

Circularity IN ACTION

FEFCO SUMMIT | 27 | 29 | MAY 2026

Hotel Meliá Castilla
Madrid, Spain

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27-29 May 2026, Madrid, Spain	
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EDITORIAL



Circularity in Action: Madrid to host Europe's key corrugated packaging gathering

By **Leopoldo Santorromán**, President of AFCO and Vice-President of FEFCO

At a defining moment for the future of packaging in Europe, Madrid will become the meeting point for the industry's leading voices. Under the theme "Circularity in Action", the FEFCO Summit 2026 will bring together decision-makers from across the value chain to explore market evolution, innovation, regulation and the technological transformation shaping the sector.

For AFCO (Spanish Association of Corrugated Packaging Manufacturers), welcoming this European Summit to Madrid is both a privilege and a responsibility. Spain arrives at this event as Europe's third-largest producer of corrugated board, supported by a strong, modern and highly competitive industry that generates 26,875 jobs, €7.168 billion in turnover and 5.941 million square metres of production.

Beyond the figures, corrugated board remains one of the most compelling examples of circular economy already delivering at scale. With a recycling rate exceeding 90% in Europe and fibres that can be reused more than 25 times without loss of quality, the sector proves that circularity is not a future ambition, but a measurable industrial reality.

This is the message behind FEFCO's "Recycled for Real" campaign, which AFCO is actively amplifying in Spain through its own communication channels and professional networks, helping extend a strong and unified European narrative.

The Madrid Summit will be the ideal platform to reinforce this shared vision and to showcase how corrugated packaging continues to lead by example. We warmly encourage our members to join this important European conversation and be part of the industry dialogue shaping the future of circular packaging.



FEFCO SUMMIT 2026

Join us on 27-29 May 2026 in Madrid, Spain for three days of high-level discussions. The FEFCO Summit has firmly established itself as a must-attend event for the corrugated packaging sector, offering a unique platform to engage with industry leaders and key suppliers across Europe. Under the theme **Circularity in Action**, this year's Summit highlights the shared commitment of FEFCO and its members to continuously improve, and drive practical, forward-looking action across the sector.



Key themes include

- examining industry responses to the Packaging and Packaging Waste Regulation (PPWR), broader circularity issues and market trends;
- highlighting the corrugated cardboard industry's ongoing progress in sustainability and its practical, forward-looking actions;
- exploring the strategic challenges shaping the future of corrugated packaging, including the shared vision of industry leaders.

Venue

Meliá Castilla Hotel

C. del Poeta Joan Maragall, 43, Tetuán,
28020 Madrid, Spain
T: +34 915 67 50 00

To benefit from our special rate and help us fulfil our guaranteed room allocation, please **only book your room through the official FEFCO hotel link**.

Visit FEFCO hotel page:

➤ www.fefco.org/fefco-summit-2026/hotels

CONFERENCE PROGRAMME

The conference language is English. However, this year we are working with Wordly, an app that sends a simultaneous translation of the session to your phone or tablet, in the language of your choice.

DAY 1 - WEDNESDAY 27 MAY

16:00 - 18:00 Registrations at Meliá Castilla hotel

19:00 - 21:00 **Welcome reception**
Salón Aranjuez, Meliá Castilla hotel (Dress code: Business attire)

DAY 2 - THURSDAY 28 MAY

Moderator Naomi Lloyd

09:00 - 09:10 **Welcome address**
Nina Iversen, President - FEFCO

09:10 - 10:10 **Keynote Speech - Economical perspective - global and overview**
Professor Javier Diaz Gimenez, IESE Business School

10:10 - 10:25 **Opening speech - Welcome to Spain**
Leopoldo Santorromán, President of the Spanish Corrugated Packaging Association (AFCO)

Setting the scene 2026 and beyond

10:25 - 10:55 **The Corrugated Industry in 2026, market dynamics and trends**
Alejandro Mata, Director, European packaging and graphic paper - Fastmarkets RISI

10:55 - 11:40 Coffee break

11:40 - 12:00 **European containerboard industry: proving resilience amid change and uncertainty**
Paul van Bezouw, Director General - Containerboard Europe

12:00 - 12:20 **Trade impacts on operations and competitiveness in the paper and corrugated board sector**
Bernard Lombard, Trade and Industrial Policy Director - CEPI

PPWR Implementation - What's next? From Regulation to Reality - Challenges & Opportunities

12:20 - 12:40 **EU policy landscape - what's next? Challenges ahead (Circular Economy Act, PPWR)**
Eleni Despotou - Director General FEFCO

12:40 - 13:00 **PPWR risks assessment and corrugated industry readiness**
Filipe Vieira de Castro, Manager Recycling Intelligence - CIRCPACK by Veolia

12:40 - 13:20 **PPWR in Spain: from advocacy to implementation**
Aurelio del Pino Gonzalez, Senior Advisor - VINCES

13:20 - 13:30 Q&A Session

13:30 - 15:00 Lunch at Meliá Castilla Hotel

Corrugated Cardboard Packaging - Circularity champion

15:00 - 15:20 **The circular economy model for corrugated: new study findings**
Jules Coignard, Co-founder - Circul'R

15:20 - 15:40 **Recycling Rate of corrugated: Why the Industry Sets the Benchmark**
Juliette Guérin, Technical and Sustainability Director, FEFCO

15:40 - 16:00 **Lesson from a Spanish EPR**
Pilar Arrayás, Director - Carton Circular

16:00 - 16:20 **Corrugated packaging and circularity: insights from a life cycle assessment of environmental impacts**
Bob McIlvaine, President/CEO Fibre Box Association

16:20 - 16:30 **Q&A session**
All speakers

Evening programme

18:00 - 19:30 Departure from the hotel to downtown for a walking tour (optional)

19:00 - 19:30 Departure from the hotel for the Cocktail and Get together reception

19:30 - 20:30 Cocktails on the terrace and in function rooms Teatro Real

20:30 - 22:30 Get-together dinner at Teatro Real (Dress code: Business attire)

22:30 First bus back to the Hotel

DAY 3 - FRIDAY 29 MAY

Corrugated Packaging Sustainable, Adaptable, Smart and AI Secure

09:30 - 10:10 **How the corrugated sector can embrace an AI powered transformation**
Hans Demeyer, Senior Trainer

10:10 - 10:40 **The day your plant stops: Is your business prepared for a cyberattack?**

- Hans Christian Hansen, Industrial Control Director DS Smith Packaging
- Daniele Plazzi, Chief Innovation & Transformation Officer - FEPA
- Armin Kaltenbacher, Strategic Product Management - BHS

10:40 - 11:00 **Paperization**
Paul Jenkins, Managing Director - ThePackHub

11:00 - 11:50 Coffee break

11:50 - 12:20 **FEFCO 2026 communication campaign - recycled for real**
Speakers: Chair ComCom, Andrew Dando (TBC), Reporter, ZN FEFCO Communication agency

A Vision for the Future of Corrugated

12:20 - 13:20 **High-level panel discussion - vision for the future**

- Eric Bacourt, CEO - Hinojosa Packaging Group
- Alexander Enzenberg, Dunapack Executive
- Paulus Goëss, COO - Corrugated Solutions Mondli
- Leopoldo Santorromán Saldana, CEO - Cartonajes Santorromán

13:20 - 13:30 **Summit wrap-up and closing remarks**
Saverio Mayer - FEFCO Vice-President

13:30 - 14:30 Lunch at the Hotel

14:30 End of the Summit

SOCIAL EVENTS DURING THE SUMMIT

27 May 19:00-21:00

Welcome reception at the Melia Castilla Hotel – Madrid

The welcome reception will take place in the Salón Aranjuez at the Meliá Castilla Hotel, offering a relaxed and welcoming atmosphere to kick off the Summit. Participants will enjoy good food and drinks in an informal setting, ideal for reconnecting with peers and starting conversations ahead of the programme.

If weather conditions allow, guests will be invited to continue the evening outdoors, around the terrace and pool.

Sponsor Welcome Reception



28 May 18:00-19:30

Optional guided walking tour (1 hour) through historic areas to the Teatro Real

Join us for a relaxed guided tour through the heart of Madrid, leading from the city centre to the Teatro Real, where the Get Together Dinner will take place. Strolling through lively streets and historic squares, this walk offers a taste of downtown Madrid's atmosphere, its architecture, energy and everyday rhythm. It is an enjoyable way to experience the city and to stretch your legs after a day of conference activities. Invitations will be sent by FEFCO. Participants interested in joining the guided tour are kindly asked to register.

28 May 19:00-22:30

Cocktail reception and dinner at the Teatro Real

Summit participants are invited to a special evening at Madrid's iconic Teatro Real, located just opposite the Royal Palace. The evening will begin with a cocktail reception on the terrace and in the salon, offering a spectacular setting to enjoy drinks and conversation.

The reception will be followed by a seated dinner inside the Teatro Real, combining fine cuisine with a refined cultural atmosphere. A few short dinner speeches will punctuate the evening, alongside a flamenco music and dance performance, adding a distinctly Spanish touch before dessert is served.

19:00 Departure from the hotel by bus

19:30 Cocktails on the terrace and in function rooms

20:30 Seated dinner in the ballroom

22:30 First bus back to Melia Castilla Hotel

Dress code: Business attire



Sponsor - Get-together reception



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RECYCLING RATE: CORRUGATED CARDBOARD SETS THE BENCHMARK IN EU

Corrugated cardboard is widely recognised as Europe's material recycling champion. However, the implementation of the new Packaging and Packaging Waste Regulation (PPWR) places increasing emphasis not only on high recycling performance, but also on the accuracy, transparency and consistency of recycling rate calculations. In response, FEFCO has developed a corrugated specific methodology to better reflect the real recycling performance of the sector.

Why focus on corrugated cardboard?

Recycling rates for paper and cardboard packaging have always been reported in aggregated forms, covering a broad range of products. While Eurostat reports an overall 87% recycling rate for paper and cardboard packaging in 2023, this approach does not capture the specific contribution of corrugated cardboard. FEFCO therefore launched this study to refine existing approaches and focus explicitly on corrugated cardboard material, allowing for a more precise and policy relevant assessment of its recycling performance.

The study covers the EU 27 plus Norway, Switzerland and the United Kingdom, and applies to corrugated cardboard used for transport packaging, e-commerce, retail and display applications. Its objective is both to estimate the corrugated cardboard recycling rate and to establish a transparent methodological framework that can be replicated annually, in line with EU legislation.

A methodology aligned with EU rules

The recycling rate is calculated in accordance with Commission Decision 2005/270/EC, as the ratio between recycled packaging and packaging waste generated. Recycled packaging is defined as corrugated cardboard effectively sent to recycling, based on paper for recycling data.



The model relies exclusively on publicly available and recognised data sources, including CEPI, Containerboard Europe and Ademe. It accounts for critical parameters such as moisture content, unwanted materials, and imports and exports of both empty and filled packaging. Where data uncertainty exists, a range based approach is applied, using conservative and optimistic assumptions to define a confidence interval.

Results: a recycling rate exceeding 90% in EU

Applying this approach, the study estimates that more of 90% of corrugated cardboard placed on the European market was effectively recycled in 2023 and 2024. This result already exceeds the PPWR target of 85% for paper and cardboard packaging by 2030, confirming corrugated board's leading role in Europe's circular economy.

This strong performance is supported by long established separate collection systems, high quality and clean material streams, efficient recycling capacity at scale, and the effective reintegration

of recycled fibres into new corrugated packaging.

Credibility and policy relevance

The methodology was developed by Circpack by Veolia and critically reviewed by ifeu – Institut für Energie und Umweltforschung, ensuring robustness and transparency. Beyond the headline result, the study provides a reliable monitoring tool for industry and policymakers, supports evidence based policymaking under PPWR, and highlights future opportunities to further optimise collection and recycling systems.

By delivering a clear, replicable and EU aligned methodology, FEFCO demonstrates what the corrugated sector has long achieved in practice: closing the loop at scale.

www.fefco.org/circular-by-nature

Communication

Building on these positive results, FEFCO launched its Recycled for Real campaign on 18 March, to coincide with Global Recycling Day. The campaign showcases, through clear facts and concrete examples, the genuinely high recycling performance of corrugated cardboard.





EU AFFAIRS UPDATE

Packaging and Packaging Waste Regulation (PPWR)

The countdown to 12 August 2026 has begun, when all packaging placed on the EU market must comply with the new Packaging and Packaging Waste Regulation (PPWR). Companies will need a Declaration of Conformity for every packaging type, confirming compliance with substance restrictions, including the new PFAS limits for food-contact packaging and the 100 mg per kilogram heavy metal threshold.

They must also meet updated Extended Producer Responsibility requirements, including national registration and harmonised reporting, and prepare for new obligations on transport packaging reuse and traceability.

Published in the EU Official Journal on 22 January 2025 and in force since 11 February 2025, the PPWR replaces the former Directive with a directly applicable, harmonised EU framework. It introduces binding rules on sustainability, recyclability, minimisation, reuse and substances of concern across all Member States, creating a consistent regulatory environment for industry.

The Regulation sets comprehensive life-cycle obligations, including stricter design requirements, enhanced recyclability criteria and material restrictions. Packaging must be recyclable, with performance grades applying from 2030 and recycling at scale required from 2035. Mandatory minimisation rules prohibit unnecessary volume, and recycled content targets for plastics and new reuse obligations introduce significant adjustments across multiple sectors.

Throughout this implementation phase, FEFCO remains committed to representing the industry during the development of secondary legislation, including recyclability criteria, harmonised labelling and conformity assessment. In addition, FEFCO aims to support compliance across the sector, preparing technical guidance on Declarations of Conformity and labelling and organising a series of webinars to help members understand and meet the new PPWR requirements.

EU deforestation regulation

The EU Deforestation Regulation (EUDR) has undergone further changes since its initial postponement. While Regulation 2024/3234 delayed its application to 30 December 2025, a second postponement was adopted in December 2025, extending the deadline for large and medium operators to 30 December 2026 and for small and micro operators to 30 June 2027.

The updated rules simplify implementation. Only the operator first placing a product on the EU market must submit the due diligence statement, while downstream operators no longer need their own statements. Micro and small primary operators will benefit from a one-time simplified declaration.

April 2026 is a key milestone, as the Commission must publish a simplification review assessing administrative burdens and proposing technical adjustments. Rather than reopening the legislation, the Commission plans targeted updates through revised FAQs, guidance, and a Delegated Act amending Annex I, forming the April 2026 Simplification Package.

To support companies, FEFCO is preparing a dedicated guidance document covering obligations, due diligence steps and compliance scenarios for the corrugated sector. FEFCO is continuously monitoring regulatory modifications and will update the guidance document accordingly to ensure members remain fully informed and prepared for the new timelines.

PFAS restriction update

ECHA's work on the broad PFAS restriction under REACH advanced significantly in early 2026. On 26–27 March 2026, ECHA's scientific committees delivered key opinions supporting an EU-wide, class-based restriction that would cover more than 10,000 PFAS substances. The Committee for Risk Assessment issued its final opinion endorsing a comprehensive restriction based on the persistence, mobility and long-term accumulation risks of PFAS, while the Committee for Socio-Economic Analysis released a draft opinion now open for public consultation until May 2026.

These steps represent major progress toward the first EU-wide PFAS restriction, which would apply to manufacturing, placing on the market and use of PFAS across multiple sectors, subject to limited exemptions where alternatives are not yet feasible.

ECHA continues to evaluate the updated restriction proposal submitted by five national authorities, following extensive consultation and technical review. The final SEAC opinion is expected by the end of 2026, after which the European Commission and Member States will decide on the adoption of the restriction.

Cyber threats in corrugated packaging: Be Ready, Stay Secure!

Sheraton Hotel Brussels Airport



Following the publication of the FEFCO Cybersecurity Handbook in March 2025, FEFCO hosted a dedicated Cyber Security Day in Brussels on 17 March 2026. Sixty IT/OT experts, manufacturing leaders and regulatory specialists attended the event to address the growing and increasingly sophisticated cybersecurity threats affecting the corrugated packaging sector.

Key highlights from Cybersecurity Day

Cybersecurity and regulatory landscapes and compliance

The discussion focused on the complexity created by legislation such as EU directives, and the differences in implementation across countries. Also, our customers have different needs and questions in the area, creating significant overheads in our drive to protect our businesses.

Supply chain risk management

Speakers emphasised the importance of cyber risk management across the entire supply chain. Participants highlighted the need for stronger collaboration through a 'Shared Defence' model, where producers and suppliers adopt common frameworks

to define security expectations, monitor remote interfaces and continuously strengthen collective resilience.

IT/OT convergence in practice

This session explored the increasing convergence between Information Technology (IT) and Operational Technology (OT) supporting our never ending drive for better performance! This makes it critical that we separate / segment the technologies for example, through next-generation firewalls.

The human factor

Speakers explained that people are both the strongest line of defence as well as the biggest weakness in cybersecurity. Therefore, it is important to build a culture of awareness, preparedness and responsible digital behaviour across the entire workforce, to strengthen the entire organisation.

Insurance and risk-based audits

Cyber resilience increasingly requires continuous collaboration between companies, auditors and insurers. Risk-based audits aligned with insurer expectations, combined with robust technical safeguards, are essential for manufacturers to maintain uptime and prevent potential disruptions.

Experience sharing

The discussion provided valuable insight into what truly happened during the organisational incident and identified key learnings to be carried forward.

Emerging technologies and new threat dynamics

Defending against 'yesterday's attackers' is no longer sufficient. We see increased levels of sophistication and significantly faster methodologies from attackers. Organisations must move towards identity-centric security models and prioritise rapid detection and response capabilities. This will enable them to defend themselves against ever more advanced and aggressive threats.

While the industry has made significant progress, participants acknowledged persistent challenges such as legacy equipment, that was never designed with cybersecurity in mind. Given the cost of updating the OT estate and the complexity of securing industrial networks, continuous risk management and monitoring of the estate must be treated as part of our "licence to operate".

The day demonstrated that we stay much stronger when we cooperate and share experience across our industry and supply chain.

FEFCO sincerely thanks the Cybersecurity Workgroup and Steering Committee members, with special recognition to Hans Christian Hansen (DS Smith), Chairman and Marc Van Damme (OIC Chairman, VPK), for their leadership and contribution to the development of the Cybersecurity project.

A special thank you also to all presenters and participants whose expertise made the event a success. Together, the corrugated sector continues to pave the way towards a more secure and resilient digital future.



From left to right: Marc Van Damme, VPK - Leandro Segatto, FM - Daniele Plazzi, FEPA - Hans Christian Hansen, DS Smith - Gerald Schremser, Prinzhorn - Jeff Greene IP - Francisco Gonzalez, BOBST - Huib de Beijer, OMP - Philip Scheidl, CrowdStrike - Armin Kaltenbacher, BHS - Bernd Koberwein, BrightFlare. Not on picture: Also Andrea Ogliengo, RIOT - Yannick Scheelen, EY - Thibault Lapedagne, CyberVadis

FEFCO ACTIVITIES

New Sympathiser members

FEFCO welcomes new members:

Callens

www.callens.eu

Belgium

Messersi Packaging

www.messersi.com

Italy

Höcker Polytechnik

www.hoecker-polytechnik.de

Germany

Flexo Solutions

www.flexo.solutions

Spain

FEFCO members area

You can access the Members area from the FEFCO home page by clicking on the menu above the logo on the left-hand side.

In the FEFCO members area you can find various topics and documents including an archive of previous FEFCO events.

Please contact the FEFCO secretariat for your credentials to the Members area or if you encounter problems logging in.

Upcoming Webinar Series: "Are You PPWR Ready?"

Get ready and join our two-part webinar series for the Packaging and Packaging Waste Regulation (PPWR) coming into effect on 12 August.

- 3 June | 10:00-11:00 – From timeline to technical documentation - what you need to prepare
- 15 June | 10:00-11:00 – Latest commission clarifications, EPR developments and what's next

Please submit your questions to Marta Roche (marta.roche@fefco.org) by 15 May 2026 to ensure we cover the topics most relevant to you.

Further details on registration and question submission will be shared shortly.

FEFCO Events

FEFCO Summit 2026

Circularity in Action

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**Circularity
IN ACTION**

FEFCO SUMMIT 27-29 MAY 2026

Hotel Meliá Castilla
Madrid, Spain

Upcoming Webinar Series: "Are You PPWR Ready?"

See details on the left.

Other Events

Interpack

7-13 May 2026

Düsseldorf, Germany

www.interpack.com

Special edition by LUXE PACK

17-18 June 2026

Le Carrousel du Louvre

Paris, France

www.editionspeciale-luxepack.com

The Packaging Machinery Conference By Fachpack

16-17 June 2026 - Exhibition Centre

Nuremberg, Germany

www.fachpack.de



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