

FEFCO SUMMIT ATHENS

15-17 MAY
2024

ATHENS, Greece

Divani Apollon Palace & Thalasso Hotel



LEADING CIRCULARITY



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EDITORIAL



Two years ago, at the 2022 FEFCO Summit in Amsterdam, our theme was 'Fit for the Future'. As we approach our 2024

Summit, in Athens, we may ask: was that all big promises or did it set the compass for our sector? These past two years have certainly been difficult: the waters didn't calm, and our existing harbours became less safe.

The current crisis represents a historical turning point in the energy system and even more so for European industry. The old motto 'innovative or die' has never been more appropriate for industry in the 'old continent'.

Technology is reshaping companies, sectors and societies at an unprecedented pace. In our industry, technological innovation grows at its own pace. So, what can we do to support our industry's growth?

We can change the game! We can change how we are perceived by society. Through education, and by sharing our biggest strength: we are sustainable by nature. That's why the theme for our 2024 Summit is 'Leading Circularity'.

Corrugated cardboard may not be the sexiest industry to a talented young person anticipating a professional career. But that's because they don't really know us! There's limited brand awareness of who we are and what we really deliver.

By Leading Circularity we make ourselves fit for the future.

We don't just provide packaging options. We also provide the optimum environmental solutions. We need to show people our core values and what we do, so that our industry can receive the recognition we are due.

Emerging leaders are a better version of us. They're focusing less on profit targets and more on long-term sustainability and the actions required to mitigate global warming.

Let's position our industry where it should be for this mindset. It will require concrete and unified actions from all stakeholders. And it will pay off. By Leading Circularity and building awareness, economic prosperity will follow. We look forward to welcoming you in Athens.

Vassilis Exarchos

President of the Hellenic Paper Packaging Association (HPPA)



FEFCO SUMMIT 2024

LEADING CIRCULARITY

The FEFCO Summit is the number one event gathering leaders within the European corrugated industry and their suppliers. It's an unmissable opportunity to gain insights into global packaging trends and EU legislation affecting packaging and the supply chain, and to understand the challenges and opportunities facing corrugated manufacturers and end users.



This year, our Summit title - Leading Circularity - reflects the enduring themes that have been the driving force behind our industry's progress and that continue to guide us forward. During the conference sessions, we will:

- review and discuss what we have learnt from the tough journey we've been on over the past two years, and what has been achieved
- analyse the outcomes from the Packaging and Packaging Waste Regulation (PPWR)

- delve into circularity
- address sustainability concerns and key EU policy issues affecting the industry.

The Summit will also give the floor to players outside the sector, with the participation of a Greek non-governmental organisation, and the Minderoo foundation.

The FEFCO Summit is a valuable opportunity for all our sector stakeholders to exchange ideas, insights and best practices, and to listen to other experts, industry leaders and politicians. We very much look forward to your joining us in Athens and to your participation during the panel discussions.

FEFCO SUMMIT 2024 - CONFERENCE PROGRAMME

WEDNESDAY 15 MAY

16:00 - 18:00	Registration at Divani Apollon Palace & Thalasso hotel
19:00 - 21:00	Welcome reception at the Divani Apollon

THURSDAY 16 MAY

	Moderator Valerie Thys
09:00 - 09:10	Welcome address Dr Fady Gemayel, President - FEFCO
09:10 - 09:25	Keynote speeches Constantinos Skrekas, Minister of Industry & Development
09:25 - 09:30	Maria Spyraiki, Member of the European Parliament
09:30 - 09:45	Opening speech Vasilis Exarchos, President of the Hellenic Paper Packaging Association (HPPA)

SETTING THE SCENE 2024 AND BEYOND

09:45 - 10:05	Industry and the global economy: Trends and challenges Nikos Vettas, General Director, Foundation for Economic and Industrial Research (IOBE), Professor, Athens University of Economics and Business
10:05 - 10:25	Corrugated markets outlook - Seizing the day in a changing world Neil Osment, Managing Director, NOA Consulting
10:25 - 10:45	Containerboard markets outlook – Past, present and future Paul van Bezouw, Managing Director, Cepi ContainerBoard
10:45 - 11:30	Coffee break

PACKAGING & PACKAGING WASTE REGULATION (PPWR) CHALLENGES AND OPPORTUNITIES

11:30 - 11:50	PPWR: Navigating Europe's new regulatory landscape Eleni Despotou, Director General, FEFCO
11:50 - 12:10	Customer (Speaker tbc)
12:10 - 12:30	Retailer perspectives (Speaker tbc)
12:30 - 13:00	Statements and panel discussion: How the PPWR can shape the corrugated industry EU Commission (speaker tbc) - Saverio Mayer, CEO Europe Smurfit Kappa - Alexander Enzenberg, Managing Director Operations, Procurement & ESG, Dunapack Packaging - Alex Manisty, Group Head of Strategy and Innovation, DS Smith - Franziska Decker, Environment Policy Manager, APPLiA
13:00 - 14:15	Lunch at the Divani Apollon

CORRUGATED – PIONEERING SUSTAINABILITY

14:15 - 14:35	Green claims and taxonomy Jori Ringman, Director General, Cepi
14:35 - 14:50	Environmental, social and governance (ESG) standards and reporting Outi Marin, Head of Sustainability, Smurfit Kappa
14:50 - 15:05	Combatting climate change Maija Aho, Head of Sustainability, Stora Enso, Packaging Solutions
15:05 - 15:20	Best Practice Handbook for Improved Energy Efficiency Robert Tschullik, Project Engineer, Klingele

15:20 - 15:35	HPPA Sustainability Report 2021-2023 Dr Konstantinos Kyriakos, Sales, Marketing & Innovation Manager, DS Smith
15:35 - 15:45	Q&A All speakers
18:00 - 22:30	Evening programme
18:00 - 19:00	Departure from the Divani Apollon
19:00 - 20:00	Optional visit: Acropolis Museum, Dionysiou Areopagitou 15, Athens 117 42,
20:00 - 22:30	Cocktail and get-together dinner at Acropolis Museum – Sponsored by BOBST Handover of the FEFCO Presidency
22:30	First bus back to the Divani Apollon

FRIDAY 15 MAY

Moderator Valerie Thys

ADAPTING TO THE NEW WORLD – STRATEGIC ISSUES FOR THE INDUSTRY

09:00 - 09:20	AI in the paper packaging industry: The challenge of today and the path for the future Prof. George Ioannou, Athens University of Economics and Business
09:20 - 09:40	Reinvention of the packaging industry in the era of AI Dr Charalampos Charalampous, Industry Lead, Accenture Greece
09:40 - 09:55	FEFCO initiative on cyber security Hans Christian Hansen, Industrial Control Director, DS Smith
09:55 - 10:10	Cyber security on par with sustainability Leonidas Tougiannidis, Regional Director, Fortinet
10:10 - 10:30	Panel discussion – How the new technologies can impact the corrugated industry All speakers
10:30 - 11:00	Coffee break

REACHING THE EU TARGET AUDIENCE

11:00 - 11:20	Communicating in a rapidly changing world: FEFCO's experience in staying one step ahead Phil Weiss and Jesús Azogue, ZN Consulting
11:20 - 11:40	Greening the EU economy: A regulatory framework for low-carbon materials? Axel Darut, Circular Economy Specialist, Minderoo Foundation
11:40 - 11:55	Uniting for sustainable seas and circular solutions Dimitrios Alexopoulos, Partnerships Manager Sustainability & Circular Economy, Enaleia
11:55 - 12:10	Marine litter threatens health and economy Anthi Angelopoulos, Naftemporiki, Health & Next Generation, Boussias Media
12:10 - 12:30	Panel discussion: Engaging European audiences on environmental issues Greg Dawson, Director of Corporate Affairs, DS Smith and session speakers
12:30 - 12:40	Closing remarks Eleni Despotou, FEFCO - New FEFCO President
12:40	Lunch at the Divani Apollon
14:00	Summit ends

PRACTICAL INFORMATION

The FEFCO Summit is organised by FEFCO with the support of the Hellenic Paper Packaging Association (HPPA).

We extend our gratitude to the President and Secretary General of HPPA, as well as all those involved in organising the Summit, for their valuable contributions. Their assistance has been instrumental in helping FEFCO assemble an engaging programme and providing guidance on activities. Visit the website at:

www.fefco.org/fefco-summit-2024

VENUE

FEFCO has chosen the Divani Apollon Palace & Thalasso hotel for an unparalleled Summit experience. This venue combines state-of-the-art conference facilities with breathtaking surroundings. With beautiful sea views and versatile meeting spaces, it offers the perfect and inspiring backdrop for productive discussions.

Divani Apollon Palace & Thalasso hotel

- 10 Agiou Nikolaou str. - 166 71 Vouliagmeni, Athens, Greece
- +30 210 8911100
- www.divanis.com

“The programme was very interesting. And the speakers and delegates were eager, engaged and active in the discussions.”

FEFCO Summit 2022 participant

SOCIAL EVENTS DURING THE SUMMIT

15 MAY 19:00 – 21:30

Welcome reception at the Divani Apollon

The hotel's prime location in the heart of the Athenian Riviera makes it an ideal choice for a memorable seaside reception in Athens.

Experience exquisite cuisine and a delightful atmosphere at the Divani Apollon, where every meal is a feast for the senses. The culinary offerings are crafted with meticulous attention to detail, featuring a fusion of Mediterranean flavours and international influences.

The FEFCO Welcome reception will be held by the pool and in the surrounding garden.

16 MAY 19:00 – 20:00

Optional guided tour - Acropolis Museum Athens

- Dionysiou Areopagitou 15, Athens 117 42

FEFCO will be sending invitations to participants. If you would like to visit the museum, you can register for the guided tour.

The Acropolis Museum is a renowned archaeological museum dedicated to showcasing artifacts found at the Athens Acropolis. Situated near the ancient site, it offers a fascinating journey through the history of ancient Greece. With its modern design and extensive collection of

ancient treasures, the Acropolis Museum offers visitors a captivating insight into the splendour of ancient Athens.

16 MAY 20:00 – 22:30

Cocktail reception and dinner at the Acropolis Museum

The reception is sponsored by BOBST.

Located at the base of the iconic Acropolis, this architectural masterpiece offers a unique museum experience. Crafted by renowned architect Bernard Tschumi, the museum seamlessly blends modern aesthetics with ancient artifacts. This innovative design creates a seamless connection between the museum's contemporary spaces and the historic treasures it houses, offering a truly immersive experience of Greece's rich cultural heritage.

The top floor, where the FEFCO dinner will be held, offers a panoramic view of the Acropolis and modern Athens.

20:00

Welcome

20:30

Seated dinner

During dinner there will be a few brief dinner speeches and a ceremony for the handover of the FEFCO Presidency.

22:30

First bus back to the Divani Apollon

Dress code: Business attire

This reception and dinner are sponsored by Bobst.

SPONSORS

A big thank you to all our sponsors for supporting the FEFCO Summit. Your contribution and loyalty reinforce the success of this event and are highly appreciated. FEFCO values your commitment. Thank you for being part of our Summit journey.

Silver sponsor



Get-together dinner on Thursday 16 May 2024 at the Acropolis Museum

Bronze Sponsor



Event lunches on 16-17 May 2024 at the Divani Apollon

Lanyards - FEFCO Summit badges

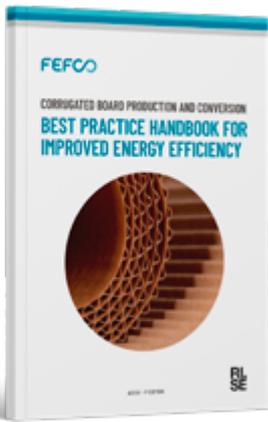


Giveaways for delegates



FEFCO HAS LAUNCHED ITS BEST PRACTICE HANDBOOK FOR IMPROVED ENERGY EFFICIENCY

The Best Practice Handbook for Improved Energy Efficiency is a comprehensive guide to enhancing energy performance in corrugated board production and conversion processes, aligning with the industry's Climate Neutrality Roadmap 2050. This work is the result of a collaboration between the FEFCO Sustainable Manufacturing Workgroup and RISE Bioeconomy and Health.



The Handbook focuses on three main strategies to support the 2050 roadmap: using materials more efficiently, improving energy efficiency and reducing carbon emissions.

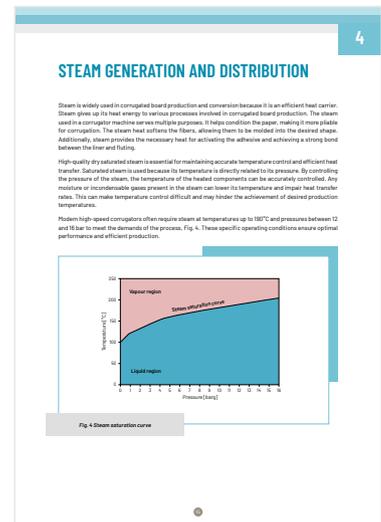
The best practices cover various aspects of production, conversion and energy management, with a focus on solutions implementable in the short term – typically 1 to 3 years. The guide emphasises the need for sustainability, and presents a range of strategies and techniques to enhance energy efficiency in the industry. By adopting the recommended practices, corrugated board manufacturers and converters can achieve significant energy savings, reduce carbon emissions and enhance

operational efficiency.

The content is based on the results of a questionnaire, enriched by the perspectives and expertise of industry experts, equipment manufacturers and suppliers who were interviewed for the Handbook. The best practices prioritisation was devised through a collaborative workshop with industry experts. This multifaceted approach ensured that the Handbook addresses the challenges, opportunities and potential solutions identified by the corrugated board industry stakeholders themselves.

The Best Practice Handbook for Improved Energy Efficiency serves as an invaluable resource for industry professionals, managers, engineers and sustainability practitioners looking for practical insights – aligned with the industry priorities and aspirations – to improve energy performance in corrugated board production and conversion processes.

FEFCO's aim, under the FEFCO Climate Neutrality Roadmap 2050, is to support companies in the corrugated cardboard industry in enhancing their energy efficiency strategies, thereby contributing to a sustainable future. The publication of this handbook marks a pivotal moment in this commitment.



WORKSHOP

Implementing Energy Efficiency and Decarbonising Practices in Corrugated Manufacturing

24 October 2024

Sheraton hotel Brussels airport



PACKAGING AND PACKAGING WASTE REGULATION (PPWR)

In March 2024, during the Belgian Presidency, a provisional agreement on the PPWR was reached by the European Council (EC) and Parliament (EP). Based on a proposal by the European Commission of November 2022, the final text aims to restrict certain types of single-use packaging and ensure that packaging is reusable or recyclable in a harmonised and feasible way by 2030.

Over the past year, FEFCO and its members have engaged on the PPWR, negotiating at EU and national levels. As we await its final adoption and publication in the EU Official Journal, FEFCO will actively contribute to the secondary legislation phase. Once the PPWR enters into force, Member states will have 18 months to apply the new rules.

The PPWR:

- includes 40 % mandatory packaging re-use targets for 2030 and indicative 70% targets for 2040
- introduces key derogations for cardboard boxes and packaging used for dangerous goods or large-scale equipment for transport incl. e-commerce, sales and grouped packaging
- includes waste reduction targets for plastic
- introduces a minimum percentage of recycled content to be used in the manufacturing of new packaging
- outlines key provisions regarding the reduction of unnecessary packaging by capping the maximum empty space ratio at 50% in grouped and transport packaging

- includes requirements for substances of concern in packaging, imposing, for the first time, a restriction on food contact packaging containing PFAS above certain thresholds.

The next significant step is the EP plenary vote to adopt the text, on 24 April 2024. FEFCO will support the implementation of this critical regulation by sharing its expertise and encouraging collaboration. Adopting the PPWR without delay will allow for a quick start on secondary legislation, ensuring a smooth and viable transition across the value chain.

The publication of the PPWR text in the Official Journal is expected after the European Elections in June 2024, which will mark the start of a new 5-year institutional cycle. The identification of the bloc's new leadership will be crucial in determining the EU industrial and supply chain policies until 2029. Key policy pillars such as sustainability, circularity and strategic autonomy may form the foundation for the new institutional programme.

FEFCO will continue to engage with the newly elected EP members and key

policymakers, raising awareness of the sustainability of the EU corrugated sector and acknowledging that competitiveness and a functioning single market are essential to achieving Europe's political, economic and environmental ambitions.

In 2024, resources and energy policies will garner significant attention in the EU and beyond. FEFCO looks forward to contributing to the discussion as a full supporter of a well functioning European Union.

The corrugated industry's commitment to the energy and digital transitions underscores the potential for EU ambitions to drive economic prosperity. As we move forward, it is essential to evaluate the collective impact of regulations on EU competitiveness, emphasising streamlined approval processes and avoiding overly prescriptive measures. FEFCO remains fully committed to advocating for sustainable and resilient industrial practices.

New activity

Amidst the challenges posed by the COVID-19 pandemic and global security threats, FEFCO recognises the importance of cyber security in safeguarding the industry's critical infrastructure. The FEFCO cyber security initiative, launched in 2023, aims to address emerging cyber threats and enhance the resilience of the corrugated sector by developing and promoting guidelines and best practices to ensure the sector's overall performance.

NEW COMMUNICATION MATERIALS AND RECENT WEBINARS



In 2023, FEFCO appointed Deloitte to conduct a study on the impact of reuse. Its purpose was to improve the understanding of reuse impacts in order to inform the public debate and contribute to better policy making.

In February 2024, FEFCO published a graphical summary of the main findings of the Deloitte analysis, which assessed the impacts in the supply chain of substituting corrugated cardboard packaging with reusable alternatives.

The full report, assessing impacts in the supply chain of substituting corrugated cardboard packaging with reusable alternatives, explores these impacts, focusing on logistics aspects – including transport and storage – and environmental impacts. The analysis builds on two case studies related to grouped packaging for biscuits and packaging for heavy furniture kits. An analytical model compiles insights from industry interviews and literature data to provide quantitative and qualitative insights.

Key findings

Legal obligations that impose reuse would lead to substantial logistics and other practical challenges across the whole supply chain. It will not only be challenging for market actors, but the burden for end consumers could also be significant. It could also be damaging for the environment.

"Reducing the amount of single-use packaging material seems to be the obvious sustainable action to take. However, when analysing the supply chain in several case studies, the economic and even the environmental benefits of reusable packaging materials are less clear cut. An analytical model highlights that the logistics advantages of lightweight, well recycled and customisable single-use packaging can be greater than the benefits of having less materials from reusable packaging", said Arne Devriendt, Senior Manager, Sustainable Supply Chain at Deloitte.

Find the summary and report here: www.fefco.org/eu-policy/supply-chain-case-study-analyses

New FEFCO Key Facts brochure

While we no longer see a significant threat of a big shift towards more plastic packaging, it has not gone away. The issue remains highly relevant for the packaging and corrugated cardboard sector. The FEFCO Communication Committee therefore decided to compile the positive benefits of corrugated and some evidence regarding the impact of a shift to reuse. The new document outlines the key benefits of corrugated packaging and provides responses to misleading information regarding reuse.

Find the brochure here: www.fefco.org/eu-policy/fit-for-circularity



European Deforestation Regulation webinar

FEFCO held a webinar on the European Deforestation Regulation (EUDR) on 26 January 2024, an initiative of the Sustainability group, chaired by Outi Marin. The webinar provided an introduction to EUDR, presented by Caroline Stein, Sustainable Sourcing Expert, covering the EUDR objectives and key compliance aspects.

Topics covered in the webinar included:

- fundamental differences between the new EUDR and the current EU Timber Regulation (EUTR)
- some theoretical sourcing scenarios
- EUDR obligations, depending on position in supply chain
- practical recommendations.

A Q&A document addressing participants' questions was distributed.

To receive a copy of the presentation or Q&A document, contact the FEFCO secretariat (FEFCO members only).

H&S webinar – CE Marking and Machine Safety

The FEFCO Health & Safety Committee, chaired by John Nicholls, organised a webinar on 27 March 2024 on the topic of CE marking and machine safety. The presentation, by Nick de With, Safety Consultant Netherlands, provided an introduction to EU regulations on machinery.

It also covered what to look out for when purchasing new machinery and the consequences of adjusting existing machinery, addressing questions such as who is considered to be the manufacturer if a machine has been adjusted.

To receive a copy of the presentation or a recording of the webinar, contact the FEFCO secretariat (FEFCO members only).

FEFCO ACTIVITIES

NEW SYMPATHISER MEMBER

A big welcome to the new member who has joined FEFCO in 2024!

Bono Energia S.p.A.

www.cannonbonoenergia.com

Italy

Gazella Atlantique SARL

www.gazellaatlantique.eu

France

NEW FEFCO CYBER SECURITY WORKGROUP

In recent years, digital attacks on industrial enterprises have greatly increased, targeting both applications and underlying structures. This highlights the vulnerability of current trust-based security approaches in managing today's industrial information technology (IT) and operational technology (OT) systems.

In response, FEFCO has formed a new committee on cyber security, and initiated a project to establish an industry-wide standard for industrial cyber security

in the corrugated board sector. This standard aims to mitigate risks posed by increased interconnectivity, address regulatory demands, ensure insurability and certifiability, and meet end customers' transparency and compliance needs. It also seeks to streamline equipment suppliers' support for certification and security processes.

The project participants, partners and working process include the Cyber Security Workgroup, the Operations and Innovation Committee (OIC), FEFCO staff, corrugated board manufacturers and their suppliers, cyber security/IT experts, insurance companies and the paper industry. Expected deliverables will focus on outlining the implementation of a minimum subset of requirements from regulatory, compliance and customer demand perspectives. The project is planned to end in 2025.

The Cyber Security Workgroup is chaired by Hans Christian Hansen (DS Smith DK).



From left: Daniele Plazzi (FEPA), Greg Carter (eProductivity Software), Hans Christian Hansen (WG Chair/DS Smith). On screen: Talha Minty (SKG), Laura Mazzei (FEFCO). Back row: Marc Van Damme (OIC Chair/VPK), Gerald Schremser, (Prinzhorn), Laurent Bonherbe (Dunapack), Armin Kaltenbacher and Andreas Marsch (BHS), Steve Whillis (eProductivity Software), Peeters Hans-Frederik (VPK). Front row: Eleni Despotou (FEFCO DG), Houriet Lefebvre (FEFCO).

FEFCO EVENTS

FEFCO Summit 2024 Leading Circularity

15-17 May 2024

Athens, Greece

Divani Appolon Hotel

See FEFCO website

Workshop – Implementing Energy Efficiency Practices in Corrugated Manufacturing

24 October 2024

Sheraton Brussels Airport hotel

Invitations will be sent in due time.

OTHER EVENTS

MACFRUT 2024

8-10 May 2024

Rimini Expo Centre, Italy

www.macfrut.com/en/

Securfood Packinnove Europe

2-3 July 2024

Isara-Agropole, Lyon, France

<https://lyon.securfood.com/>

drupa 2024

28 May-7 June 2024

Messe Düsseldorf, Germany

www.drupa.com



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