will severely impact the EU's environmental footprint and the competitiveness and resilience of the European economy.



## FEFCO Communication activity related to the Climate Neutrality Roadmap

Following the launch of the FEFCO Climate Neutrality Roadmap in November 2022, a new visual document providing an overview of the results of the Roadmap was produced in February 2023. FEFCO produced a set of visuals which have been used for broader dissemination on FEFCO media channels and by members.

All the documents, the executive summary and the visual overview are available for download on the FEFCO website.

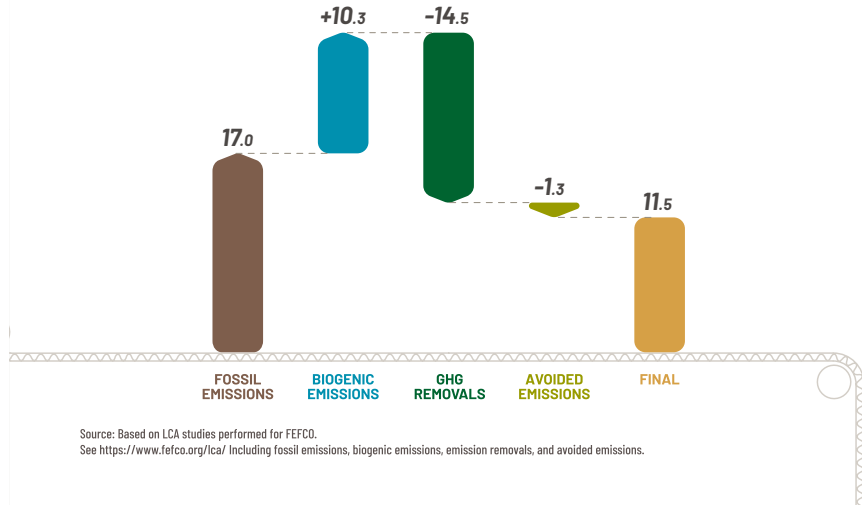


**“The industry supports the objectives of the Green Deal and the new packaging legislation. Recycling and reuse should both contribute to packaging circularity and complement each other. Reuse systems should be applied where they are most beneficial for the environment, economy and society. Setting mandatory reuse targets risks disproportionately benefiting specific materials rather than achieving a balanced approach. This principle has been a key focus of our communication campaign in 2023.”**

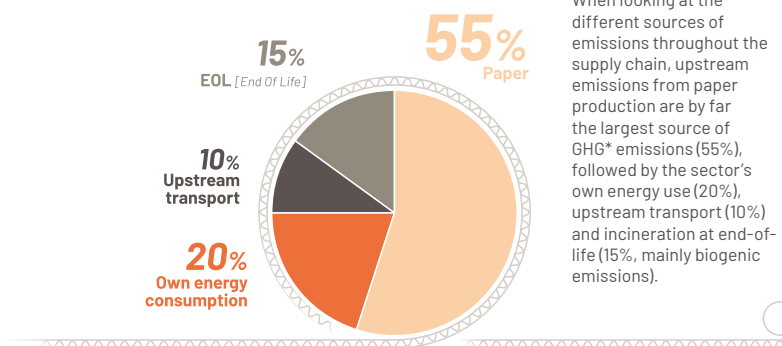


*Alex Manisty, Chair of the Communications Committee and the Climate Neutrality workgroup*

IN 2020, THE SECTOR-WIDE FOOTPRINT WAS 11.5 MT OF CO<sub>2</sub><sub>EO</sub>

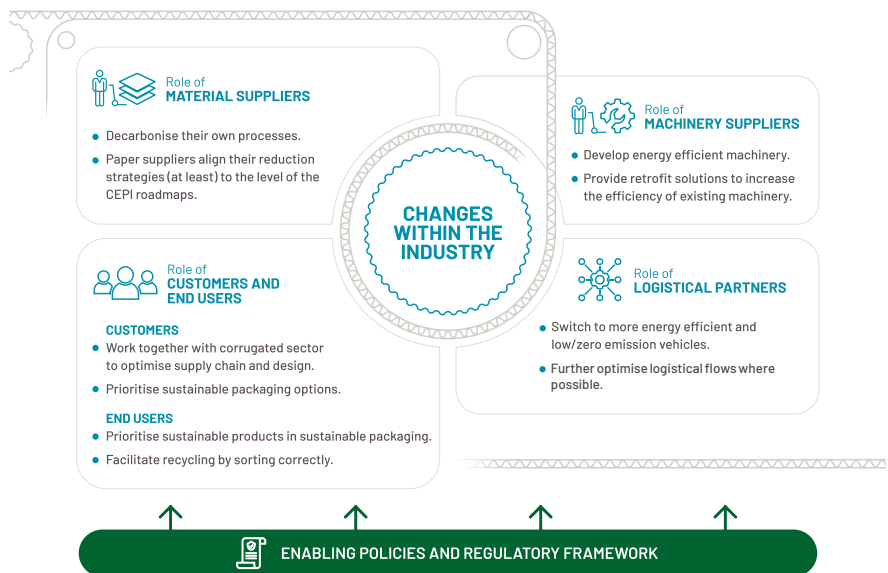


### MAIN EMISSION SOURCES:



\* GHG = Greenhouse Gases

### ACTION NEEDED THROUGH THE ENTIRE VALUE CHAIN - AND BY REGULATORS



# OPERATIONS & INNOVATION COMMITTEE (OIC)

## BEST PRACTICE HANDBOOK

Following on from the work done on the “Roadmap towards climate neutrality”, the OIC focused on drawing up a Best Practice Handbook on Energy Efficiency in Corrugated. This handbook provides manufacturers with practical guidance through a collection of proven strategies and techniques to improve energy efficiency in corrugated cardboard production and conversion processes.

The handbook was presented at the FEFCO Technical Seminar in October 2023 for publication in 2024.



*Robert Tschullik, Klingele, presenting highlights of the Best Practice Handbook*

## LAUNCH OF THE INDUSTRIAL CYBER SECURITY PROJECT

The increasingly interconnected world presents both opportunities and challenges for the industry. The trend towards Industry 4.0 applications, real-time connectivity in the supply chain and the introduction of AI software make our operations more vulnerable to all types of cyber risk.



While cybersecurity is a significant threat to all industries, it has specific implications for the corrugated sector.

In response, under the leadership of **Hans Christian Hansen**, FEFCO has initiated a Cyber Security project to introduce industry-specific guidelines to defend against these threats.

Our aim is to implement measures that enable consistent long-term protection, foster innovation, provide prerequisites for mutual acknowledgment, and establish trust between suppliers and producers in the corrugated board sector.

The workgroup comprises a good mix of producers and suppliers from the industry, who are working together in a strong and open manner to improve and work towards a risk-free (or at least a risk-reduced) operational environment for the benefit of the industry (producers and suppliers) and, ultimately, their end customers.

## FEFCO TECHNICAL SEMINAR 2023

One of the main projects for the OIC throughout the year was the preparation



**“2023 was another challenging year for our industry due to the ongoing low demand for corrugated packaging. This had an impact on our capacity increase projects and so we turned our focus towards efficiency, quality, service, cost reduction and sustainability. As OIC members, we continue to bring our industry together, to exchange best practice and to promote innovative and sustainable projects in corrugated.”**



*Marc Van Damme – Chair, Operations and Innovation Committee (OIC)*

of the Technical Seminar. OIC members are heavily involved in drawing up the programme. Details of The Technical Seminar can be found on page 14.



*OIC members and Eleni Despotou (right) at the FEFCO Technical Seminar 2023*



# NATIONAL DIRECTORS COMMITTEE (NDC)

## THE NATIONAL ASSOCIATIONS HAD THE FOLLOWING PRIORITIES IN 2023:

- PPWR advocacy (at national level)
- Health and safety
- Marketing and communication
- Consistent labelling at EU level
- Food Contact legislation: mineral oils, PFAS, etc.
- Improving industry statistics

### Working towards improved Health & Safety

The National Associations share information with member companies such as safety alerts, best practices and H&S statistics. Sharing information about preventing accidents is key. By doing so we raise awareness and improve safety on sites throughout Europe.

### Advocacy: a coordinated and consistent approach across Europe

Over 80% of legislation originates from Brussels and is implemented nationally. Thus, NDC members must align national advocacy with the EU campaign. A coordinated effort and unified voice are essential for consistent, beneficial results. FEFCO supported the NDC with an advocacy toolkit containing positions, studies, arguments and facts for effective national campaigns. National Associations used this material for websites, advocacy and communications.

Every association mirrored the EU action plan at national level by creating its own list of key national stakeholders for the PPWD file and Circular Economy Action Plan. National Directors activated their networks and organised several meetings in 2023, thus assuring advocacy and communication of our joint positions at all levels.

### Marketing and communication

The National Associations aligned their communications with FEFCO's communication strategy. Campaign

dissemination continued via FEFCO and the National Associations' social media channels.

All communication materials such as visuals and videos were shared, and some countries, including Spain, Poland, France and Germany, translated them into their local language and used data and studies in their own communication. In this way, they supported the industry's advocacy work.

### Company visits

In 2023 the NDC Committee had an on-location meeting in Madrid, kindly hosted by the Spanish corrugated packaging association AFCO. This was a good chance to visit International Paper's paper and corrugated factory and learn about the Spanish market and its production conditions. Exchange of practical knowledge between national associations is essential.

## 2023: CHANGES IN NATIONAL ASSOCIATIONS

### Greece: HPPA

In 2023 FEFCO was key to the creation of the Hellenic Paper Packaging Association (HPPA) and welcomed it as a member. Ifigenia Tarou, Secretary General of HPPA joined the NDC Committee and, with the support of the Board and members, assisted FEFCO by reaching out to high level policy makers to advocate on PPWR.

### UK: Confederation of Paper Industries (CPI)

Andrew Barnetson (CPI) left the NDC Committee due to a change in his director position and was succeeded by Dimitra Rappou. FEFCO is grateful to Andy for his dedication and commitment to the corrugated cardboard packaging industry. We welcome Dimitra and trust that our fruitful cooperation with CPI will continue.



**"In 2023, National Associations demonstrated their value by advocating for the industry in the Packaging and Packaging Waste Regulation consultation. Their efforts influenced national ministers during the EU Council's decisions on the PPWR. National Associations collaborated with CEOs and specialists from corrugated companies and stayed in close contact with the FEFCO team. This showed our industry's strong network of key policy stakeholders. As Chair of the NDC, I enjoyed working with this motivated group of National Directors and the FEFCO team."**



*Peter van Ostaijen  
(Corrugated Benelux Association CBA), Chair,  
NDC Committee.*

### Romania: ROMPAP

In November 2023, Altafinii Tudose became the new Executive Director of our Romanian Association (ROMPAP). Cosmin Alexandru Ionescu left ROMPAP at the end of 2023.

### Czech Republic: SVVL

Walo Hinterberger announced his retirement and was succeeded by Václav Mlynar, President of SVVL. Walo greatly supported the PPWR battle, advocating at a high level in the Czech Republic, and contributed to the vital statistics project. Despite retiring, Walo will continue working on PPWR until its adoption. FEFCO welcomes Václav to the corrugated cardboard family and wishes him much success in his mission.



# STATISTICS COMMITTEE



## A REVAMPED DATABASE

FEFCO has launched a project to revamp its statistical database, focusing on gathering quality data to enable member companies to monitor markets and industry performance and support their advocacy efforts.

## IMPROVING DATA COLLECTION

Dr Jens Neumann of Prima Verpackung is leading the newly established Statistics workgroup to effectively manage the project, with the support of a prominent consultant hired to facilitate the work.

Furthermore, valuable definitions and practical procedures for data acquisition and evaluation are ongoing with the aim to improve the accuracy of FEFCO data. The workgroup requested and received legal advice in response to various concerns. Future actions will focus on prioritising and improving the quality and scope of data collection with the following objectives:

- **Performance monitoring:** member companies can track their performance accurately and make data-driven decisions
- An “at a glance” **dashboard** about the

status of our industry, augmented by in-depth and inside knowledge of the economic and technical context

- **Economic data** to give insights into future development in its proper context
- **Strategic adaptation:** help companies adapt their strategies and marketing plans based on solid data insights
- **Informed investments:** provide a reliable foundation for making informed investment decisions
- **Support advocacy efforts:** provide robust data to better demonstrate corrugated cardboard industry credentials

## DELIVERABLES

As part of this initiative, improvements to monthly statistics started in November 2023 and reporting processes at the beginning of 2024. These enhancements have helped streamline data collection and the timely dissemination of monthly reports.

In addition, the annual questionnaire update was finalised and distributed to Active Members in June of this year. Based on the progress made, the anticipated release of the 2023 report is the end of July 2024.

## IMPROVED DATA TO SAFEGUARD THE INDUSTRY'S FUTURE

The revamping of FEFCO statistics is an ongoing process, enabling the industry to get up-to-date and in-depth information about the status of our industry at a European level. It also facilitates greater understanding of our industry's role in the production and distribution of goods inside the EU and as an exporting supranational body.

By improving the quality and relevance of data, the Secretariat and the dedicated Workgroup aim to better equip member companies with valuable data in a competitive market. FEFCO is confident that these improvements will significantly benefit the corrugated industry and looks forward to continued collaboration with all members to achieve our shared goal: to develop a healthy, profitable, environmentally friendly asset for transporting goods around Europe and abroad.



**“Our committee's goal is to collect robust and credible statistics that not only support our member companies in achieving their business objectives but also provide the secretariat with a comprehensive overview of our membership.”**



Jens Neumann  
Chairman



WHO'S WHO

# FEFCO GOVERNANCE

## FEFCO BOARD OF DIRECTORS 2023

The Board of Directors is composed of a minimum of 5 and a maximum of 25 members, including the President of the Association.

## FEFCO EXECUTIVE BOARD

The Executive Board is composed of the President, two Vice Presidents and an Honorary Vice President.



**PRESIDENT**  
FADY GEMAYEL



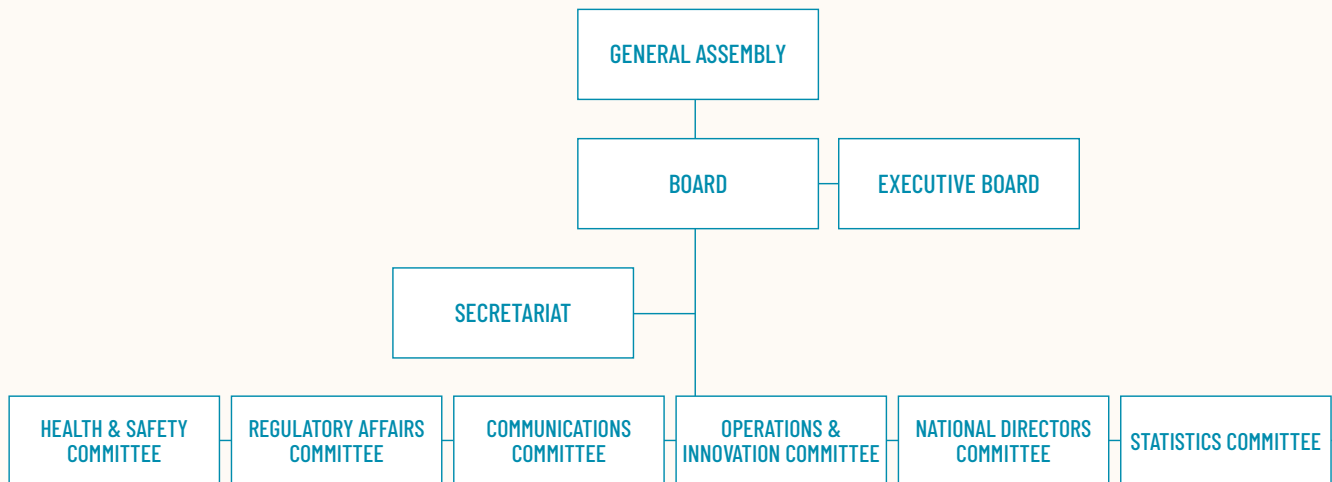
**VICE PRESIDENT**  
SAVERIO MAYER



**VICE PRESIDENT**  
JAN KLINGELE



**HONORARY VICE PRESIDENT**  
NINA IVERSEN



- Taskforce PPWR
- Biodegradability of corrugated WG
- Sustainability & Circularity WG
- Product Safety WG
- Recyclability Guidelines Review WG
- Ad hoc work groups on projects/studies
- Cyber Security WG
- LCA Reference WG (with CCB)
- Sustainable Manufacturing WG

WG = Work Group

## FEFCO BOARD OF DIRECTORS 2023

EXECUTIVE BOARD		MAJOR COMPANIES	
<b>Fady Gemayel</b> President	<b>Saverio Mayer</b> Vice President	<b>Eric Chartrain</b> International Paper Europe	<b>Alex Manisty</b> DS Smith Packaging
<b>Jan Klingele</b> Vice President	<b>Nina Iversen</b> Honorary Vice President	<b>Saverio Mayer</b> Smurfit Kappa Europe	<b>Armand Schoonbrood</b> Mondi Packaging Europe
ASSOCIATIONS		REPRESENTATIVES OF CLUSTERS	
<b>Philippe Durand</b> France (COF)	<b>Steffen Würth</b> Germany (VDW)	<b>Miklós Rasovszky</b> Hungary (HFCBM), Romania (ARFCO)	<b>Nina Iversen</b> Finland (FCBA) Sweden (SWIF)
<b>Fausto Ferretti</b> Italy (GIFCO)	<b>Pawel Rogalka</b> Poland (SPP)	<b>Dirk Ockerman</b> Austria (Forum Wellpappe and PPV) Croatia (UHPVK), Czech Rep (SVVL)	
<b>Leopoldo Santorroman Saldana</b> Spain (AFCO)	<b>John Weedon</b> UK (CPI)	<b>Alexander Enzenberg</b> Austria (Forum Wellpappe and PPV) Croatia (UHPVK), Czech Rep (SVVL), Greece (HPPA)	

## FEFCO SECRETARIAT

The day-to-day work of the association is carried out by the secretariat and managed by the Director General.



**DIRECTOR GENERAL**  
ELENI DESPOTOU



**COMMUNICATIONS DIRECTOR  
(DEPUTY DIRECTOR GENERAL)**  
NATHALIE SCHNEEGANS



**EU PUBLIC AFFAIRS DIRECTOR**  
LAURA MAZZEI (JOINED  
NOVEMBER 2023)



**TECHNICAL DIRECTOR**  
(KRASSIMIRA KAZASHKA UNTIL  
NOVEMBER 2023)



**PROJECT MANAGER**  
HOURIET LEFEBVRE



**OFFICE MANAGER**  
JOHANNA KLOECK



**EU PUBLIC AFFAIRS OFFICER**  
HANA GALLEGO



**FEFCO ACCOUNTANT**  
ROSI DIMITROVA



# COOPERATION AND NETWORK



## INDUSTRY COOPERATION AND EU NETWORK

FEFCO has established close links with organisations in the paper and board value chain and other packaging associations. We cooperate with other industry associations on matters of common interest where experience and knowledge are exchanged and joint actions are taken, where appropriate.

### Cepi ContainerBoard CCB – CEPI ContainerBoard

CCB is a European industry association for producers of corrugated case materials, also called containerboard. Activities are focused on primary-fibre materials (kraft liner, semi-chemical fluting) and recycled-fibre containerboard (e.g. testliner). Members represent a total European production capacity of more than 25 million tonnes of corrugated case materials. Recently, CCB and FEFCO strengthened their ties as they both represent the same industry. FEFCO cooperates with CCB mainly on technical matters such as life

cycle assessment (LCA), food contact materials and standards.

## PARTNER ASSOCIATIONS



### CEPI – Confederation of European Paper Industries

Cepi is the European association representing the paper industry. In 2023, FEFCO and Cepi collaborated closely on all matters of common interest, notably the Ecodesign for Sustainable Products Regulation, Deforestation Regulation, Green Claims Directive, Food Contact Materials Regulation and others. They are both members of the Fibre Packaging Europe coalition.



FIBRE BOX ASSOCIATION

### FBA – Fibre Box Association

FBA is a trade association that represents North American corrugated packaging manufacturers and strives to grow, protect and improve the overall welfare of the industry through member-valued programmes and services.

FBA has worked in close cooperation with FEFCO to harmonise the US and European common footprint quality (CFO) standards for corrugated food trays.

FBA also endorsed the FEFCO Code of designs (previously known as the International Fibreboard Case Code).

Statistics and the International Corrugated Case Association (ICCA) are additional areas of cooperation.

## JOINT ACTIVITIES AND COALITIONS



### CITPA – International Confederation of Paper and Board Converters in Europe

CITPA represents the interests of the European paper and board converting industry. FEFCO, a longstanding member of CITPA, regularly meets and exchanges ideas with the association members. CITPA develops joint positions on various topics, including environmental and product safety issues, to advocate for the interests of paper and board converters in Europe. Additionally, CITPA is an active member of the European Paper Recycling Council (EPRC).



### Circular Choices for a competitive EU Bioeconomy

In March 2023, FEFCO joined a new cross-sectoral coalition of 14 EU trade associations. The coalition's aim is to present EU policymakers with an ambitious common vision ahead of 2030 and, going beyond, a transition towards a circular bioeconomy. FEFCO is part of the coalition and regularly posts on its own social media channels news regarding activities and events organised by the coalition.

### Fibre Packaging Europe (FPE)

FPE is an informal coalition of seven trade associations representing industries involved in forestry, pulp, cardboard (paper, board and carton packaging) production and recycling in Europe. They come together to speak with one voice on the policy issues central to the fibre packaging value chain in the EU. By uniting diverse industry sectors, FPE's coordinated actions and strong advocacy efforts in 2023 were instrumental in shaping and influencing the regulatory landscape for packaging and packaging waste in Europe. The fibre-based packaging industry is a key contributor to the European Green Deal's aspiration to build a strong, circular and resource-efficient European bioeconomy.

### PIJTIF (Packaging Inks Joint Industry Task Force)

PIJTIF represents the members of the food packaging supply chain that are involved with the application of printing inks onto food contact materials. The work on technical aspects continues and the group meets and works on joint positions across the value chain to ensure that the final packed food product placed on supermarket shelves is safe for consumers.

### Packaging Chain Forum (PCF)

FEFCO is a member of PCF, which represents the packaging value chain. It is led by European trade associations and companies representing or dealing with packaging and environmental issues across different materials and sectors. As part of the coalition, FEFCO co-signed a joint position on the Packaging and Packaging Waste Regulation and the Single Market, addressing issues of joint interest.

### CSG – Cross Sector Group on food contact

The CSG on food contact represents a broad group of representatives of many food contact material manufacturers, from the chemical industry up to the

producers of household goods. The goal of the CSG is to develop basic principles which need to be considered by all players in any food contact material related sector. Key actions involve establishing science-based safety standards for consumers, advocating for the safety of food contact materials, promoting supply chain efforts and increasing trust and transparency.



### International Corrugated Case Association (ICCA)

FEFCO is a co-founding member of ICCA, a platform for worldwide networking of corrugated associations. The association disseminates global statistics on corrugated. ICCA's services support and promote its members' work, and contribute to the prosperity of the corrugated packaging industry worldwide. Global statistics or plastic substitution reports are also ICCA deliverables.

ICCA members are regional associations, and for more than 40 years they have been meeting on a bi-annual basis at different locations around the world. These conferences are hosted by the regional organisations. FEFCO holds the seat of VP Europe on the ICCA Board. The last ICCA conference took place in May 2023 in Banff, Alberta, Canada. Since 2007, ICCA and the World Containerboard Organisation (WCO) have

been co-sponsors of the Global Summit.

### Cross-industry platform on the EU chemicals strategy for sustainability

Representing multiple industry sectors and led by the European Chemical Industry Council (Cefic), this cross-industry platform amplifies the voices of its members to collaborate on issues pertinent to the EU chemicals strategy for sustainability. FEFCO is an active member, working closely with other associations on these matters.

### CheMI (European Platform for Chemical Using Manufacturing Industries)

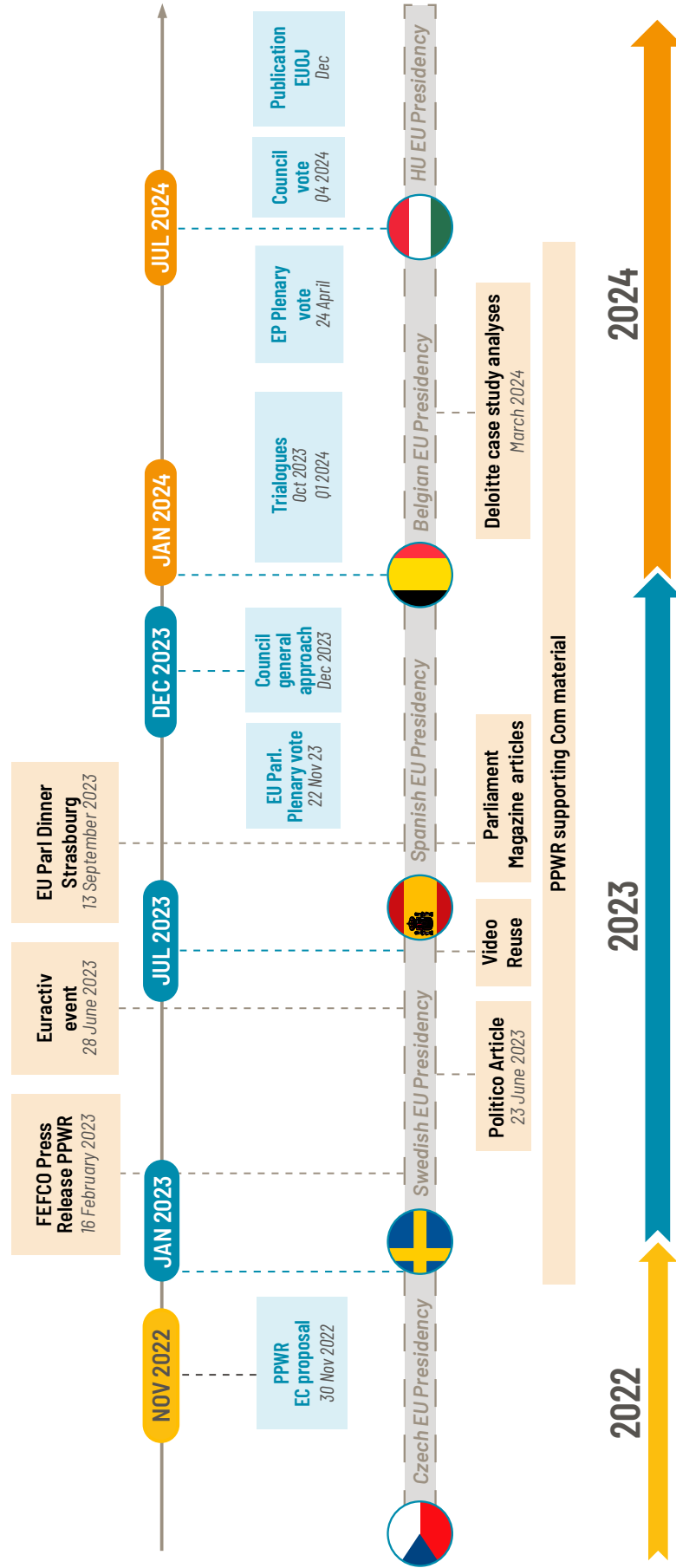
CheMI, led by the European printing industry association Intergraf, is a platform for downstream users of chemicals in manufacturing industries. It represents their interests and aims to assist in the successful implementation of the regulation on the registration, evaluation, authorisation and restriction of chemicals (REACH). CheMI was established in 2003. Its members are trade associations representing a variety of sectors, including FEFCO.



ICCA conference participants including Eleni Despotou and some FEFCO board members participating and chairing some sessions.



# PPWR Journey





# EXAMPLES OF PRESS COVERAGE BY NATIONAL ASSOCIATIONS AND MEMBERS



40



EU VERORDENING VERPAKKINGEN:

## 'Ondoordacht plan benadeelt circulair karton'

Enkele partijen in het Europees Parlement willen de voorgestelde Packaging and Packaging Waste Regulation (PPWR) weer aanschrijven. Zij hebben hiervoor een reeks amendementen ingediend met als doel meer hergebruik te verplichten. Hierdoor komen er meer plastic verpakkingen op de markt, waarschuwt de golfkartonindustrie.

De voorgestelde verpakkingen in het voorstel van de Commissie verschillen niet met voorgedraaide oplossingen. In de huidige versie van de verpakkingen wordt hergebruik van verpakkingen niet verplicht. Dit wil zeggen dat verpakkingen die worden gebruikt voor transportverpakkingen niet worden gerecycled. Dit kan tot een toename van de hoeveelheid afval op de markt leiden. Dit kan tot een toename van de hoeveelheid afval op de markt leiden. Dit kan tot een toename van de hoeveelheid afval op de markt leiden.

Kartonindustrie vreest strengere verpakkingsregels. De Europese Commissie heeft een voorstel voor een verpakkingenwet (PPWR) uitgebracht. Dit voorstel zou de verpakkingenindustrie verplichten om meer gebruik te maken van duurzame materialen. Dit kan tot een toename van de hoeveelheid afval op de markt leiden. Dit kan tot een toename van de hoeveelheid afval op de markt leiden.

Mandatory PPWR reuse targets threaten "plastics flood" and backtrack on European progress, says DS Smith. The company says that the proposed increase in reuse targets for plastic packaging could result in a massive increase in plastic waste. This could result in a massive increase in plastic waste.



# FEFCO COMMUNICATION MATERIALS USED BY NATIONAL ASSOCIATIONS

## FECFO-Studie: Zahlen & Fakten

Vorteile von Wellpappe in der EU

Verpackungen aus Papier und Karton:  
**83 %**  
Recyclingquote

Plastikverpackungen:  
**42 %**  
Recyclingquote

Quelle: Comparative Life Cycle Assessment (LCA) / Packaging Solutions for the Food Segment Eurostat EU 28, 2018

VDW

## ¿Cuál es la realidad en cuanto a la reutilización de envases?

Aumentar la reutilización podría suponer un aumento de la huella de carbono en lugar de hacerla desaparecer.

¿Lavado?

¿Almacenamiento?

¿Un real de reutilización?

¿Transporte adicional?

AFCO

## Fakten vs. Fragezeichen

FEFCO-Studie bringt Klarheit!

VD

## Reciclar el cartón utilizado es la forma más eficaz de reducir los residuos de envases.

#PPWR

CIRCULAR BY NATURE

## #PPWR reuse targets

### Do we really want a plastic economy?

FEFCO Corrugated Packaging

## #PPWR reuse targets

### Do we really want a plastic economy?

FEFCO Corrugated Packaging

## Choppy Bikes: gdzie opakowanie spotyka się z zabawą

## Inteligentne opakowanie na pizzę – podwójna ilość pizzy i połowa przestrzeni

W świecie innowacji działalności firma Choppy Bikes z Łodzi wypróbowywała projektami w dziedzinie zabawy, ale także zmian przemysłowych rozwiązań i innowacji. Manipulowanie geometrią, zaangażowanie wizualne i innowacje, dostarczające minimalną. Minimalizacja zużycia materiałów, przez zwiększenie powierzchni użytku do produkcji, ale także odrobina koo. Zainwestowanie w innowacyjny rozwój jest widoczne w rob

CORRUGATED BY NATURE

## FEUILLE DE ROUTE pour la NEUTRALITE CLIMATIQUE

en 2050 pour l'industrie du carton ondulé

CLIMACT APERCU DES RESULTATS

FEFCO Corrugated Packaging

CIRCULAR BY NATURE



# NOTES

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---





**The Federation of Corrugated Board Manufacturers**

Avenue Louise 250

B - 1050 Brussels

Tel + 32 2 646 40 70

[www.fefco.org](http://www.fefco.org)

X (formerly Twitter): @FEFCO

General information and requests for publications:  
[info@fefco.org](mailto:info@fefco.org)

Printed on recycled paper