EDITORIAL

Challenging times call for unity

The current energy crisis, intensified by the evolving geopolitical situation, has resulted in skyrocketing energy prices, jeopardised security for gas and raw materials, and soaring inflation. Combined with the market and regulatory challenges set out by the Green Deal, it all makes these times more challenging than ever.

With this background, our industry needs to show unity and communicate the essential nature of packaging in preserving food and preventing both CO₂ emissions and food waste.

FEFCO continues to demonstrate the essential role of corrugated packaging in society and the economy, while in parallel dealing with the regulatory issues and promotional aspects of corrugated packaging to prevent harmful legislation. To this end, our priority remains the Packaging and Packaging Waste Directive (PPWD) which may negatively affect our markets and create additional financial and administrative burdens in the manufacturing processes.

To demonstrate that reuse packaging options supported by NGOs and policy makers are not always better for the environment than recycled ones such as corrugated, FEFCO published three studies in July.

FEFCO also organised and participated in several meetings and events with the horizon of 2050. The programme covered issues such as the Green Deal and the revision of the Packaging and Packaging Waste Directive (PPWD), as well as the corrugated industry’s pathway towards climate neutrality. The summit was also a good occasion to talk about the industry, global packaging trends, retail and customer expectations regarding packaging, e-commerce, and the challenges and opportunities for corrugated manufacturers in this new context.

The sector has agreed to elaborate a Climate Neutrality Roadmap for corrugated with the horizon of 2050. The Roadmap is being finalised and will be released in October. We trust that this project will be a further step in uniting our efforts and acting together.

Eleni Despotou
FEFCO Director General

FEFCO SUMMIT 2022
CORRUGATED BOARD PACKAGING IS FIT FOR THE FUTURE

Since the last FEFCO Summit in 2018, which highlighted the sustainability and circularity of the corrugated packaging industry, Europe and the rest of the world has seen major transformations in consumer behaviour, supply chains and environmental legislation, and has faced many crises.

FEFCO welcomed 250 participants to the summit, held in Amsterdam (18-20 May), on the occasion of the association’s 70th anniversary celebration. The conference programme focused on sustainability and carbon neutrality from the perspective of policy makers, industry, NGOs and retailers.

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“Excellent content from across industry and government perspectives - showed all sides on issues and allowed for accurate information from all parties to be shared.”

Summit participant

FEFCO President Fady Gemayel highlighted the essential contribution of the corrugated industry to society with efficiency, innovation and sustainability for tomorrow.

"Our [corrugated] boxes are alive, they are continuously brought back to life in total circularity: corrugated is recycling, corrugated is recycled, corrugated is recyclable," Gemayel said.

Dirk Ockerman, President of the Corrugated Benelux Association (CBA), the hosting organisation, opened the conference and gave an overview of Belgium’s cultural heritage and markets. He focused on the strengths of the industry.

"We have a beautifully recyclable and sustainable product that fits perfectly with the circular economy, and the ability to innovate and invest in the future," he said, "yet the industry must continue to develop new technologies."

Ilkka Lepävuori, Bain, introduced the carbon neutrality issue with Alex Manisty, Chair of the FEFCO Climate Neutrality Roadmap. They explained that the corrugated industry can reduce its footprint by 30% by 2030 and can reach net zero by 2050 if the whole supply chain works together, as an industry we create real value for customers when we solve sustainability issues with packaging.

The session continued with examples of the climate and sustainability work from the sector. Maija Pohjakallio, Metsä Group, shared the company’s vision for circular and collaborative fibre-based innovations, saying that the Circular Economy has the power to reduce greenhouse gas globally by almost 40%.

Flavio Deganutti, Klabin, Brazil, described how the industry can build for the future, from sustainable forests to packaging, stating that innovation is opening new opportunities, supporting the future growth of paper and packaging.

From the retail sector, Marion Beugelsdijk of Netherlands-based supermarket chain Albert Heijn, said the supply chain needs to address overpackaging and packaging recycling and sustainability.
“Retail wants to plan for the future and needs support from the packaging industry to find solutions meeting their recycling ambition.”

Sara Lone, Amsterdam University of Applied Sciences, shared recent data and e-commerce market development trends and provided insight into the EU challenges related to the implementation of the Green Deal.

On Day 2, high level EU officials gave insights into the EU challenges related to the implementation of the Green Deal. Tom Berendsen, European Commission (EC) executive vice president Frans Timmermans, detailed the which he presented as “an environmental plan that is also a growth strategy.” With this in mind, EU Green Deal Rapporteur for European Industrial Strategy, Saverio Mayer, stressed the need for a collaborative approach between the packaging industry and the EU. He noted that Nestlé’s net zero pledge will require the packaging industry to innovate for creative and sustainable solutions.

Corrugated is an important part of our packaging materials.”

Magdi Batato, CEO Europe for corrugated Kruger Packaging, echoed that sentiment and invited the industry to cooperate with the supply chain and society. “It is now and will remain at the core of all businesses.” He noted that “European players have been at the forefront of sustainability-driven packaging solutions; lots of net zero players get inspired by EU actions.”

Outi Marin, Chair of the FEFCO Workgroup, revealed that “our key objective is to enable the industry to innovate and effectively drive through the transformation pathway of the Green Deal.”

In concluding remarks, FEFCO Vice President J an Klingele reminded the audience of the resilience of the industry, and the value and necessity of corrugated packaging for the supply chain.
PANEL DISCUSSION

For the first time, three panel discussions, moderated by Francesca Vanthielen and highly appreciated by the participants, allowed the speakers to interact successfully with the audience. Below is a brief wrap-up of what was said.

Decarbonising the corrugated industry
Speakers discussed the challenges and opportunities for the industry on its path to net zero. Value chain players must definitely work together to make net zero a reality.

How can corrugated packaging support the FMCG/retail supply chain to improve sustainability?
Panellists agreed that packaging has a role to play to improve supply chain sustainability, but consumer behaviours are also part of the solution.

Single use, reuse, recycled: can corrugated fulfil all the expectations?
The last session triggered a lively debate around topics such as the importance of packaging for brand identity, the push for reuse, the current performance of recycled packaging options, the value and use of LCA studies, and the need for a more holistic approach at EU level.

FEFCO 70TH ANNIVERSARY

This summit was the ideal moment to celebrate the Federation's 70th anniversary.
A video setting the scene between the past and the future was shown at the start of the conference. The video replay is now available on the FEFCO YouTube page.
At the dinner, Jan Klingele, whose father was among the founders of FEFCO, gave a memorable speech on FEFCO's history. The final celebration was dessert: a custom made box-shaped cake.
At the 2022 Summit, Jan Klingele handed over the Presidency to Fady Gemayel. This ceremony had been delayed due to Covid-19 and the 2-year postponement of the FEFCO Summit.
UPDATED CORRUGATED LIFE CYCLE ANALYSIS

FEFCO, together with Cepi Container Board (CCB), has released the 2021 European Database for Corrugated Board Life Cycle Studies report.

FEFCO is proud to announce that the new CO₂ footprint for corrugated board is 491 kg CO₂ equivalent/tonne — a significant improvement of 7.5% compared to the 531 kg CO₂e/t in the 2018 assessment.

This result reflects the continuous efforts made by the European corrugated industry and its paper suppliers to reduce their impact on the environment.

Additional information, including how this result is calculated, can be found on the FEFCO website: www.fefco.org/circular-by-nature/ecodesign.

The data for the production of paper & board and conversion into corrugated boxes was sourced from the European Database for Corrugated Board Life Cycle Studies reports.
FEFCO'S FIRST HEALTH & SAFETY WORKSHOP

On 20 June 2022, FEFCO hosted a Health & Safety Workshop in Frankfurt. The workshop focused on ‘Forklift safety’ and gathered about 40 safety experts from the corrugated industry and suppliers of safety equipment. It was a thematic and very interactive gathering where participants could see and feel the new techniques and get comprehensive answers to their questions.

The event demonstrated FEFCO’s dedication to safety, and the longstanding commitment of the corrugated industry to cooperate and continuously improve health and safety and suppliers to address industry concerns and seek innovative solutions.

Forklift safety was identified by the FEFCO Health & Safety Committee as an area where high-potential accidents continue to occur when they could be prevented. The Committee acts as a platform for the corrugated industry to cooperate, exchange information and expertise, collect and evaluate safety statistics, and share good practices to improve health and safety.

The event featured presentations from Committee members and equipment suppliers. Sabine Nellen, Mondi, and Chair of the H&S Committee, presented the Committee work on safety statistics, shared info on accidents and good practices, and offered communication tools to support the industry in improving safety at work.

Nigel Elias, Smurfit Kappa, shared examples of accidents with forklifts and clamp tracks that happen on the work floor across Europe.

Andy Godbold, DS Smith, presented the Committee’s ideas for a forklift procurement standard.

Peter van Ostaijen and Erwin Heijnsbroek, CBA, shared some good practices from the Dutch association to prevent typical accidents with forklift trucks.

FEFCO is grateful to the safety equipment suppliers Linde/Comnovo, AME, Avonwood, SERRA, Vetter and TrioMobil for sharing innovative solutions to improve forklift driver and pedestrian safety on site, and prevent forklift-related accidents.

FEFCO Health & Safety Committee Chair Sabine Nellen welcoming participants

Workshop speakers and Health & Safety Committee Chair
FEFCO evaluated the environmental performance of packaging across different markets and packaging applications, through three studies:

- A peer-reviewed comparative life cycle assessment (LCA) on transport packaging
- A hot-spot analysis of the e-commerce value chain
- A white paper offering a critical view on packaging recycling and reuse in the European context

The life cycle assessment compared the transport of 3.5 ton of fresh fruits and vegetables travelling over an average distance of 840 km using recyclable corrugated boxes or reusable plastic crates (RPCs). 15 environmental footprint impact categories were evaluated for each of the packaging solutions using established databases, industry data and existing scientific literature. The study was conducted according to ISO 14040 and ISO 14044 standards. The LCA revealed that recyclable corrugated packaging outperformed reusable plastic crates in 10 of the 15 impact categories. For the Climate Change category, the corrugated box’s impact is 28% lower than that of the reusable plastic. The study also found that reusable plastic would need to complete at least 63 rotations in order to perform better than corrugated boxes on climate impact; however, the study found that the average number of reuses was 24. A sensitivity analysis was performed in the form of case studies, which evaluated the environmental impact of the packaging by changing one parameter at a time across different scenarios. It showed similar results, with corrugated performing better in 13 out of 14 scenarios.

The hot-spot analysis focused on the delivery of small personal items in Europe via the e-commerce supply chain. Using 48 existing scientific studies, the analysis identified the critical life cycle stages, also referred to as ‘hot-spots’, that account for most of the packaging’s environmental impact. The most important hot-spot identified was the real number of uses for multiple-use solutions, which proves difficult to ascertain since official data on this is unavailable. Essentially, achieving the needed number of uses will be critical to the performance of these solutions.

“Feeling confident that the FEFCO studies have reached a broad audience, including the relevant policy makers, and hope that the scientific evidence provided contributes to the development of the legislative proposal.”

Eleni Despotou
FEFCO Director General
A second key life cycle stage has to do with logistics parameters, such as complexity of e-commerce supply chains, which is not yet fully understood, meaning that their potential environmental impact is a key factor for reusable packaging to reduce its impact on the environment.

The third highest ranked hot-spot is the percentage of recycled material used in packaging recycling. The white paper provided a comprehensive overview of the packaging recycling versus reuse debate. The white paper stresses the importance of maintaining packaging functionality while improving the sustainability of the packaging material. The paper also concludes that both recyclable and reusable packaging solutions should increasingly be considered from a sustainability perspective and less from a waste prevention perspective, suggesting that the existing waste hierarchy be altered to better reflect life cycle thinking. An important outcome is that there is no obvious, de facto best choice when selecting between recyclable and reusable packaging solutions as results vary significantly on a case-by-case basis.

Since their publication, the studies have been presented to stakeholders and policymakers involved in the European Commission’s ongoing revision of the Packaging and Packaging Waste Directive, scheduled to be adopted on 30 November 2022. This legislation will introduce new measures to ensure that the development of the packaging sector aligns with the EU’s green and circular ambitions. It is possible that the Directive will be changed into a Regulation, meaning that the requirements of the legislation will be aligned across all EU member states. The revision is expected to introduce mandatory reuse targets for specific sectors, with e-commerce being one of the focus areas, and a general waste reduction target for packaging.

**How can members contribute to the dissemination of the studies?**

- Engage with FEFCO posts on the social media channels (retweet, like, share).
- Use the FEFCO communication materials on your own channels (editable files are available from FEFCO).
- Disseminate the press release to your press list.

**Why FEFCO did these studies**

In the context of the revision of the Packaging and Packaging Waste Directive, policies must encourage sustainable packaging solutions that truly contribute to waste prevention and that are fit for purpose: both reuse and recycled packaging have their role to play.

FEFCO and the industry are spreading the following messages:

- Reuse and recycling are complementary.
- Reuse can have a higher environmental impact.
- Reuse can have unintended consequences: it creates complexity in the supply chain, and requires new investments in storage, washing facilities and return logistics.
- All packaging should be fit for purpose.

**Campaign uses in various countries**

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**El cartón ondulado es mejor que el plástico en:**

El cartón ondulado es más sostenible que el plástico en tres categorías clave:

1. **Cambio Climático**: 50% menor impacto
2. **Usos de Recursos Fósiles**: 22% menor impacto
3. **28% MENOR IMPACTO**

**ACV comparativa de soluciones de embalaje alimentario**


LIRE LA SUITE...
The European Federation of Corrugated Board Manufactures (FEFCO) held a technical workshop on 11 October 2022 in Düsseldorf to discuss the recent developments and opportunities for corrugated board packaging in e-commerce.

This was the first in-person FEFCO Technical workshop since the pandemic. The focus was on a popular topic for the industry, e-commerce, which has contributed strongly to the industry’s resilience. E-commerce is here to stay: even if the recent accelerated growth slows down, corrugated packaging will continue to respond and adapt to e-tailers’ requirements.

The workshop included presentations covering the full spectrum of the features and challenges of the e-commerce packaging market, and highly interactive and lively Q&A sessions following the presentations.

The need for strong cooperation between all stakeholders, including the corrugated industry, its suppliers, customers and e-tailers, was reiterated during the discussions.

Presentation highlights

Eleni Despotou welcomed the 140 participants, and thanked the members of the Operations and Innovation Committee and its Chair Marc Van Damme (VPK) for the compelling workshop programme.

Neil Osmet (NOA Consulting) outlined how e-commerce is shaping the corrugated industry. He described what has happened since the e-commerce boom in 2020 and gave an overview of the market for e-commerce packaging.

According to NOA, e-commerce accounts for around 7% of the corrugated market in Europe.

Nick Dornheim (Eurocommerce) noted that retailers and e-tailers are closely following the EU revision on packaging waste, and expect that all packaging is 100% recyclable or reusable. He emphasised that no single company or sector can achieve this alone, adding that collaboration and cooperation with the supply chain are essential.

Roy Foden (International Paper) pointed out that design and innovation create value, and technical challenges can even lead to improved production capabilities. Packaging requirements for this channel are tough, as e-commerce packaging is handled four times more than any other types of packaging.

Astrid Glasenapp (Rise) presented the results of laboratory tests following the Amazon protocol on over-boxing, where results were compared with real-life conditions.

Johan Oude Wesselink, of Universal (BHS Group), a company specialised in systems for sheet material, presented their equipment for fanfold production. The demand for this is growing due to new e-commerce packaging.

Oliver Weinmann (Bahmüller) presented the different steps in the evolution of single-pass and multi-pass tape systems for sheet material, presented a solution incorporating the use of fanfold corrugated.
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<td>10:05</td>
<td>Challengers &amp; trend setters - How is e-commerce shaping the future of the European corrugated industry? Neil Osment, NOA PRISM</td>
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<td>10:20</td>
<td>E-commerce: Legal environment, retail expectations and corrugated</td>
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<td>10:35</td>
<td>E-commerce: Impact on corrugated product mix and design Roy Foden, IP</td>
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<td>The role of research in the development of packaging for e-commerce</td>
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<td>Corrugator: Fanfold production</td>
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<td>Q&amp;A</td>
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<td>E-commerce box production on standalone tape applicators</td>
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<td>Tape and adhesives – alternative solutions</td>
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<td>E-commerce applications in box demand</td>
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<td>Machine developments in box demand</td>
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**Event Sponsor**

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FEFCO ACTIVITIES

NATIONAL ASSOCIATIONS

Sweden
Welcome to Eva Glückman, who will represent SWIF Services AB as a member of the National Director Committee (NDC), and thank you to Pernilla Enebrink, who held the position until July.

Poland
Eleni Despotou attended the International Paper Conference and Exhibition PROGRESS 2022 organised by the Association of Polish Papermakers (SPP) in Lodz on 20 to 22 September. Kicking off the second day of the conference, Eleni highlighted the benefits achieved and progress recently made by the corrugated industry regarding sustainability. She also introduced the preliminary results of FEFCO’s Carbon Neutrality Roadmap, to be released before end 2022. Alongside this event, a paper mill visit was organised by Janusz Turski, SPP Director General.

NEW MEMBERS

A warm welcome to the new members who joined FEFCO in 2022!

- Cabot Corporation
  United Kingdom
  www.cabotcorp.com
- Kyoto Group AS
  Norway
  www.kyotogroup.no
- Norske Skog ASA
  Norway
  www.norskeskog.com

FEFCO CODE

We remind you that the printed version of the 12th edition of the FEFCO Code book is available for members and non-members. For additional information please contact FEFCO Secretariat at:

FEFCO EVENTS

- FEFCO Technical Seminar 2023
  25–27 October 2023
  Lyon Convention Centre, France

PAPER & BOARD INDUSTRY EVENTS

- Technical Seminar VDW
  14–15 November 2022
  Lufthansa Seeheim, Germany
  www.wellpappen-industrie.de
- CEPI Paper & Beyond
  Green and Resilient
  29–30 November 2022
  Marriott Hotel Grand Place, Brussels, Belgium

OTHER EVENTS

- All4Pack
  21–24 November 2022
  Paris Nord Villepinte, France
  www.all4pack.fr
- Fruit Logistica
  8–10 February 2023
  Messe Berlin, Germany
  www.fruitlogistica.com/en
- E-Commerce Berlin Expo
  23 February 2023
  Luckenwalder, Berlin Station
  Berlin, Germany
  https://ecommerceberlin.com/
- interpack
  4–10 May 2023
  Düsseldorf, Germany
  https://www.interpack.com/en

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