ACTIVITY REPORT 2025

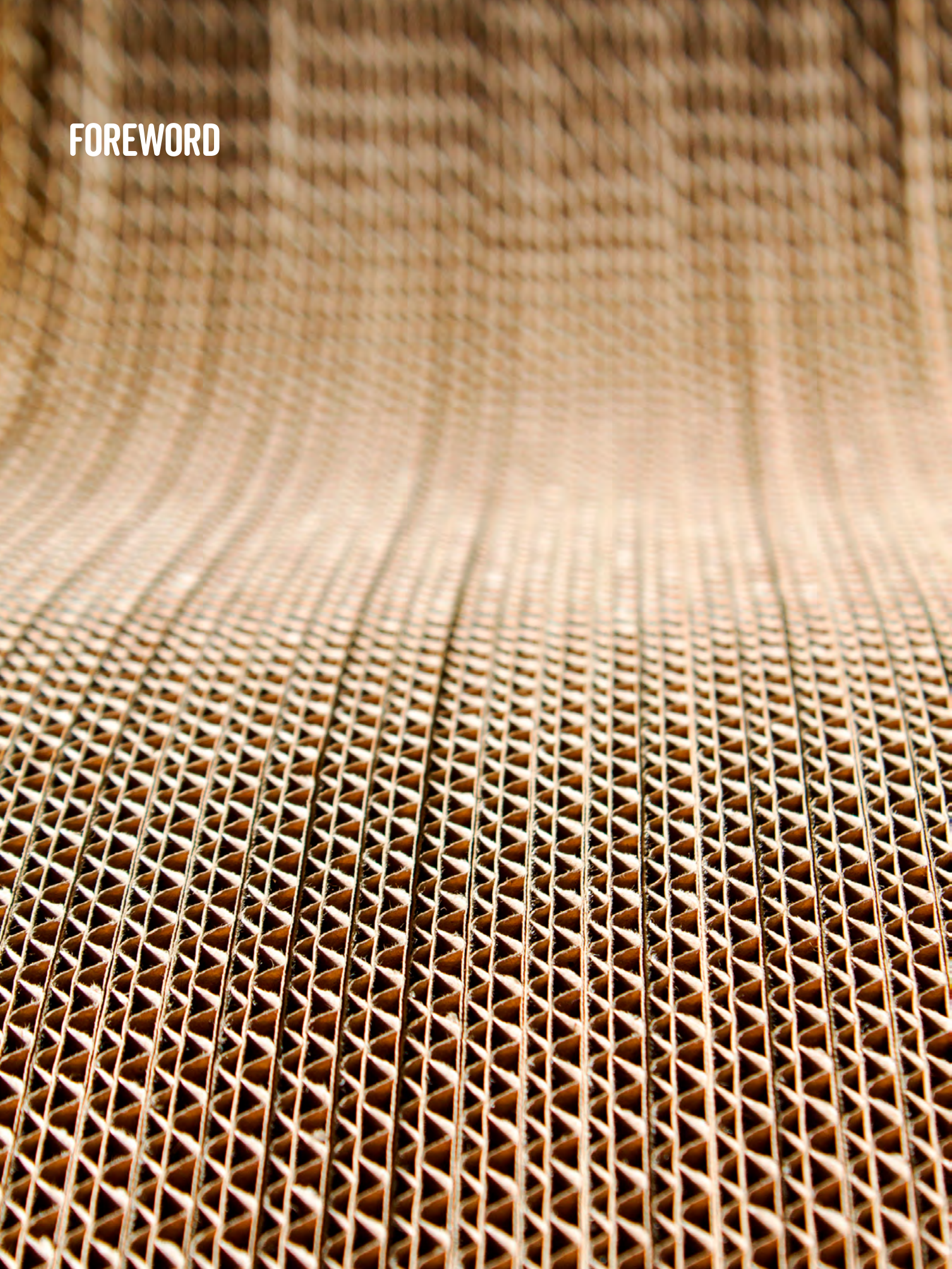


FEFCO
Corrugated Packaging

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FOREWORD





Eleni Despotou
FEFCO Director General

Turning complexity into clarity for our members

The past year has confirmed a new regulatory reality for all corrugated packaging businesses. New regulations, evolving sustainability expectations, technological developments and increasing demands for transparency are reshaping the way our industry operates. The work of FEFCO becomes even more demanding with stretched timeframes. What matters for our association is the ability to transform complexity into practical action. The real challenge is to provide valuable advice to members when legislation remains unclear and open to interpretation. This is particularly evident in the implementation of the Packaging and Packaging Waste Regulation (PPWR).

We have worked with industry experts to transform technical and regulatory developments into clear, usable guidance. The PPWR guidance documents, the EUDR Compliance Guide, the Product Carbon Footprint Checklist, the Recyclability Factsheet and the Cybersecurity Handbook are all examples of what can be achieved when industry knowledge is shared and translated into practical solutions.

At FEFCO we support science-based policy making. Through Life Cycle Assessment work, recyclability testing, carbon footprint initiatives, research projects and industry statistics, FEFCO continues to strengthen the technical foundations that allow us to engage confidently with policymakers, customers and other stakeholders.

None of these achievements would be possible without the dedication of our President, Board, committees, National Associations, member companies and partners. Their willingness to contribute expertise, challenge assumptions and work towards common solutions remains one of our greatest assets. It is this spirit of cooperation that enables our industry to respond collectively to shared challenges.

The 2025 Technical Seminar in Rome demonstrated this perfectly. Bringing together experts from across the value chain, it provided a unique opportunity to exchange ideas, share experiences and explore the innovations shaping the future of corrugated packaging.

As we look ahead, new challenges will undoubtedly emerge, often accompanied by new opportunities. FEFCO will continue to support its members through advice, recommendations and support to their business. Because in a rapidly evolving world, our collective collaboration and shared intelligence remains one of our strongest assets. By learning from one another and acting together, we can continue to turn complexity into clarity and challenges into progress.





Nina Iversen
FEFCO President

Shaping the Future Together

When I look back on 2025, I am reminded that our industry has never stood still. Across Europe, businesses have been navigating an increasingly complex landscape. New regulations, rising sustainability ambitions, economic uncertainty and the rapid emergence of technologies such as artificial intelligence are changing how we work and how we create value.

Throughout this period, one thing has become clearer than ever: no company, no country and no organisation can shape that future alone. The strength of our industry lies in its ability to come together around common goals. This is why FEFCO's role remains so important. By connecting national associations, companies and stakeholders across Europe, we ensure that the voice of the corrugated industry is heard where decisions are made and that our collective expertise contributes to policies that affect our businesses.

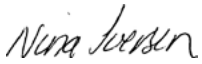
Whether addressing the implementation of the Packaging and Packaging Waste Regulation, working with partners across the value chain, or sharing knowledge through our committees and working groups, our industry has shown that cooperation is one of its greatest assets.

Policymakers, customers and society increasingly expect evidence alongside commitments. This is why the work carried out by FEFCO and its members to provide credible, science-based information on circularity, recyclability and environmental performance is so essential. Because evidence matters.

That contribution is significant. Corrugated packaging is already helping make Europe more circular, more resource-efficient and more resilient. Built from renewable materials and supported by highly effective collection and recycling systems, it demonstrates every day what circularity can look like in practice.

As we look ahead, I am confident about the future. We have strong foundations, a proven capacity to innovate and a shared ambition to keep improving. By combining the qualities that have always defined our sector, with new technologies, robust evidence and fresh thinking, we can continue to lead.

The future of corrugated packaging will not be built by one company or one organisation. It will be built collectively, by all of us. And that is why I look forward to the journey ahead with confidence and optimism. Thank you!



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 16 National Associations (active members), 13 Corresponding members and 192 Sympathiser members.

Austria
Austrian Corrugated Industry Association, Austrian Paper and Cardboard Trade Association
President: Mr. Alexander Enzenberg
Representative: Ms. Katrin Seelmann

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. Vaclav Mlynar

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

France
Carton Ondulé de France (COF)
President: Mr. Dominique Lagarde
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. Maritina Mantzanvinatou

Hungary
Hungarian Federation of Corrugated Board Manufacturers (HFCBM)
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. Thomas Zebrowski
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. Lonel Ciucioi

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. David Richardson
CEO: Mr. Alex Veitch
Executive Director - Sustainable Products: Ms. Dimitra Rappou

CORRESPONDING MEMBERS

FEFCO has 13 Corresponding members from 10 countries. Corresponding membership is open to companies located in a country that does not have a National Association member, or whose professional association is not an active member of FEFCO.

SYMPATHISER MEMBERS

FEFCO has 192 Sympathiser members from 24 countries, including 23 new members that joined us in 2025.

Membership is open to companies supplying the corrugated industry.

KEY PRODUCTION STATISTICS 2025



- Total shipments in millions of m^2 (including non-members) 2025
- Total number of corrugating plants (including non-members) 2025
- Average weight of board in g/m^2 (including non-members) 2025

Disclaimer: FEFCO receives statistical data voluntarily from national associations representing the corrugated board industry in Europe, including both FEFCO members and non-members. The data are used solely for aggregated statistical reporting and industry analysis and are handled in accordance with FEFCO applicable confidentiality and data protection principles.

KEY FACTS - FEFCO 2025 STATISTICS

CORRUGATED IN NUMBERS

Production

52

billion m² (incl. non-members)

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 320

PLANTS 590

WORKFORCE

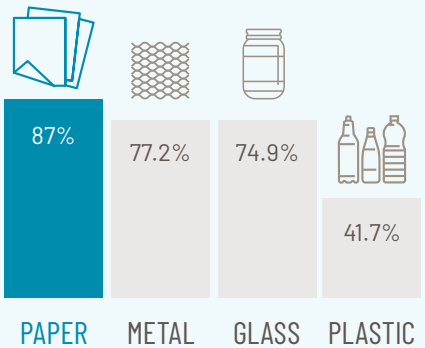
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EVERY YEAR, THE CORRUGATED CARDBOARD INDUSTRY RECYCLES

26.9 million tonnes of recycled paper, the equivalent of the weight of

2,663 Eiffel Towers in packaging! (FEFCO LCA 2023)

PAPER AND BOARD IS THE MOST RECYCLED PACKAGING MATERIAL



DATA SOURCE: EUROSTAT 2023

LCA 2023

FOR THE PRODUCTION OF CORRUGATED CARDBOARD BETWEEN 1997 AND 2023 THERE WAS:

-48%

reduction in the use of fossil fuel at mills between 1997 and 2023 (FEFCO LCA 2023)

-26%

reduction in total energy consumption at mills between 1997 and 2023 (FEFCO LCA 2023)

4×

Nearly 4× increase in the use of renewable fuels in the corrugated sector between 1997 and 2023 (FEFCO LCA 2023)

STRATEGIC VISION

STRATEGIC PLAN 2025 HIGHLIGHTS

FEFCO is the recognised voice of the European corrugated cardboard industry, bringing together expertise, innovation and collaboration to promote fibre-based packaging solutions across Europe.

Our ambition is to be a trusted partner for policymakers, industry and stakeholders, demonstrating the essential role of corrugated packaging in enabling a circular, resilient and climate-neutral economy.

Through evidence-based advocacy, technical excellence and strong collaboration across the value chain, FEFCO supports its members in navigating regulatory developments while advancing sustainable packaging solutions that benefit society, businesses and the environment.

DELIVERING ON OUR STRATEGIC PRIORITIES - 2025 HIGHLIGHTS

Throughout 2025, FEFCO translated its strategic priorities into tangible outcomes for the European corrugated packaging sector. Significant regulatory developments and continued progress towards the European Green Deal objectives shaped the year's agenda. FEFCO supported members through policy leadership, technical expertise, science-based evidence and strategic communications while promoting the role of corrugated packaging in Europe's circular economy.

Shaping Europe's packaging policy

FEFCO played an active role in the evolving European policy landscape, ensuring that the expertise of the corrugated industry was reflected in discussions surrounding the implementation of the Packaging and Packaging Waste Regulation (PPWR). The Association also provided practical guidance on the European Deforestation Regulation (EUDR) and contributed constructively to key legislative initiatives including food contact materials, eco-design, Green Claims, PFAS, product safety and broader circular economy policies. Continuous policy monitoring and close engagement with European institutions enabled timely information sharing and informed dialogue throughout the year.

Supporting the transition towards climate neutrality

Supporting members on their sustainability journey remained a core priority. Throughout 2025, FEFCO continued to promote its Climate Neutrality Roadmap while improving practical tools and guidance to support carbon footprint assessment, science-based targets (SBTi) and energy efficiency. Together, these initiatives helped members prepare for evolving sustainability expectations and contributed to the sector's long-term climate ambitions.

Strengthening knowledge and technical excellence

FEFCO further reinforced its position as a trusted centre of technical expertise by delivering high-quality research, market intelligence and practical guidance. Progress on studies covering biodegradability, compostability, recycling methodologies and Life Cycle Assessment provided valuable scientific evidence to underpin advocacy and sustainability communication. Members also benefited from regular market statistics, policy monitoring, technical updates and the publication of the Cybersecurity Handbook. The FEFCO Technical Seminar continued to foster knowledge sharing across the industry.

Promoting the value of corrugated packaging

Throughout the year, FEFCO continued to raise awareness of corrugated packaging as an essential component of a circular economy through an integrated communications programme. Targeted campaigns, media engagement, publications, conferences and digital communications highlighted the environmental performance and versatility of corrugated packaging. The launch of the monthly Unboxing Insights LinkedIn newsletter, together with continued promotion of FEFCO studies and thought leadership, further strengthened engagement with policymakers, industry stakeholders and the wider packaging community.

Supporting members and fostering operational excellence

FEFCO continued to provide practical guidance and technical support to member associations across a broad range of European policy and sustainability topics, facilitating knowledge exchange and helping members respond consistently to evolving requirements. The Association also continued its commitment to Health & Safety by sharing industry statistics, promoting best practices and supporting initiatives that contribute to safe and efficient operations across the corrugated sector.

Building partnerships for greater impact

Collaboration remained at the heart of FEFCO's work. Throughout 2025, the Association strengthened cooperation with organisations across the fibre-based packaging value chain, including ICCA, Fibre Packaging Europe, 4evergreen, the Packaging Chain Forum, the European Paper Recycling Council, Containerboard Europe and other strategic partners. Through joint initiatives and coordinated advocacy, these partnerships amplified the industry's collective voice and reinforced the role of fibre-based packaging in Europe's circular economy.

2025 ACHIEVEMENTS & PROJECTS

"At FEFCO, one of our key roles is to help members turn regulatory requirements into practical action. As PPWR moves from legislation to implementation, we are working closely with the industry experts to provide guidance, share expertise, and help companies prepare for the requirements that lie ahead. At the same time, we continue to engage with policymakers by sharing reliable data, scientific evidence and real-life industry experience. In doing so, we help develop rules that achieve environmental goals while remaining workable for businesses across Europe. Because our industry matters!"



Eleni Despotou, FEFCO Director General



PPWR IMPLEMENTATION SUPPORT

Helping members navigate new packaging requirements with greater clarity and confidence.

Following the adoption and entry into force of the **Packaging and Packaging Waste Regulation (PPWR) in 2025**, FEFCO intensified its support to members as the focus shifted from legislative negotiations to implementation and secondary legislation. Through the PPWR Taskforce and the Standardisation Taskforce, FEFCO monitored regulatory developments, coordinated industry positions and contributed to discussions on key topics such as design for recycling, reuse requirements and harmonised labelling.

FEFCO also strengthened its participation in European standardisation activities, notably within the **European Committee for Standardisation (CEN)**, helping ensure that future methodologies and technical requirements remain practical, science-based and aligned with the realities of corrugated packaging. To support companies preparing for compliance, FEFCO developed guidance documents, implementation tools and regulatory updates, while continuing to advocate for the recognition of the environmental benefits and specific characteristics of corrugated packaging.

LIFE CYCLE ASSESSMENT & CARBON TRANSPARENCY

Strengthening the credibility and transparency of environmental data across the corrugated packaging value chain.

In 2025, FEFCO continued its long-standing life cycle assessment programme and launched a new industry-wide data collection exercise based on 2024 data. A key milestone was the successful review of the CITPA CO_2 guidelines, on which the FEFCO exercise is based, against the Partnership for Carbon Transparency (PACT) framework, resulting in an overall aligned approach statement and official listing on the PACT website. This work strengthens confidence in the environmental and carbon footprint data used across the corrugated packaging value chain.

GUIDE TO EUDR COMPLIANCE



Turning complex requirements into practical guidance for the corrugated packaging sector.

A key achievement of the EU Deforestation Regulation (EUDR) Taskforce in 2025 was the development of a **sector-specific EUDR Compliance Guide** for the corrugated packaging industry. Developed in collaboration with external experts and based on extensive member input, the guide helps companies understand their obligations, identify their role in the supply chain and determine the applicable requirements. Decision trees, case studies and action plans translate the regulation into practical steps, with a particular focus on supporting SMEs and providing greater clarity on EUDR implementation.

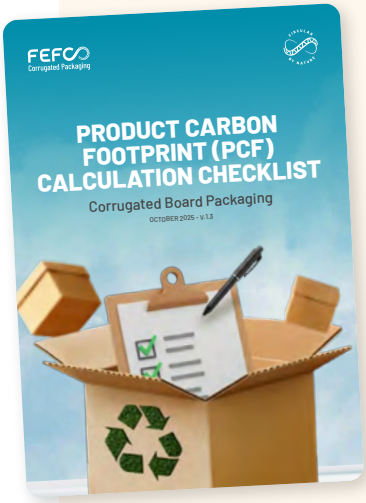
CYBERSECURITY HANDBOOK



Giving members practical tools to strengthen digital resilience.

FEFCO published the **Cybersecurity Handbook** and associated tools, providing corrugated packaging manufacturers with practical guidance to assess cyber risks, strengthen resilience and prepare for key regulatory requirements, including the **NIS2 Directive and Cyber Resilience Act (CRA)**. Developed under the guidance of the Cybersecurity Workgroup and validated by **EY**, the handbook brings together practical recommendations and best practices that members can apply within their organisations.

PRODUCT CARBON FOOTPRINT CALCULATION CHECKLIST



Helping members assess and communicate carbon footprint information with greater consistency.

FEFCO published the **Product Carbon Footprint (PCF) Calculation Checklist**, providing members with a structured approach to evaluating the robustness and transparency of product carbon footprint studies. The checklist covers key methodological aspects including **system boundaries, data quality, assumptions and allocation rules**, supporting greater consistency and comparability of PCF calculations across the corrugated packaging industry. It also helps members better understand, assess and communicate their PCF results.

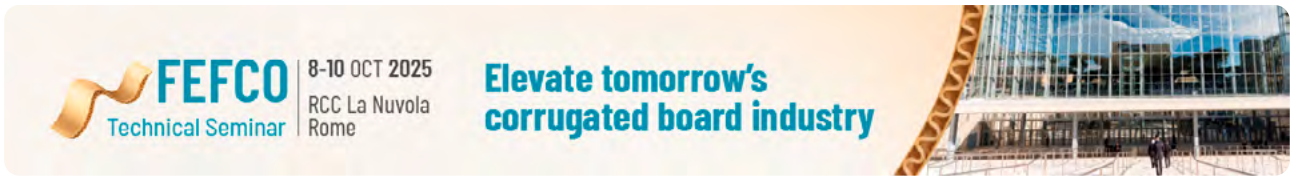
RECYCLABILITY FACTSHEET



Providing clear, evidence-based information to support the sector's circularity message.

FEFCO published a **Factsheet on Recyclability for Corrugated Cardboard Packaging**, giving members a concise reference for communicating the recyclability performance of corrugated packaging to customers, policymakers and other stakeholders.

This factsheet highlights collection and recyclability of corrugated cardboard, explains key recycling processes and provides evidence-based information on the role of corrugated packaging in the circular economy.



The 23rd FEFCO Technical Seminar, held in Rome from 8 to 10 October 2025, brought together **1,171 participants**, reaffirming its role as a leading meeting point for the European corrugated cardboard value chain. Building on more than 40 years of industry exchange, the Seminar provided a unique forum to explore the technological, regulatory and sustainability developments shaping the sector.

Under the theme **"Elevate Tomorrow's Corrugated Board Industry,"** this year's programme examined how the industry is responding to a rapidly evolving environment. Discussions addressed the growing complexity of EU regulation, changing market expectations and sustainability requirements, with particular focus on the implementation of the Packaging and Packaging Waste Regulation (PPWR) and developments surrounding the EU Deforestation Regulation (EUDR).

Technology took centre stage, with sessions showcasing practical examples of how artificial intelligence, automation and digital monitoring are already transforming operations. The discussions highlighted a broader shift towards more data-driven and efficient production, while underscoring the importance of skills, adaptability and collaboration across the value chain.

The exhibition remained a major highlight of the Seminar. With a **record 185 stands and 120 exhibitors from 35 countries**, it offered a comprehensive showcase of the latest machinery, digital tools and sustainable solutions available to the sector. For participants, it provided a valuable opportunity to connect directly with suppliers, discover emerging technologies and explore their practical applications.

FEFCO Sympathiser members, representing suppliers to the industry, played a central role throughout the event.

Their contribution extends beyond the exhibition, bringing forward innovations that support progress in areas including automation, energy efficiency and product development. The strong interaction between manufacturers and suppliers once again demonstrated the value of collaboration in advancing the sector.



Fausto Ferretti, GIFCO President

Sustainability remained a key theme, with presentations highlighting ongoing efforts to improve energy efficiency and reduce emissions. Life Cycle Assessment data continued to provide an important foundation for transparent, data-based communication on environmental performance.



Nina Iversen, FEFCO President

A new feature of the 2025 edition was a **high-level CEO panel on mergers and acquisitions**, offering practical perspectives on integration, leadership and organisational challenges in a changing global market. The Seminar concluded with the **FEFCO Awards**, celebrating innovation, technical excellence and long-standing contributions to the industry.

Overall, the Rome Seminar reflected a sector **looking ahead with confidence and purpose**, embracing technological progress while maintaining a strong focus on sustainability, expertise and collaboration.



High level panel discussion: Saverio Mayer – Smurfit Westrock, President & CEO Europe, MEA & APAC, Susana Alejandro – Saica Group President & CEO, Stefano Rossi – DS Smith, CEO Packaging Division, Jan Klingele - Klingele Paper & Packaging, Managing Partner & CEO. Moderator: Eleni Despotou - FEFCO Director General



COMMITTEE WORK

HEALTH & SAFETY COMMITTEE

H&S PANEL DISCUSSION AT THE FEFCO TECHNICAL SEMINAR

In October 2025, John Nicholls and Robert Tschullik represented the FEFCO Health & Safety Committee in the panel discussion *In Safe Hands: Collaborative Approaches Between Users and Suppliers* during the Technical Seminar.

The discussion focused on developments by machine suppliers to improve machinery safety in the corrugated industry. As hand and finger injuries remain the most common serious incidents, committee members and suppliers exchanged practical solutions to reduce risks, drawing on real accident case studies.



Panel discussion with Bobst, BHS and Fosber representatives, moderated by John Nicholls and Robert Tschullik.

The session highlighted the importance of collaboration between users and suppliers, particularly in integrating safety into machine design, improving safeguarding measures, and supporting operators through clear instructions and training. Participants also stressed the value of continuous user feedback to ensure safety innovations meet operational needs.

VISIT TO KLINGELE PLANT

In November, the Health & Safety Committee met at Klingele's headquarters and corrugated plant in Stuttgart, Germany.



Members toured the facility to observe health and safety measures in daily operations, exchange experiences with the local team and discuss best practices. The visit supported the committee's ongoing efforts to strengthen safety standards across the industry.

SAFETY ALERTS

FEFCO continued to share Safety Alerts through the members' area of its website. By communicating lessons learned from incidents and near misses, these alerts help companies identify similar risks, prevent recurrence and implement practical risk reduction measures.

SAFETY STATISTICS 2024

Safety statistics for the 2024 calendar year were distributed to members. The data, collected since 2011, show that member companies have improved their Total Recordable Incident Rate (TRIR) by more than 55% over the past 14 years.

The Committee is encouraged by the continued improvement across the corrugated industry and remains committed to supporting further progress through collaboration and knowledge sharing. The full statistics are available in the members' area of the FEFCO website.

"Thanks to the commitment and shared values of our members, injuries have been reduced by more than 55% over the past 14 years. While further improvements become increasingly challenging, the Committee remains focused on eliminating serious injuries and strengthening collaboration with suppliers. Our workshop at the 2025 Technical Seminar reinforced the industry's commitment to a safer-by-design approach."



John Nicholls
Chair Health & Safety Committee
VP Health & Safety Europe Smurfit Westrock

REGULATORY AFFAIRS COMMITTEE

PRIORITIES

In 2025, the Regulatory Affairs Committee helped members navigate an increasingly complex EU regulatory landscape. Policy priorities were based on their potential impact on the business and their probability to occur. Through advocacy, technical expertise and guidance, the Committee worked to support practical and workable outcomes for the corrugated sector.

In 2025, the top priorities were:

- EU Packaging and Packaging Waste Regulation (PPWR)
- EU Deforestation Regulation (EUDR)
- Sustainability projects

FEFCO has continued to monitor other key legislative and policy developments, including the Ecodesign for Sustainable Products Regulation (ESPR), the revision of the Waste Framework Directive, the Chemical Strategy for Sustainability and issues related to mineral oils and printing inks.

SUSTAINABILITY AND CIRCULAR ECONOMY

Packaging and Packaging Waste Regulation (PPWR)

The Packaging and Packaging Waste Regulation (PPWR) was formally published in the EU Official Journal on 22 January 2025 and entered into force on 11 February 2025, with its main provisions becoming applicable from 12 August 2026. The Regulation establishes a comprehensive framework to reduce packaging waste and improve circularity, introducing requirements on recyclability, packaging minimisation, reuse, labelling and substances of concern.





In 2025, the focus shifted to the implementation and development of secondary legislation. The European Commission launched preparatory work through expert groups and standardisation bodies, notably mandating the European Standardisation Committee (CEN) to develop harmonised methodologies for design for recycling, recyclability performance and packaging minimisation. In parallel, the Commission initiated work on implementing acts and guidance documents, including a Q&A to support stakeholders in understanding the new requirements.

FEFCO remained actively engaged throughout this phase, participating in the EU expert group on packaging and waste and strengthening its involvement in standardisation activities, including CEN TC 261. A dedicated Standardisation Taskforce was established to coordinate industry positions and contribute to the development of practical and science-based standards. This work included input on design-for-recycling criteria, recyclability assessment and the development of a "traffic light" system to support implementation.

Key regulatory topics were closely monitored and discussed with members during 2025. These included packaging minimisation requirements, which will require packaging to be limited to the minimum necessary weight and volume, and the introduction of methodologies to assess empty space ratios in transport and e-commerce packaging. Members highlighted the need for clear and workable definitions, particularly for complex packaging formats, and underlined the importance of aligning regulatory requirements with practical packaging functions.

Reuse provisions and targets were also analysed, including the development of criteria such as the number of rotations for reusable packaging. While corrugated packaging

benefits from specific exemptions in certain applications, discussions highlighted the importance of monitoring future developments and ensuring that the sector is prepared for potential implications.

On substances of concern, the Commission and relevant agencies initiated studies to identify and assess chemicals in packaging, including PFAS. Preliminary discussions confirmed that testing methodologies are under development, with early results indicating compliance for most paper-based packaging, while further investigation is ongoing for specific cases.

The introduction of harmonised EU-wide labelling requirements also progressed, with prototypes developed by the Joint Research Centre and discussed with stakeholders. FEFCO contributed to consultations, advocating for solutions that remain practical for the corrugated sector, including limiting colour requirements and ensuring cost-effective implementation.

To support members, FEFCO continued developing guidance documents and practical tools, including an overview of obligations and timelines, as well as technical guidance on recyclability and sorting. These initiatives aim to provide companies, particularly SMEs, with clear and accessible support in preparing for compliance.

Through its active engagement, technical expertise and coordination across the value chain, FEFCO continues to play a key role in shaping the implementation of the PPWR, ensuring that the specific characteristics of corrugated packaging are recognised while supporting the sector's contribution to the EU's circular economy objectives.

EUDR Taskforce

Regulation (EU) 2023/1115, known as the EU Deforestation Regulation (EUDR), aims to minimise the EU's contribution to global deforestation and forest degradation by imposing strict due diligence requirements on operators placing relevant commodities, including wood and paper-based products, on the EU market. Following ongoing political discussions and concerns raised by Member States and industry, the European Commission introduced in 2025 a proposal for targeted amendments to the Regulation, aimed at simplifying implementation and reducing administrative burdens.

The proposal introduces a number of practical adjustments, including the clarification of the role of downstream operators and traders. A single due diligence statement provided by the upstream operator at the point of entry would apply to the entire supply chain. In addition, micro and small enterprises would benefit from simplified requirements. The proposal also foresees a revised timeline, maintaining the application date of 30 December 2025 for medium and large companies, with a six-month grace period for enforcement, and postponing obligations for micro and small enterprises to 30 December 2026.



Throughout 2025, FEFCO continued to closely monitor regulatory developments and support its members through the dedicated EUDR Taskforce. Discussions highlighted a number of remaining uncertainties, including the practical implementation of the due diligence system, the role of importers in specific supply chain configurations, and the functioning of the EUDR information system, notably regarding reference numbers and customs procedures.

A key focus of the Taskforce during the year was the development of a sector-specific guidance document for the corrugated packaging industry. Produced in collaboration with external experts and based on extensive member consultation, the guide aims to support companies, particularly SMEs, in understanding and implementing their obligations under the EUDR. The document provides a structured approach, including decision trees, practical case studies, and action plans to help companies identify their role within the supply chain and determine the applicable requirements. Feedback from members confirmed the usefulness of the guide, while also highlighting the need for clarity, simplification and accessibility, including potential translations.

In parallel, FEFCO also initiated work on complementary guidance related to the EUDR information system, addressing operational challenges linked to data submission and traceability. The Taskforce will continue to update its guidance in line with further developments and clarifications from the European Commission.

On advocacy, FEFCO maintained coordination with other industry stakeholders and supported broader cross-industry initiatives, including engagement with CEPI and other sectors, to promote workable implementation conditions and ensure alignment across value chains.

PRODUCT SAFETY

Biodegradability and Compostability Study

FEFCO's biodegradability study, carried out by VTT Technical Research Centre of Finland and finalised in December 2024, confirms the natural capacity of corrugated packaging to biodegrade in different environments. The results, discussed with members in early 2025, reinforce the material's environmental performance and support ongoing communication efforts to highlight its intrinsic biodegradability.

Building on the initial study, FEFCO initiated further work on compostability to expand the results from biodegradation only. New testing was launched in collaboration with specialist laboratory ISEGA, to assess the compostability performance of corrugated packaging products. Samples were collected during the summer, with testing expected to continue over to 2026.

These activities reflect FEFCO's continued commitment to strengthening the scientific evidence base on the environmental performance of corrugated packaging, while ensuring that communication remains aligned with the sector's core focus on recycling and circularity.

General Product Safety Regulation

EU Regulation 2023/988, known as the General Product Safety Regulation (GPSR), entered into force on 13 December 2024 and replaces the previous General Product Safety Directive 2001/95/EC. As a regulation, it ensures harmonised implementation across Member States and establishes a comprehensive framework for the safety of non-food consumer products across all sales channels, including e-commerce.

The GPSR applies to all products intended for, or likely to be used by, consumers, whether new, used or repaired, and complements existing sector-specific legislation. While specific packaging requirements are primarily addressed under dedicated legislation, such as the Packaging and Packaging Waste Regulation (PPWR), the GPSR introduces additional safety-related considerations.

In 2025, discussions within the FEFCO Product Safety Committee clarified that packaging manufacturers are generally not directly responsible under the GPSR, except where packaging is placed on the market as a standalone consumer product (e.g. removal or moving boxes). In such cases, the packaging must comply fully with the regulation's safety requirements. For most corrugated packaging applications, responsibility lies with the product manufacturer or the economic operator placing the product on the market, who must ensure compliance, including carrying out risk assessments and preparing technical documentation.

Throughout 2025, FEFCO members actively reviewed the implications of the GPSR, with many companies consulting their legal teams to assess compliance requirements. A key outcome of these discussions was the agreement to develop a common FEFCO technical note to provide guidance to members. This resulted in the preparation of a briefing note summarising the regulation, its scope and its impact on the corrugated packaging sector, while highlighting the need for companies to seek case-specific legal advice.

Other policies

FEFCO also followed the legislative procedures of the Ecodesign for Sustainable Products Regulation (ESPR), the Corporate Sustainability Reporting Directive (CSRD), and the Corporate Sustainability Due Diligence Directive (CSDDD), with the aim of providing updated and background information to its members.

"In 2025, the Regulatory Affairs Committee continued to support FEFCO and its members in navigating an increasingly complex and evolving regulatory landscape. The entry into force of the Packaging and Packaging Waste Regulation marked a key milestone, shifting our focus towards implementation, standardisation and the development of practical guidance to ensure workable solutions for the corrugated sector. At the same time, the Committee remained closely engaged in other major dossiers, notably the EU Deforestation Regulation and the General Product Safety Regulation. The Committee remains fully committed to providing coordinated advocacy, clear guidance and practical tools to help members anticipate regulatory developments and adapt effectively."



Outi Marin
Chair Regulatory Affairs Committee
VP Sustainability Center of Excellence
Smurfit Westrock

COMMUNICATIONS COMMITTEE

In 2025, FEFCO's communications activities continued to build on a solid strategic foundation, further strengthening the visibility and credibility of corrugated cardboard as a circular and future-ready packaging solution. Communications remained closely aligned with advocacy priorities, while expanding outreach across digital platforms and key stakeholder groups.

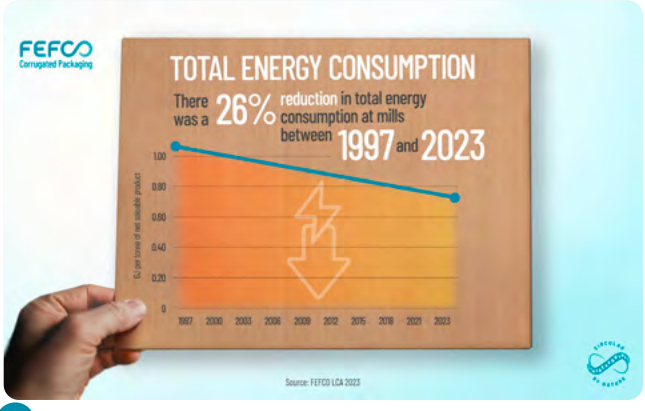
A key highlight of the year was the rollout and promotion of the "Circular by Nature" campaign. A flagship campaign video, supported by a series of short thematic clips, helped bring the industry's key messages to life in a clear and engaging way. These materials illustrated the role of corrugated cardboard in the circular economy, its contribution to local employment, and its essential function in protecting goods across European supply chains. The campaign achieved strong visibility across channels and supported a consistent narrative at both EU and national level.



www.youtube.com/@CircularByNature/videos

Throughout the year, FEFCO developed targeted communication materials linked to policy developments and sustainability milestones. Activities around key international moments such as Global Recycling Day, Earth Day, Europe Day and World Environment Day ensured continued visibility and alignment with broader EU priorities. At the same time, a new series of Life Cycle Assessment (LCA) posts provided concrete, data-based insights into environmental performance, supporting transparent and credible communication.

In addition, FEFCO continued to diversify its formats to make complex topics more accessible. New animations and short videos, including educational content on corrugated cardboard and e-commerce packaging, helped improve understanding of



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the material and its role in a sustainable packaging system. In 2025, FEFCO updated a series of visuals showcasing positive trends in key performance indicators (KPIs) from its Life Cycle Inventory (LCI) data.



Digital engagement remained a priority. The *Unboxing Insights* LinkedIn newsletter continued to grow steadily and has become an important channel to share updates on policy, industry trends and sustainability developments, combining factual content with accessible storytelling.

In 2025, FEFCO refined its digital communications strategy to adapt to evolving media and stakeholder trends. LinkedIn strengthened its position as the association's primary engagement platform, while FEFCO maintained a targeted presence on X and launched a Bluesky account to expand outreach to EU media, NGOs and trade associations.

Communications also supported key FEFCO events, notably the Technical Seminar in Rome, through live social media coverage and follow-up content that extended the event's reach and visibility.

Watch the highlights at youtube.com/@CircularByNature.

In 2025, Andrew Dando, Corporate Affairs Director at DS Smith, succeeded Alex Manisty as Chair of the Communications Committee. FEFCO thanks Alex for his valuable contribution and welcomes Andrew, whose expertise will support the continued development of FEFCO's communications and stakeholder engagement activities.

"Our priority is to strengthen FEFCO's voice through clear, compelling and evidence-based communication that resonates with stakeholders, broadens our reach and drives meaningful engagement across industry and policymakers."



Andrew Dando
Chair Communications Committee
Corporate Affairs Director DS Smith Packaging

Publications and media 2025

- Product Carbon Footprint (PCF) calculation checklist for corrugated cardboard packaging. This document provides a practical checklist for calculating the PCF of product groups.
- 27 Oct 2025 - FEFCO Factsheet on Recyclability for Corrugated Cardboard
- FEFCO Sustainability Charter
- July 2025 – FEFCO guide to EUDR compliance (European Union Deforestation Regulation)
- April 2025 - FEFCO Cybersecurity Handbook

FEFCO Blogs

Topics included:

- Corrugated wine packaging design
- Corrugated pizza liners
- Sustainable transit packaging and automotive headlights
- EcoFlower Box enables sustainable transport
- From farm to table: how corrugated keeps fruit fresh
- Elevating wine presentation with corrugated displays
- Corrugated displays put plant seeds centre stage

FefcoLink

- Issue 61 - January 2025
  Unpacking the 'Who Else?' campaign: Why corrugated cardboard stands out
- Issue 62 - May 2025
  Elevate Tomorrow's Corrugated Board Industry FEFCO 2025 Technical Seminar, Rome

Unboxing Insights newsletter

- A newsletter sent to members 4 times a year giving an overview of the main activities of the association. The newsletter was sent in March, June, October and December

FEFCO Press releases

- 31 Mar 2025 - FEFCO launches the first edition of the FEFCO Cybersecurity Handbook
- 13 Oct 2025 – Innovation, AI and sustainability take centre stage at FEFCO's 40th anniversary Technical Seminar in Rome
- 13 Oct 2025 - Corrugated champions crowned in Rome with FEFCO awards

Activity report 2024

KEY STATISTICS

- "Campaign video" supported by Google Display promotion: with over **1 MILLION IMPRESSIONS** and **125,000 YOUTUBE VIEWS**
- **AROUND 50** new communication materials (including videos, animation, static and animated assets)
- Around **320 POSTS** across FEFCO's social media channels
- More than **26 000 QUALITATIVE ENGAGEMENTS** (mentions, repost, comments, share, click to web site etc.)

48 840 FOLLOWERS at the end of 2025:

- LinkedIn: **30 150**
- X/Twitter: **14 000**
- Facebook: **2 400**
- Instagram: **1 700**
- Bluesky: **590**

14 000 UNBOXING INSIGHTS NEWSLETTER
subscribers at the end of 2025

FEFCO website www.fefco.org

- **210 000 USERS**
- **305 000 VIEWS**

"The most important thing is not to be the biggest, but to be the best – for our customers, our employees and our shareholders. That's what we're working on."



Saverio Mayer
FEFCO Vice President
President & CEO Smurfit Westrock Europe MEA & APAC

OPERATIONS & INNOVATION COMMITTEE

STRENGTHENING ENVIRONMENTAL DATA AND CARBON TRANSPARENCY

In 2025, FEFCO continued to strengthen the credibility and transparency of environmental data for the corrugated board sector. Together with CCB (rebranded Containerboard Europe), FEFCO pursued its long-standing work on Life Cycle Inventory data, building on more than 25 years of sectoral data collection and publication. In March 2025, FEFCO shared the updated Corrugated Life Cycle Inventory, covering 2022 data, following a robust process of data collection, expert evaluation, validation and independent peer review. The 2022 dataset represented a substantial share of the European corrugated packaging sector. It included data covering more than 90% of European production of semi-chemical fluting and virgin-fibre kraftliner, around 62% of production of testliner and recycled fluting made from recovered paper, and 56% of total corrugated board production in Europe.

FEFCO also launched the 2025 Life Cycle Assessment based on 2024 data, with questionnaires sent to corrugating and converting plants as well as paper mills. Preliminary findings were presented at the FEFCO Technical Seminar 2025, with expert validation and independent peer review remaining central to the process.

A key development in 2025 was the review of the CITPA CO_2 guidelines, on which the FEFCO exercise is based, against the requirements of the Partnership for Carbon Transparency (PACT) programme. The PACT programme aims to support the calculation and exchange of Scope 3 emissions data across value chains, based on existing standards such as the GHG Protocol and ISO standards. By the end of the year, FEFCO had finalised the review with an "overall aligned approach statement", and the methodology was officially listed on the PACT website.

To support practical implementation by members and customers, FEFCO also developed a one-page Product Carbon Footprint calculation checklist for corrugated cardboard packaging. This checklist aims to improve comparability, credibility and transparency when calculating product carbon footprints for corrugated packaging.

"2025 was a year of preparation and progress for the corrugated packaging industry. Against a backdrop of significant regulatory change and growing expectations on sustainability and resilience, the Operations and Innovation Committee focused on delivering practical tools and credible data for members. Major milestones included the publication of the FEFCO Cybersecurity Handbook, continued development of our Life Cycle Assessment programme, and recyclability testing to support implementation of the Packaging and Packaging Waste Regulation. The OIC remains dedicated to anticipating future challenges and ensuring members have the knowledge and tools needed to remain competitive and sustainable."



Marc Van Damme
Chair, Operations and Innovation Committee
Chief Technical Officer VPK

SUPPORTING EVIDENCE-BASED RECYCLABILITY DISCUSSIONS

FEFCO also advanced its work on the recyclability of corrugated packaging, in direct support of discussions around the development of PPWR secondary legislation on design for recycling. FEFCO adapted its Design for Recycling Guidelines into a Traffic Light Tables system, categorising parameters according to their impact on corrugated cardboard recycling: compatible, limited impact, or incompatible. This tool was designed to help producers, converters, retailers and brands specify and design corrugated packaging that can be recycled in standard paper mills.

In parallel, FEFCO carried out recyclability and sorting tests on standard corrugated packaging formats, including FEFCO American boxes, e-commerce packaging, fruit and vegetable trays, laminated trays and double-fluted samples. The objective was to assess the recyclability of corrugated packaging and provide a technical basis for discussions within the European Committee for Standardisation (CEN) working group on testing protocols.

Various laboratories and testing methods were evaluated to examine how packaging behaves under potential future standard protocols. The results were compiled into a factsheet on recyclability, made available to FEFCO members.

CYBERSECURITY WORKGROUP & STEERING COMMITTEE

ADVANCING CYBER RESILIENCE ACROSS THE SECTOR

In response to the increasing cyber risks associated with Industry 4.0 and accelerating digitalisation, FEFCO has made cybersecurity a strategic priority for the corrugated packaging industry. Under the leadership of Hans Christian Hansen (DS Smith Packaging), a dedicated Cybersecurity Working Group was established to strengthen supply chain resilience, reinforce stakeholder trust and help the industry stay ahead of evolving cyber threats and regulatory requirements.

Key 2025 achievements and deliverables

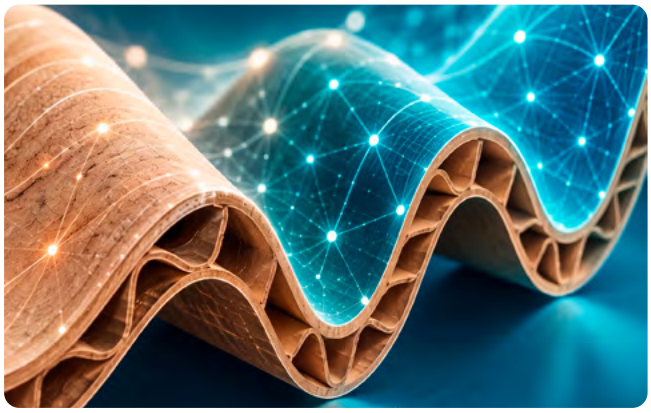
The first phase of the project focused on developing and promoting practical tools designed to strengthen cybersecurity resilience across the corrugated packaging industry:

- **Cybersecurity Handbook:** a comprehensive guide providing an overview of the evolving cyber threat landscape and its implications for corrugated packaging manufacturers
- **Cybersecurity maturity checklist:** a technical assessment tool comprising more than 100 indicators to help companies evaluate and improve their cybersecurity posture
- **Supply chain security templates:** including a Supplier Declaration of Conformity and an Interconnection Security Agreement (ISA), designed to improve security, transparency and trust in digital interactions throughout the supply chain.

Member engagement and awareness throughout 2025

To accelerate adoption and maximise the value of these tools, FEFCO launched a series of awareness and knowledge-sharing initiatives:

- **Webcasts:** launched in October 2025 and made available through Apple Podcasts and Spotify, the series featured leading cybersecurity experts providing practical insights and guidance on using the FEFCO handbook and associated tools
- **Webinar:** held on 10 December 2025, it provided practical technical guidance and cybersecurity best practices, with a specific focus on supporting small and medium-sized enterprises
- **FEFCO technical seminar:** the initiatives were presented at the October Technical Seminar, demonstrating the sector's proactive commitment to cybersecurity and highlighting efforts that go beyond regulatory compliance to strengthen resilience across the value chain.



"2025 marked the year FEFCO turned ambition into action. Working together, we provided the corrugated packaging industry with practical cybersecurity resources, including a handbook, maturity checklist and supply chain security templates. Alongside this, we drove awareness and engagement through webcasts, webinars and industry events.
Cybersecurity is a journey rather than a destination, and our work is far from complete. We remain committed to strengthening resilience across the industry through greater collaboration, knowledge-sharing, and continuous improvement.
I would like to extend my sincere thanks to all contributors whose expertise, dedication and commitment have been instrumental in the achievements of the FEFCO Cybersecurity Working Group."



Hans Christian Hansen
Chair Cybersecurity Work Group
Industrial Control System Director DS Smith Packaging

STATISTICS COMMITTEE

Building on the strong foundations established in 2024, the FEFCO Statistics Committee, chaired by Dr. Jens Neumann (Prima Verpackung), continued to strengthen the industry's statistical capabilities throughout 2025. Its mission remained focused on providing a trusted, reliable and transparent source of market intelligence to support strategic decision-making, industry benchmarking and advocacy activities across the European corrugated industry.

IMPROVING REPORT CLARITY AND DATA USABILITY

Throughout 2025, the workgroup introduced a series of improvements aimed at increasing the transparency, consistency and usability of FEFCO statistical reporting:

- **Improved data visualisation:** reporting formats were improved to distinguish between actual reported figures and estimated or extrapolated values, enabling more accurate interpretation of results
- **International standardisation:** ISO country codes were adopted across all statistical reports, aligning FEFCO reporting practices with recognised international standards
- **Membership management:** a dedicated methodology was developed to manage changes in national association membership, ensuring the consistency and comparability of year-on-year analyses despite fluctuations in the number of reporting companies.

METHODOLOGICAL ADVANCEMENTS AND KEY METRICS

The workgroup made significant progress in understanding reporting methodologies and harmonising industry terminology:

- **International benchmarking:** detailed reviews of capacity calculation methodologies used by the Fibre Box Association (FBA) in the United States and VDW in Germany were conducted to identify and incorporate best practices into European reporting frameworks
- **Terminology harmonisation:** to improve clarity and consistency, several industry terms were revised. In particular, "residual OCC" was replaced by "production losses" throughout the 2024 and 2025 reporting cycle.

GEOGRAPHIC EXPANSION AND MARKET COVERAGE

FEFCO continued its efforts to provide the most comprehensive overview possible of the European corrugated packaging market:

- Integration of non-member countries: the dynamic statistics platform was expanded to include data from non-FEFCO member countries, including Turkey, Bulgaria and Malta.
- NACE classification alignment: a feasibility study was launched to assess the alignment of FEFCO's Production by End User classification system with NACE Rev. 2.1 codes, improving compatibility with broader European economic and industrial datasets.

COMMITMENT TO COMPLIANCE AND GOVERNANCE

The workgroup maintained its commitment to regulatory compliance and sound governance practices. All statistical collection, aggregation and extrapolation methodologies continued to be reviewed against applicable EU competition and antitrust requirements, ensuring that FEFCO statistical activities remain transparent, robust and fully compliant with legal obligations.

"Our statistics provide a reliable, consistent and traceable database that enables long-term monitoring and understanding of developments in the European corrugated board industry. This is becoming increasingly important as new regulations, such as the Packaging and Packaging Waste Regulation (PPWR), influence market conditions, material flows, packaging specifications, recycling requirements and the underlying industry data, making comparable and transparent data essential."



Dr. Jens Neumann
Chair Statistics Committee
Managing Director Prima Verpackung

NATIONAL DIRECTORS COMMITTEE

PRIORITIES IN 2025

Coordination and engagement across Europe

The NDC continued to play a central role in aligning national associations on key industry priorities and strengthening cooperation across Europe. Regular exchanges ensured a coordinated approach on regulatory, technical and communication matters, while fostering the sharing of best practices between members.

Support from FEFCO President Nina Iversen

FEFCO President Nina Iversen continued to attend NDC meetings and actively supported information exchange between members, reinforcing the link between national associations and the European level. She strongly promoted the use of country reports as a tool for sharing successful projects, initiatives and experiences among members.

Visit to VDW in Berlin and Fruit Logistica

In February 2025, VDW, the German association, hosted the NDC meeting in Berlin. Oliver Wolfrum presented the situation of the German corrugated board market in the context of the country's political and economic environment and informed members about initiatives undertaken by VDW, including a tool to attract and engage new members.

National Directors also attended Fruit Logistica in Berlin, one of the leading international trade fairs for the fresh produce sector. The visit included discussions with packaging users and stakeholders, notably with DS Smith, as well as exchanges with the Dutch growers' association. These interactions provided insights into customer expectations, sustainability requirements and packaging developments in the fresh produce value chain.



Advocacy coordination

The NDC worked closely with FEFCO to ensure consistency of positions and messaging across Member States. Through regular exchanges, National Associations were kept informed of key regulatory developments and aligned on common industry priorities. Particular attention was given to the implementation of the Packaging and Packaging Waste Regulation (PPWR) and the development of its secondary legislation.

FEFCO supported National Associations with a range of advocacy tools, including position papers, studies, webinars and key arguments to support engagement at national level. These materials were used in discussions with policymakers and stakeholders, helping to strengthen national advocacy activities and ensure a coordinated industry approach across Europe.

National Directors mobilised their networks and organised meetings with authorities and industry stakeholders, contributing to a coordinated and coherent industry voice across Europe on PPWR and other key regulatory dossiers.

Communication alignment



FEFCO continued to rely on the active engagement of National Associations to amplify key messages and ensure consistent communication at national level.

In 2025, the focus was on the roll-out of the "Who Else" campaign, supported by visual assets and videos linked to key moments such as Global Recycling Day, Earth Day, Europe Day, World Environment Day and the Cybersecurity Handbook animation.



National Associations translated and adapted these materials for their own communication channels, ensuring broad dissemination of campaign messages. FEFCO also continued to share best practices and communication materials and encouraged the use of social media and digital tools to maximise outreach.

Health & Safety cooperation

Health & Safety remained an important area of cooperation between FEFCO and the National Associations. The Health & Safety Committee continued its work on accident prevention, safety performance and best practices, while the NDC ensured that this information was shared with National Associations and disseminated to member companies across Europe.

This information exchange helps to raise awareness and improve workplace safety. The information gathered also supports the dialogue between the industry and machine suppliers on accident prevention and machine safety.

Industry Statistics

Accurate industry statistics remain essential for understanding market developments, identifying trends and supporting evidence-based decision-making across the corrugated sector. Under the leadership of Dr Jens Neumann, the Statistics Committee continued to collect, analyse and share industry data from across Europe.

Country reports – structured information exchange

National Associations continued to provide country reports, supporting a more coordinated understanding of market developments across Europe. Dimitra Rappou and Janusz Turski developed a new template for the country report. These reports will be completed by all National associations once a year and include: economic indicators (GDP, inflation, unemployment), corrugated industry data (production and consumption), legislative developments, training and skills initiatives, health & safety performance, communication activities.

This structured approach facilitates benchmarking, supports knowledge sharing and strengthens evidence-based advocacy at both national and European level.

Overview of EPR schemes in Europe

National Association Directors shared detailed overviews of EPR schemes in their countries. FEFCO consolidates this information into a regularly updated overview covering EU Member States. Ignacio Carro updated members on the private EPR initiative in Spain, where more than 1,000 members have already signed up. The Spanish EPR scheme is initially for industrial packaging only.

This living document supports the identification of common principles and contributes to a coherent industry position, while serving as a basis for engagement with European institutions on EPR implementation.

Developments within National Associations

In Greece (HPPA), a leadership transition took place in 2025. Iphigenia Tarou stepped down as Secretary General in September and Maritina Mantzanvinatou took over the role. Iphigenia Tarou played a key role in establishing and developing the HPPA organisation in Greece and contributed significantly to strengthening the national network.

"In 2025, National Associations again demonstrated their value. The active exchange of information, combined with practical experience, remains essential in addressing the increasing complexity of regulatory demands and market expectations. The practical insights provided by companies at grassroots level enable FEFCO to represent the industry effectively and convincingly in Brussels."



Peter van Ostaijen,
Chair National Directors Committee



WHO'S WHO?
FEFCO & NETWORK

FEFCO GOVERNANCE

FEFCO GENERAL ASSEMBLY

FEFCO is the European federation for national corrugated board associations. Its active membership consists of 16 national associations and a number of individual corrugated board manufacturers from countries without a national association.

FEFCO BOARD OF DIRECTORS 2025

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 consists of the Board and two Vice-Presidents. Former Presidents serve on the Board in an honorary, non-voting capacity.

EXECUTIVE BOARD



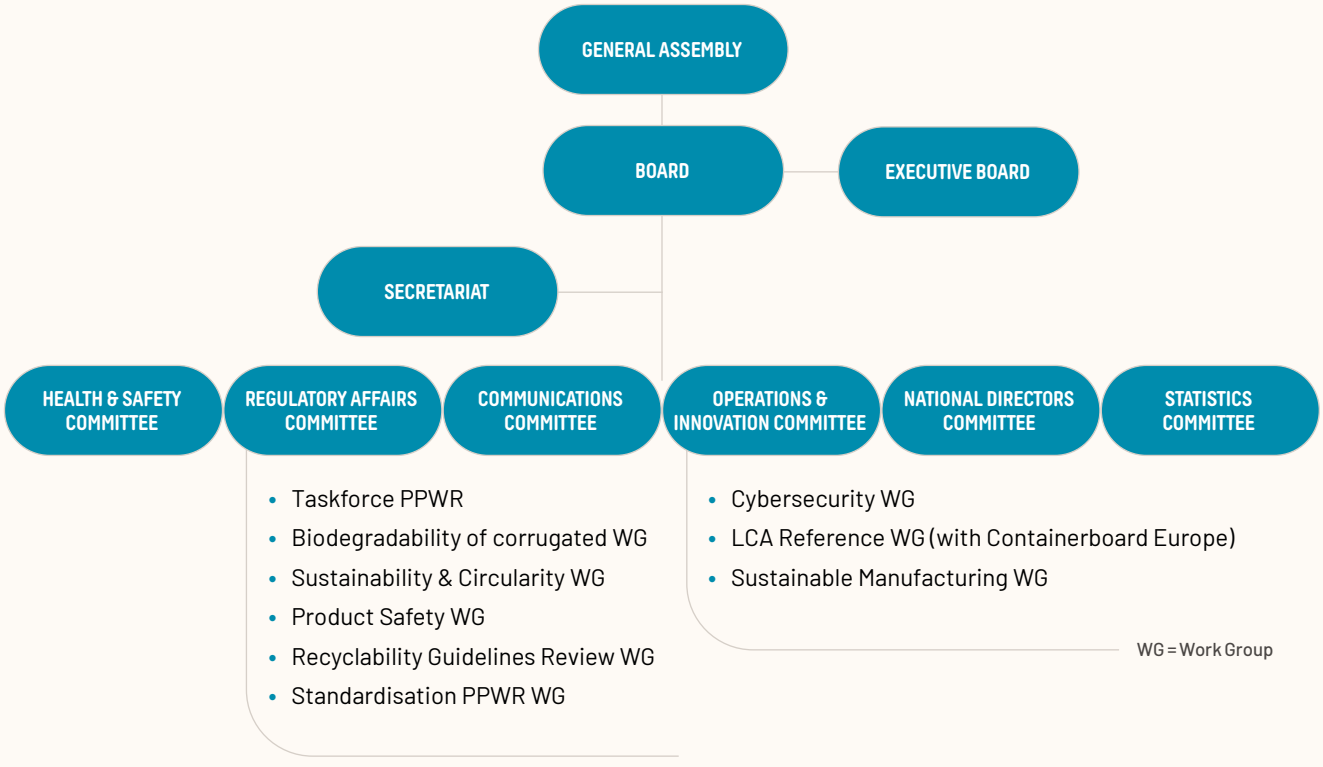
PRESIDENT
NINA IVERSEN



VICE PRESIDENT
SAVERIO MAYER



VICE PRESIDENT
LEOPOLDO SANTORROMÁN



FEFCO BOARD OF DIRECTORS 2025

EXECUTIVE BOARD

- **Nina Iversen**
  President
- **Leopoldo Santorromán**
  Vice President
- **Saverio Mayer**
  Vice President
- **Fady Gemayel**
  Honorary Vice President

MAJOR COMPANIES

- **Saverio Mayer**
  Vice President
- **Stefano Rossi**
  DS Smith Packaging
- **Paulus Goëss**
  Mondi Packaging Europe

ASSOCIATIONS

- **Dominique Lagarde**
  France (COF)
- **Fausto Ferretti**
  Italy (GIFCO)
- **John Weedon**
  UK (CPI)
- **Steffen Würth**
  Germany (VDW)
- **Thomas Zebrowski**
  Poland (SPP)
- **Leopoldo Santorromán**
  Spain (AFCO)

REPRESENTATIVES OF CLUSTERS

- **Dennis Belkovsky**
  Hungary (HFCBM), Romania (ARFCO)
- **Dirk Ockerman**
  Netherlands, Belgium (CBA)
- **Nina Iversen**
  Finland (FCBA)
  Sweden (SWIF)

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



TECHNICAL & SUSTAINABILITY DIRECTOR
JULIETTE GUERIN



SENIOR PROJECT MANAGER
HOURIET LEFEBVRE



OFFICE MANAGER
JOHANNA KLOECK



FEFCO ACCOUNTANT
ROSI DIMITROVA



SENIOR POLICY ADVISOR
MARTA ROCHE DIEZ



COMMUNICATIONS DIRECTOR (DEPUTY DIRECTOR GENERAL)
NATHALIE SCHNEEGANS



SENIOR COMMUNICATION & EVENTS ADVISOR
SAVINA CENUSE

COOPERATION AND NETWORK

INDUSTRY COOPERATION AND EU NETWORK

FEFCO maintains strong partnerships across the paper and board value chain as well as with other packaging and manufacturing associations. Through these networks, we exchange expertise, monitor developments of common interest, and coordinate positions where appropriate. This collaborative approach strengthens the industry's voice and helps address shared challenges through dialogue, knowledge-sharing, and joint initiatives at European level.

Containerboard Europe

Containerboard Europe is the European association representing producers of corrugated case materials, including kraftliner, testliner and fluting grades manufactured from both virgin and recycled fibres. Its members account for the vast majority of European containerboard production and play a key role in supplying the raw materials used by the corrugated packaging industry.

FEFCO and Containerboard Europe maintain a close and constructive partnership, reflecting the strong interdependence between containerboard producers and corrugated packaging manufacturers. Throughout 2025, cooperation continued on a range of technical, regulatory and sustainability topics of common interest, including life cycle assessment (LCA), affecting the paper and packaging value chain, food contact materials, standardisation activities and the implementation of evolving EU legislation.

PARTNER ASSOCIATIONS

CEPI – Confederation of European Paper Industries

CEPI is the European association representing the paper industry. Throughout 2025, FEFCO maintained a close and constructive partnership with CEPI on a range of policy and regulatory issues of shared interest. Key areas of collaboration included the EU Deforestation Regulation (EUDR), the Green Claims Directive, and the Food Contact Materials Regulation, among others. Both organisations also continued to work together within the Fibre Packaging Europe coalition, advocating for a coherent and supportive policy framework for fibre-based packaging.

FBA – Fibre Box Association

The Fibre Box Association (FBA) represents the North American corrugated packaging industry and works to support the sector through technical, statistical and sustainability initiatives. In 2025, FBA and FEFCO continued their longstanding cooperation on issues of common interest, including the alignment of standards and specifications for corrugated produce containers and the exchange of industry data and market statistics. FBA continued to support the international use of the FEFCO Code, the globally recognised system for corrugated packaging design adopted by the International Corrugated Case Association (ICCA). Collaboration with ICCA and the sharing of market intelligence and technical expertise remained important areas of cooperation.

JOINT ACTIVITIES AND COALITIONS

CITPA – International Confederation of Paper and Board Converters in Europe

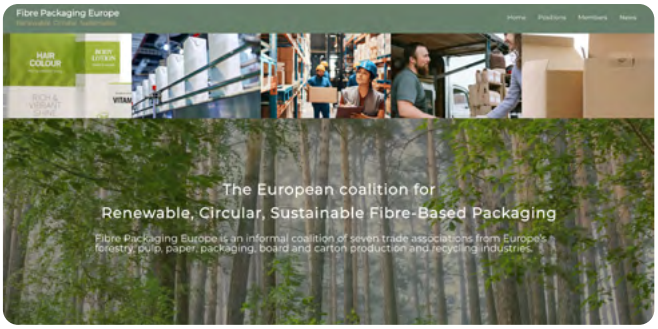
CITPA represents the interests of the European paper and board converting industry. As a longstanding member, FEFCO actively participates in CITPA's activities, providing a platform for information exchange and cooperation across the paper and board value chain. In 2025, FEFCO and CITPA collaborated on key regulatory and sustainability topics, including the Packaging and Packaging Waste Regulation (PPWR), the EU Deforestation Regulation (EUDR), Food Contact Materials and circular economy initiatives. CITPA also continued its engagement in the European Paper Recycling Council (EPRC), supporting the advancement of paper recycling and circularity in Europe.

Circular Choices for a competitive EU Bioeconomy

FEFCO is a member of the Circular Choices coalition, which promotes the role of the forest-based bioeconomy in Europe's transition towards a competitive and circular economy. In 2025, FEFCO supported the coalition's advocacy efforts and helped raise awareness of its activities and policy recommendations.

Fibre Packaging Europe (FPE)

Fibre Packaging Europe (FPE) brings together seven European associations representing the fibre-based packaging value chain, from forestry and pulp production to paper, board, carton and corrugated packaging, as well as recycling. By speaking with one voice on key policy issues, FPE promotes the role of fibre-based packaging in supporting a circular, resource-efficient and competitive European bioeconomy. In 2025, FPE continued to advocate for a supportive regulatory framework for packaging and packaging waste, contributing



to policy discussions affecting the entire fibre packaging sector.

For additional information visit www.fibre-packaging.eu.

PIJITF (Packaging Inks Joint Industry Task Force)

PIJITF brings together stakeholders across the printed food packaging value chain to address food contact materials and consumer safety issues. In 2025, the task force continued to develop common positions and technical guidance to support safe and compliant food packaging, with FEFCO actively contributing to its work.

Packaging Chain Forum (PCF)

FEFCO is a member of the Packaging Chain Forum (PCF), which brings together stakeholders from across the packaging value chain to address common policy and environmental challenges. In 2025, the forum continued to promote a harmonised EU regulatory framework, supporting the integrity of the Single Market and the transition towards a circular economy.

CSG – Cross Sector Group on food contact

The Cross Sector Group (CSG) brings together representatives from across the food contact materials value chain. In 2025, the group continued to promote science-based regulation, consumer safety and supply chain transparency, while developing common industry positions on food contact materials policy.

ICCA International CORRUGATED CASE ASSOCIATION

International Corrugated Case Association (ICCA)

FEFCO is a co-founding member of the International Corrugated Case Association (ICCA), the global network of corrugated packaging associations. ICCA supports the exchange of market intelligence, industry best practices and technical developments, while providing global corrugated industry statistics and research, including studies on the substitution of plastic packaging. The association contributes to the promotion and sustainable growth of the corrugated packaging industry worldwide.

ICCA's regional association members have been meeting regularly for more than 40 years to exchange knowledge and discuss industry developments. FEFCO holds the position of Vice President Europe on the ICCA Board.



In 2025, the ICCA Global Summit, jointly organised with the World Containerboard Organisation (WCO), took place in Osaka, Japan, from 20 to 23 May under the presidency of the Japanese Corrugated Case Association (JCCA).



ICCA Executive Board members

Cross-industry platform on the EU chemicals strategy for sustainability

This Cefic-led platform brings together representatives from multiple industry sectors to discuss and coordinate positions on the EU Chemicals Strategy for Sustainability and related chemicals legislation. FEFCO participates in the platform as part of its monitoring of chemicals policy developments affecting the corrugated packaging industry.

CheMI (European Platform for Chemical Using Manufacturing Industries)

CheMI, administered by Intergraf, is a platform representing downstream users of chemicals across a wide range of European manufacturing industries. FEFCO is a member of this cross-sector initiative, which facilitates the exchange of information and views on REACH and other EU chemicals legislation affecting manufacturing industries. In 2025, CheMI continued to advocate for science-based and workable chemicals regulation while representing the interests of downstream users at EU level.

FEFCO SYMPATHISER MEMBERS IN 2025

ABSOLUTE ENGINEERING LTD.
www.absolute-eng.com
United Kingdom

ACTEGA GMBH
www.actega.com
Germany

ADM RAZGRAD EAD
www.adm.com
Bulgaria

AFRY MANAGEMENT CONSULTING
www.afry.com
Finland

AGFA-GEVAERT NV
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