



ACTIVITY REPORT 2021

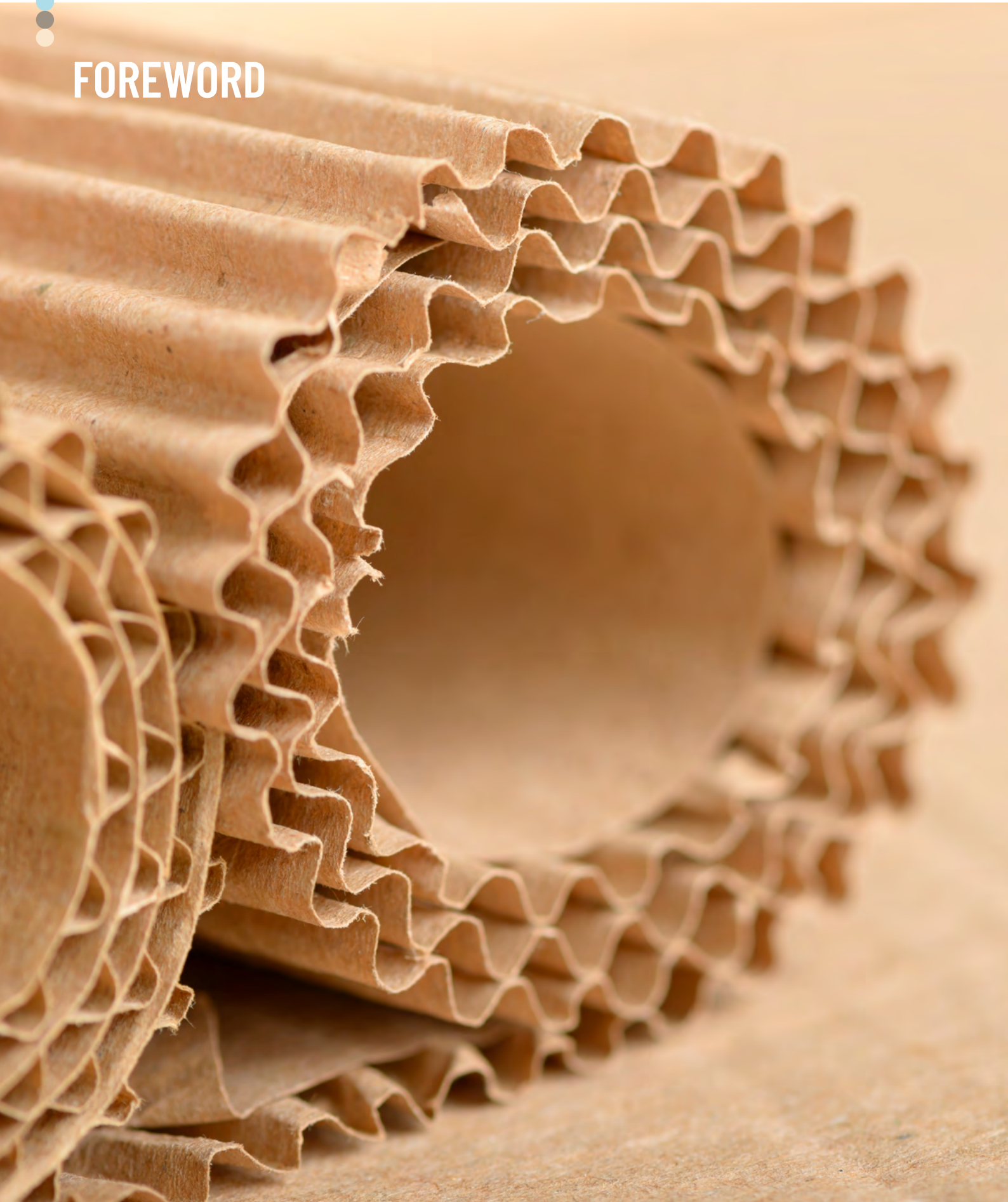


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FOREWORD





This activity report aims to inform you about FEFCO activities during last year that supported the industry challenges and policy claims.

The statutes of the association have been revised for legal

compliance, as requested by the Belgian authorities. Following the request by the FEFCO members and Board, we've created a new strategy focusing on policy and regulatory aspects, accompanied by a detailed action plan encompassing scientific intelligence acquisition to support our goals. This is a collective effort by members, the Board and the secretariat.

FEFCO also collaborated with other associations through the value chain to maximise its impact. Thus, the Fibre Packaging Europe coalition came into being last October. Its aim is to harmonise and optimise the advocacy efforts of the paper and board packaging value chain.

FEFCO is anticipating the possibility that the upcoming Directive on packaging and packaging waste could present an unprecedented threat for the corrugated industry: we are building up fact-based evidence in defence of single-use packaging products, compared to reuse, and developing an extensive campaign to reach out to all relevant stakeholders.

Climate neutrality by 2050 is the way that the European Commission foresees its future growth strategy. The FEFCO secretariat considers it a duty to guide and assist the corrugated board industry to enable climate neutrality in its manufacturing operations. Thus, an ambitious project started last year that will explore potential pathways to climate neutrality while considering all related emissions involved, including those from paper.

To promote the corrugated industry, FEFCO uses various dedicated events, technical seminars, webinars and communication campaigns to convey the benefits of corrugated, aiming to promote it as the packaging material par excellence.

I warmly thank all our member associations and companies for their continuous support to FEFCO activities by allocating resources to serve our common goals, and our President and Board for their guidance.

Eleni Despotou
Director General



Since the election of the new Board, our industry has seen very interesting growth. Of course, we have been highly impacted by the Covid-19 pandemic. Nevertheless, our industry has proved to be among the essential industries

recognised by governments. We have met the challenges of additional demand, boosted by ecommerce as well as by the revival of economic activity, and not least by the plastic bans already in place in many countries.

The focus of our members on critical issues, such as raw materials shortages and logistics disruptions, did not prevent us, as a FEFCO team, from addressing the issues we are confronted with. We have always been tagged as the recycle people; today we are putting forward our message that, while it's true that the product itself is recyclable and is made from recycled material, our process involves production of cases from recovered material in a fully circular manner. We are reusing mother nature's resources, including both recovered fibre and natural fibre, which is now also a renewable resource. Corrugated is recycled, corrugated is about recycling, and corrugated is also about reusing!

We are also addressing other challenges, from carbon neutrality to overpackaging.

We are tackling this challenge. We are also addressing other challenges, from carbon neutrality to overpackaging. We emphasise the importance of using the right packaging, and of how our product helps reduce waste, both in the global economy and the value chain. We are blessed that our sector of activity is on trend and is serving a greater purpose for society. And we are passionate about what we're doing.

I thank all our Vice Presidents and Board Members, our Director General, the FEFCO team, our National Association Directors and our members. We are on a wonderful journey together as we look forward to a brighter future for our industry and society.

Fady Gemayel
FEFCO President



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 economics, ensuring that members are continuously informed about developments that may affect the corrugated-packaging industry.

MEMBERS - BRIEF OVERVIEW

FEFCO is the European umbrella organisation of the corrugated board industry. The federation brings together 17 national associations (active members), 21 Corresponding members (corrugated board producers in countries where there is no national association) and 161 Sympathiser members (suppliers to the industry).

Austria

Austrian Corrugated Industry Association, Austrian paper and cardboard trade association

Benelux

Corrugated Benelux Association (CBA)

Croatia

Association of Croatian Corrugated Board Producers (UHPVK)

Czech Republic

Association of Czech Corrugated Board Producers (SVVL)

Finland

Finnish Corrugated Board Association (FCBA)

France

Carton Ondulé de France (COF)

Germany

German Corrugated Board Association (VDW)

Hungary

Hungarian Federation of Corrugated Board Manufacturers (HFCBM)

Italy

Italian Group of Corrugated Cardboard Manufacturers (GIFCO)

Poland

Association of Polish Papermakers (SPP)

Portugal

National Association of Paper and Cardboard Industries (ANIPC)

Romania

Romanian Association of Corrugated Cardboard Manufacturers (ARFCO)

Spain

Spanish Association of Manufacturers of Corrugated Cardboard Containers and Packaging (AFCO)

Sweden

Swedish Corrugated Cardboard Association (SWIF)

Turkey

Corrugated Board Manufacturers Association (OMÜD)

United Kingdom

Confederation of Paper Industries Ltd. (CPI)

CORRESPONDING MEMBERS

FEFCO has 22 Corresponding members from 17 countries. Corresponding membership is open to companies located in a country that does not have a national association member.

In 2021, FEFCO welcomed 2 new corresponding members.

SYMPATHISER MEMBERS

There are 161 Sympathiser members from 25 countries. Membership is open to companies supplying the corrugated industry. 12 new Sympathiser members joined FEFCO in 2021.

BENEFITS AND OPPORTUNITIES



A united and credible voice

Representing the European corrugated industry before the European Union institutions and any other relevant stakeholders, to champion the interests of the industry.



Health and safety good practice

Identifying and sharing examples of good practice in the corrugated industry.



EU advocacy

Identifying and acting on EU legislation that may significantly impact the corrugated industry.



Awareness-building communication campaigns

Promoting the benefits of corrugated board as a recyclable, renewable, sustainable, bio-based product.



Market insights and news

Identifying and monitoring strategic trends that may significantly impact the corrugated industry, and disseminating information to members.



Shaping the future

Contribute to committees and workgroups that decide on key industry actions and priorities regarding EU activities, technical topics and communication.



Knowledge sharing

Be part of a large network and join key industry events to share and get access to expertise on policy, technical and scientific topics relevant to the corrugated industry.

KEY PRODUCTION STATISTICS



- Total shipments in millions of m² (including non-members) 2020
- Total number of corrugating plants (including non-members) 2020
- Average weight of board in g/m² (including non-members) 2020

KEY FACTS

CORRUGATED IN NUMBERS



Around
50 billion m²
of corrugated board is
produced every year –
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.



89%
of corrugated packaging
is derived from recycled
content.



Corrugated board is
100% recyclable



Corrugated board is
biodegradable and
compostable.



Companies: around
380



Plants: around
650



Workforce: around
100,000

In Europe, there is 1 corrugated manufacturing plant every 200–250 km. Corrugated protects an estimated 75–80% of products transported in Europe. Corrugated packaging is renewable, recyclable and biodegradable. When new fibres are used, the wood is harvested from sustainably managed forests. In Europe, more trees are planted than cut.

(Source: Two sides)

RECYCLING & INFRASTRUCTURE

Recycling keeps materials such as paper and board alive for a long time. Corrugated is an example of the perfect cycle: used paper and board packaging are collected after use, sorted, then sent to the paper mill for recycling to become new paper and paper-based packaging. This happens over and over again.

Paper and board is collected and recycled all over Europe. There's no need to transport it back to the original manufacturer.

Effective recycling ensures that the recovered paper goes back to the economy as a resource. In Europe there's a well-established and well-functioning market for secondary raw materials and a wide coverage of recycling infrastructures all over Europe.

BIO BASED AND RENEWABLE

Corrugated packaging is made from natural and renewable resources. In addition, the new wood fibres used in the production of paper come from sustainably managed forests.

- **90.6%** of forests **owned or managed** by the European pulp and paper industry are forest management certified.
(Source: CEPI <https://sustainability.cepi.org/forest/>)
- Between 2005 and 2015, European forests grew by 44,000 square kilometres - that's an area bigger than Switzerland and amounts to over 1,500 football pitches of forest growth every day!¹

¹ Data source: United Nations Forest and Agricultural Organisation (FAO)



THE CIRCULAR ECONOMY NEEDS CORRUGATED PACKAGING

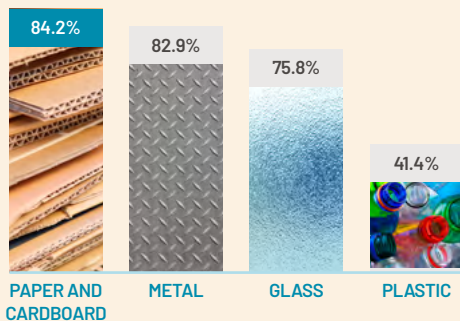
Paper packaging is recycled more than any other packaging (84.2% recycling rate; EU 27 Eurostat, 2018). By recycling corrugated packaging, the industry reuses the fibre and thus prolongs the life of its main raw material. Used corrugated is a vital raw material for the recycling industry, operating in a well-functioning internal market for high quality secondary raw materials and thus supporting the EU circular economy objectives. According to *The Myth of Limited Fibre Life Cycles*, the fibres that make up cardboard can be recycled² more than 25 times with no significant loss in quality. Another recent study, *Recyclability of carton board and carton*,³ confirmed these finding by concluding that carton can be recycled more than 25 times with little to no loss of integrity. The industry continues to innovate to ensure sustainable, safe and hygienic packaging for the future. With reuse of fibres up to 25 times without loss of integrity, and with a competitive environmental footprint, corrugated packaging is a sustainable alternative to reusable plastic containers.

From 1997 to 2018 there has been a 31% increase in the use of recovered paper per tonne of production.

Over the last 20 years, the amount of recycled material found in corrugated has steadily risen, from 73% in 1996 to 89% today.

Paper and board packaging is a recycling champion with an 84.2% recycling rate (Eurostat EU 27, 2018).

Packaging recycling rates in 2018, EU27



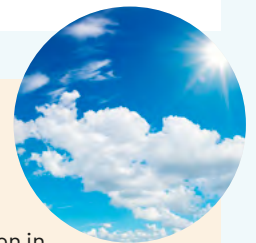
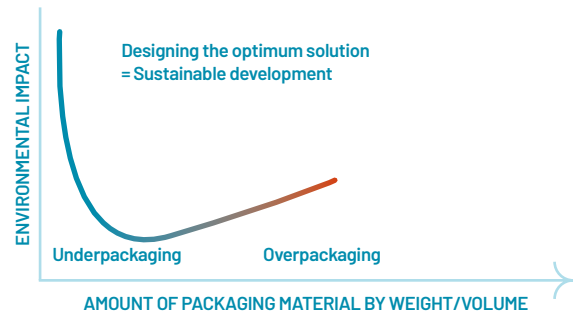
² *Wochenblatt für Papierfabrikation*, 146 (2018), No. 6, 350-357, Dr-Ing Hans-Joachim Putz, Prof Dr-Ing Samuel Schabel Technische Universität Darmstadt, Germany.

³ *Technical University of Graz*, December 2021.

FIT FOR PURPOSE AND EFFICIENT LOGISTICS

Corrugated packaging protects more resources than it uses.

Corrugated packaging can be made to any standard size, but it can also be customised to fit the product, optimising space for transport and storage, thereby reducing the number of trucks on the road.



REDUCED CO₂ EMISSIONS

Corrugated board saw a **40%** reduction in carbon footprint emissions per tonne of net saleable product between 1997 and 2018.



SAFE AND HYGIENIC

Corrugated packaging is hygienic, extends the shelf life of fruits and vegetable and reduces food waste.

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



ABOUT FEFCO

MISSION

FEFCO is the voice of the corrugated industry, serving to inform, promote and defend the industry's interests in Europe.

Its goal is to be ranked amongst the most credible and effective trade associations in Brussels, while promoting corrugated as the preferred packaging solution.



2021 TO 2022 STRATEGY AND PRIORITIES

ADVOCACY WORK

- Advocacy campaign
- PPWD (Single use)
- Food contact
- Mineral oil
- Sustainable product initiative
- Green claims

PROMOTION, COMMUNICATION, REACHING OUT TO STAKEHOLDERS

- Communication campaign in line with advocacy messages on single use
- Continuous promotion of benefits

HEALTH & SAFETY TECHNICAL, PRODUCTION WORK

- Health & Safety (statistics, workshop)
- FEFCO Code of Design
- FEFCO LCA 2021 update

CLIMATE NEUTRALITY ROADMAP

EVENTS - PLATFORM FOR MESSAGES

MONITORING, ACTIVITY REPORTING

Alliances and coalitions

Mirroring FEFCO work
National associations

Companies

VISION

FEFCO's mission is to champion the common interests of its members across Europe and to improve the visibility of the corrugated board industry. FEFCO provides a variety of services, useful information and technical expertise to facilitate the work of its member companies.

Members count on FEFCO's support to promote corrugated board as the preferred packaging option, but also to highlight the need for change.

In a fast-changing world, the energy transition and industry transformation challenges imposed by the EU Green Deal, coupled with the increasing complexity of European legislation, make it necessary to rethink and readjust FEFCO's priorities.

Focusing on policy developments while remaining connected to the value chain organisations, including CEPI and CEPI ContainerBoard (CCB), are of paramount importance.



Members' involvement, alignment and support is key for the success of FEFCO strategy. This is a collective work, addressing overall corrugated industry challenges.

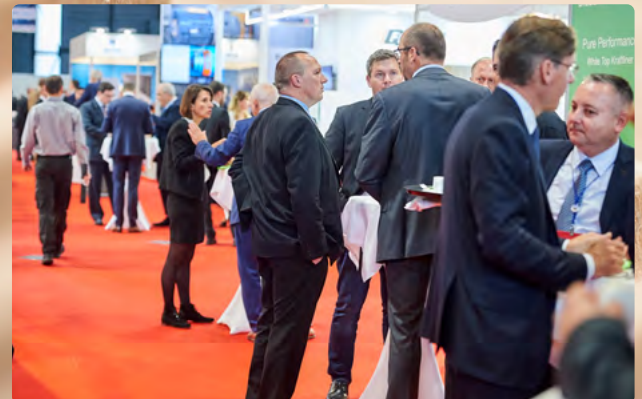
Eleni Despotou
FEFCO Director General



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FEFCO ACTIVITIES

- Represent the European corrugated industry to the European institutions and any other relevant stakeholders.
- Promote the benefits of corrugated board as a recyclable, renewable, sustainable, bio-based product respecting the EU Green Deal principles and aiming to reach carbon neutrality by 2050.
- Offer expertise on policy, technical and scientific topics relevant to the corrugated cardboard industry.
- Promote best practices in health and safety.
- Serve its members by collecting and disseminating valuable information across the corrugated packaging industry as well as to key stakeholders.
- Share experience and knowledge among members through the organisation of events such as the Technical Seminar (a unique European platform for sharing corrugated technical expertise), summit, workshop and policy events.





DELIVERING ON PRIORITIES 2021

2021 was an exciting and challenging year. The FEFCO Secretariat built further on past successes, especially in the areas of advocacy, promotion and communications. The highlight of the year was the agreement on the new FEFCO strategy, focusing on making policies that create a favourable environment for the corrugated industry. The increased regulatory complexity requires more efficiency, flexibility and preparation.



KEY ACHIEVEMENTS 2021

The **European Green Deal** dictates a transformation of society towards green, sustainable, and circular development, aiming to reach climate neutrality by 2050. All the upcoming legislation that will affect our activity will be conditioned by it. Notably, the revision of the **Directive on Packaging and Packaging Waste** (PPWD) constitutes the most challenging matter for our industry today.

New projects

To respond to the key industry challenges, FEFCO initiated two major projects.

- **Research on single use.** This includes three work packages: **comparative LCA, hot spot analysis** and **a white paper.**

- **Decarbonisation of corrugated packaging.** This project will require strong alignment with policy work, technical projects and communication to maximise the results.

Together with our member associations and experts from member companies, FEFCO is ready to speed up the deployment of the strategy while building on robust, fact-based elements.

Public Affairs

In 2021, FEFCO provided practical support, information and guidance to members on EU policy, including regular information in the EU monitoring brief, notably:

- Environmental labelling legislation in Italy
- EU Directive on Single-Use Plastics (SUP)
- EU Fit for 55 package

- New European climate law
- PPWD: brief from a workshop
- EU deforestation law proposal
- EU forest strategy for 2030
- EU taxonomy for sustainable activities
- Extended Producer Responsibility (EPR): overview

FEFCO participated in several public consultations organised by the European Commission and released many position papers related to EU initiatives.

- PPWD review
- Food waste, under the Waste Framework Directive (WFD)
- EU forest strategy
- Safe and sustainable-by-design initiatives
- Sustainable products initiative

- Food contact materials legislation review
- EU and WTO notifications on the German Mineral Oil Ordinance
- One substance – one assessment (OSOA) position as part of the EU chemical strategy for sustainability

Delivering practical and technical support

- Launch of FEFCO **Recyclability Guidelines**
- FEFCO **testing methodology for printed corrugated board in food contact**
- Update of the life-cycle analysis (LCA) database / Capi ContainerBoard (CCB)
- Revision of the **FEFCO code of design**



Successful events despite the pandemic

First, the Hybrid **Technical Workshop, covering** Monitoring & Quality Control in a corrugated plant, **took place on 23 February 2021.**

Despite the Covid-19 uncertainty, an impressive number of participants attended the **Technical Seminar from 20-22 October 2021 in Copenhagen.**

In 2021, FEFCO also began preparing the **2022 FEFCO Summit (18-20 May 2022).**



Online communication and synergies with National Associations

- FEFCO built a strong network with almost 29,000 followers on its different online channels, putting FEFCO in a position comparable with other, larger industry federations.
- FEFCO strengthened its high-level followers base with key Commission accounts, MEPs and other influential stakeholders.
- FEFCO disseminated campaigns more broadly thanks to national associations that helped by sharing and translating messages into national languages.
- FEFCO enriched its communication with valuable materials from members and incorporated them into campaigns (interviews, studies, national PR activities).

Stronger cooperation with the value chain

- FEFCO is a founding member of the Fibre Packaging Europe coalition, which brings together the paper packaging value chain associations, joining forces to optimise efforts for efficient advocacy.
- FEFCO continues to cooperate with other paper and board converting associations under the umbrella of CITPA, aiming to have one strong and unified voice towards the European institutions.
- FEFCO cooperates with other associations and stakeholders in the wider supply chain. As part of this cooperation, we signed nine joint position papers.
- FEFCO chairs the Packaging Inks Joint Industry Task Force (PIJITF – packaging, inks, adhesives, printers, food industry) and is also an active member in several other groups (see list on page 26: FEFCO Partnerships).



FEFCO ACTIVITIES – KEY ACHIEVEMENTS

2021 PROJECTS

FEFCO SINGLE USE PROJECT

FEFCO initiated a study on single use, to gather evidence on the environmental impact of single-use corrugated boxes and to challenge the Commission's position on reuse, which is considered utopic. Final discussions are taking place between the FEFCO Steering Group and the consultants, and the project is on track to be finalised by Q1/2022. An internal webinar to present the results of the study to members will be held on **15 March 2022**.

“The Single Use Project was prompted by the packaging legislation review and the need to advocate for our product. Our preliminary results show that fit-for-purpose corrugated packaging has a strong position in delivering the EU Green Deal and we can proudly promote it.”



*Outi Marin
Chair of Sustainability &
Circularity workgroup*

FEFCO CLIMATE NEUTRALITY ROADMAP

Driven by the EU Green Deal and its implications, the aim of this project is to establish a pathway towards an envisioned decarbonised economy, and a plan that can be implemented by FEFCO members. This exercise will require gathering evidence (facts and figures) to develop a comprehensive



report to demonstrate that corrugated packaging is the preferred sustainable packaging, complying with the EU ambition for a decarbonised economy by 2050.

In order to move forward rapidly and efficiently, the workgroup is composed of a Steering Committee and an Expert Group of specialists in energy, climate neutrality or sustainability.

“FEFCO wishes to present the corrugated packaging industry as a willing and capable member of the future decarbonised economy in Europe, and the roadmap will therefore be framed as a credible plan that can be implemented by all our members, large and small. Our ultimate objective is to demonstrate that our industry, working with its partners in the supply chain, intends to invest over the coming years to provide carbon neutral products that will continue to be widely recycled, thus neutralising much of the force of the reuse argument.”



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

REVISED FEFCO CODE

The FEFCO Code book is the internationally applied system for corrugated board packaging design. It describes packaging construction with distinct codes and designs enabling customers and paper packaging manufacturers to communicate clearly with each other. Originally developed in 1961, the content has been updated as a user-friendly, interactive PDF with an overview page for each series, distinguishing new from existing codes.

“The FEFCO Code is the bible for many packaging designers used across the globe. The 2022 update contains new design styles and is an interactive version developed thanks to the contribution of all workgroup members.”



*Julian Pachniewski
Chairman FEFCO Code
Revision workgroup*



COMMITTEE WORK



HEALTH & SAFETY COMMITTEE

SAFETY STATISTICS

FEFCO's Safety statistics overview 2020 was completed in July 2021 and sent out to participating European companies.

WORKSHOP

The workshop on Forklift truck safety is postponed to 20 June 2022 due to Covid-19.

MACHINE SAFETY – MAINTENANCE CHECKLIST

A maintenance checklist for machine safety was developed with the objective to support plants in preparing safe machine maintenance procedures for employees.

“In 2021, we have cooperated as an industry to improve health & safety standards and knowledge in our business. We have done this by working together, exchanging information, statistics, learnings and expertise from incidents and sharing safety good practice to support the corrugated industry’s safety improvement. We are also putting together a safety workshop specifically on forklift truck safety.”



*Stefan Buchner,
Chairman Health &
Safety Committee*

GOOD PRACTICE – CORRUGATOR GUARDING

The H&S Committee has developed a good practice document *Corrugator Guarding and Safe Working Practices*, which includes an inspection checklist and is available in the members section of the FEFCO website.

TEMPLATE FOR COMMUNICATION WITH MACHINE SUPPLIERS

The H&S Committee has developed a template tool for communication with machine suppliers. The template is sent via national associations to member companies and machine suppliers, advising them to use it in case of machine-related incidents. The aim is to communicate the identified safety issues to other operators using the same machine in order to prevent accidents.

REGULATORY AFFAIRS COMMITTEE

FEFCO PRIORITIES

FEFCO identified the Directive on Packaging and Packaging Waste (PPWD) and the Framework Regulation on food contact materials as top priority EU legislation for 2021. FEFCO actively engaged with policymakers and stakeholders to defend the interests of corrugated in the context of the legislation.

The RAC continued to closely follow all EU legislation and policies that have an impact on the corrugated industry.

In addition, FEFCO submitted feedback to several EU public consultations and took part in a number of joint industry initiatives.

DIRECTIVE ON PACKAGING AND PACKAGING WASTE

The review of the PPWD has been delayed until mid-2022. This remains the number one priority for FEFCO. Throughout the entire 2021, FEFCO has continued to actively engage in the revision of this Directive.

- Providing comments on public consultations and the workshops including the one organised by the consultant Eunomia, held in June 2021. A brief was also communicated to FEFCO members. All positions are available on the website.
- Organising meetings with the Commission and the consultant Eunomia, and participating in joint industry initiatives.
- Co-signing joint industry letters asking the Commission to conduct a proper impact assessment and to adopt harmonised labelling for packaging.
- Creating a summary of the extended producer responsibility requirements in countries.

SUSTAINABLE PRODUCTS INITIATIVE

FEFCO was actively engaged in this legislative development. In cooperation with the new informal coalition, letters were sent to the consultant and relevant Commissioners. The EC legislative proposal on the initiative has been delayed to Q1/2022.

MINERAL OILS

FEFCO commented alongside Cepi and the paper value chain on the notifications done at the EU and WTO. The German Mineral Oil Ordinance is expected to be adopted in 2022. FEFCO is initiating discussions with value chain partners, including CCB, to prepare an implementation strategy.

DIRECTIVE ON SINGLE-USE PLASTICS

The Commission continued working on the delegated acts. Alongside the Fibre Packaging Europe (FPE) coalition, FEFCO sent letters to national governments asking them to support the weight-based methodology for calculating plastic content of single-use items.

FOOD WASTE

FEFCO responded to the EU public consultation on the food waste reduction targets. This was part of the broader review of the Waste Framework Directive, expected in 2023. The FEFCO paper

“Our mission in the RAC is to follow up on European policy developments and act when necessary to protect the interests of the corrugated industry. The committee aims to best defend the corrugated industry interests by focusing on the major threats, i.e. advocating to prevent a ban on single use, promote recycling and prevent binding reduction targets for packaging. In 2021, to increase the committee’s efficiency and optimise the industry experts’ time, two dedicated workgroups were organised to focus on specific topics: product safety, and sustainability and circularity.”



Marcello Pezzi –
Chairman, Regulatory
Affairs Committee (RAC)



© EU

outlined the advantages of packaging in the fight against food waste, specifically highlighting the recyclability and sustainability of corrugated packaging.

FOOD CONTACT

FEFCO provided a joint position on the Commission’s impact assessment on the revision of EU rules on food contact materials. The FEFCO paper stressed the importance of a unified approach across the EU to ensure a level playing field for all materials. Additionally, FEFCO initiated a paper as part of the PIJITF on the ‘one substance – one assessment’ principle. PIJITF is in the process of organising a meeting with representatives from the Commission to discuss it.

DEFORESTATION AND FOREST DEGRADATION

In November 2021, the Commission published the proposal for a Regulation on commodities and products associated with deforestation and forest degradation. Corrugated and other paper packaging fall within the

categories of derived wood products and are therefore in the scope of the legislation.

EU FOREST STRATEGY

The Commission published the new EU forest strategy in July 2021 alongside the Fit for 55 legislative package. The strategy aims to improve the quality and quantity of EU forests and contribute to a sustainable and climate neutral economy. FEFCO informed members on this initiative and will continue to follow it. FEFCO also contributed as part of CITPA by signing a joint paper prepared with Cepi regarding the release of the strategy.

RECYCLABILITY GUIDELINES

FEFCO has recently published [Corrugated Packaging Recyclability Guidelines](#). They aim to assist retailers, brands and corrugated companies to specify and design packaging that can be reprocessed in high volume paper mills with current standard pulping technology.



COMMUNICATIONS COMMITTEE

ComCom provides strategic directions for the communication plan and ensures that messages and strategy are consistent with FEFCO overall objectives and missions. It also supports FEFCO advocacy efforts with facts, figures and positions.

INCOMING COMCOM CHAIRMAN

In December 2021, FEFCO and the committee members welcomed Alex Manisty as the new chairman of the Communication Committee, replacing Gary Saunders. The committee members thanked Gary for the excellent work done under his leadership since 2016. Members greatly appreciated the time and energy he dedicated to drive the mission of the committee forward.

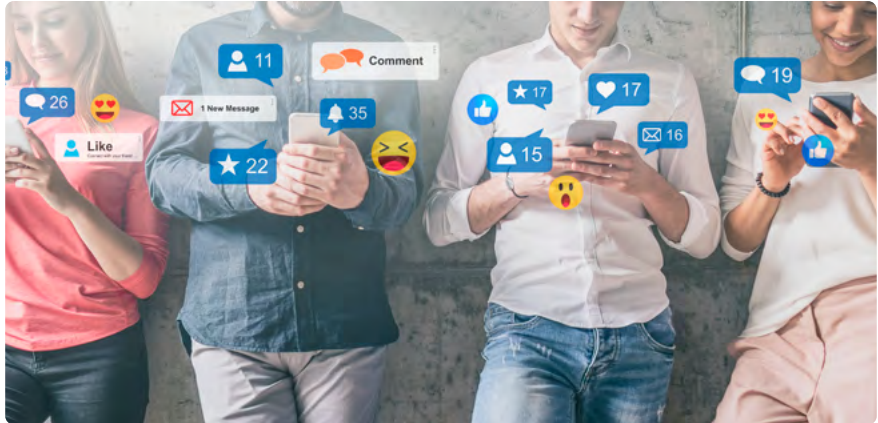
COMMUNICATION AND ADVOCACY STRATEGY

ComCom will provide input on the communication and advocacy strategy

“The priority topics are carbon neutrality and the misconceptions about single-use packaging. The committee’s aim is to build an appropriate dialogue and make sure corrugated remains the preferred sustainable packaging solution.”



Gary Saunders – Chairman (2016-2021), Communications Committee (ComCom)



to disseminate the findings of the single use project and to support the advocacy efforts on single use vs. reuse. It will help to develop the right messages and advise on the communication activities and media work, and to align members companies and national association towards the same goal.

- High-quality follower base (12 DGs, 11 MEPs, 2 Vice Presidents (EP) and department, intergroup and other top EU profiles)
- Weekly monitoring and online engagement with some key stakeholders (EU institutions and other influential organisations)

FEFCO #DELIVERON CAMPAIGN AND SOCIAL MEDIA ACTIVITIES IN 2021

- High post frequency for increased visibility, with **3235 posts in total** (including retweets/ reposts)
- Increasing number of followers: **29,000 followers** in 2021 (Twitter, LinkedIn, Facebook and Instagram)
- Visually appealing communication materials for high impact: around **80 new visuals** (high quality images and gif animations)
- High reach: **22.9 million impressions** on all channels

Main topics posted

- Special days: Valentine’s Day, Global Recycling Day, Mother’s Day, Earth Day, #WorldEnvironmentDay! WorldFoodSafetyDay, World Food Day
- Covid-19 related posts and corrugated’s essential role
- Circularity of corrugated including reuse of corrugated fibres, 25 times
- FEFCO LCA visuals showing improvements over a period of 15 years
- Coverage of the online FEFCO Technical Workshop (February 2021) with many interesting insights on process control in corrugated plants





PET fruit punnets were replaced with corrugated cardboard in Germany, the annual CO2 emissions generated in the production of fruit punnets could be reduced by 34%.

CEPI #GREENSOURCE CAMPAIGN

The CEPI campaign complements the FEFCO one. The key #GreenSource themes consisted of principally 3 pillars: sustainable raw material, responsible industry and climate friendly products.

FEFCO was recognised as a top multiplier of the CEPI #GreenSource campaign thanks to its regular dissemination of all the tweets and posts.

COMMUNICATING TO FEFCO MEMBERS

- FEFCO EU monitoring – weekly (since 2021).
- FEFCO press clippings – monthly (market trends monitoring).
- FEFCO press releases and position papers (also with other sector associations) to raise awareness and disseminate the position of the sector on EU work.
- FEFCO website, updated with the latest news, events and blog posts.

- Full coverage of the FEFCO Technical Seminar (Oct 2021 – 343,300 impressions across channels)
- Recycling, recyclability and encouraging everyone to recycle!
- Ecommerce and fit-for-purpose packaging
- Hygiene and safety and many other benefits of corrugated
- Creative uses of corrugated
- Many retweets thanks to weekly monitoring

IskayPet, who explain the solutions that the cardboard box brings to each of their businesses with real examples of success in the areas of logistics, marketing, operations or sustainability.

- A Confederation of Paper Industries (CPI, UK) survey, Beyond the Box, showing the link between ‘green’ behaviours and happiness level. Respondents expressed their satisfaction when flattening and taking out old corrugated boxes to recycling and shopping products not packed into plastics.
- VDW (the German corrugated association) shared a survey from Freiburg University showing that if

LEVERAGING AND SYNERGIES WITH NATIONAL ASSOCIATIONS

Thanks to the help of the national associations in reposting, sharing and translating the campaign communication materials, FEFCO’s messages have been disseminated more broadly.

FEFCO also seized the opportunity to adapt some materials provided by national associations.

- Translation by FEFCO of the Spanish corrugated association video testimonials (AFCO). Under the slogan “much more than you imagine”, the initiative has managed to bring together the voices of five executives from leading companies such as Lidl, Leroy Merlin, UPS, LG and

AFCO
@AFCOes

Una de las características más importantes del **#cartón** es que está diseñado para ser seguro y respetuoso con el medio ambiente, en todo su **#ciclodevida**.
Hoy, más que nunca, está claro que el cartón es el material de **#embalaje** del presente y del futuro. **#sostenibilidadsinlimites**

2 Retweets

- 207,000 website user sessions and 278,000 page views in 2021.
- FEFCO has a member area on its website, and an extranet that contains the archives related to committee work (minutes and presentations) and access to presentations for those who attended FEFCO events.
- FEFCO publishes a printed newsletter **FEFCOLink** (3 issues in 2021), which is inserted into the magazine International Paper Board Industry, published by Brunton.



COMMUNICATING TO THE TRADE PRESS AND MEDIA

In addition to its digital communication, FEFCO conducts traditional media activities and regularly issues press releases, available on the website. These help FEFCO to generate more exposure in the trade and packaging press.

2021 releases

- FEFCO welcomes new Director General
- FEFCO Workshop 2021 - monitoring and controlling production processes
- FEFCO crowns corrugated industry supplier champions in Copenhagen
- Smart and sustainable solutions showcased at FEFCO Technical Seminar 2021
- FEFCO launches Corrugated Packaging Recyclability Guidelines
- FEFCO launches Testing methodology for printed corrugated board in food contact





OPERATIONS & INNOVATION COMMITTEE

“We are living and working in a fascinating, though challenging environment: Covid, booming ecommerce, new digital technologies, demanding new legislation, new business opportunities and more. The Operations and Innovation Committee is anticipating the trends and offering a platform, information and tools to support the corrugated industry to successfully face the challenges.”



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



TESTING METHODOLOGY FOR PRINTED CORRUGATED BOARD

FEFCO has issued a [Testing methodology](#) for printed corrugated board in food contact, in light of the absence of specific regulations for paper and board. The purpose of the document is to give a usable methodology tool to corrugated producers and their suppliers when evaluating the inks used on corrugated for food applications.

FEFCO CODE BOOK REVISION (DESIGN STYLE LIBRARY FOR CORRUGATED BOARD PRODUCTS)

The FEFCO Code book revision project is reaching its final stage. An overview of the book was presented during the FEFCO Technical Seminar in October 2021. The final version will be published in March 2022.

NEW PROJECT FOR A ‘CLIMATE NEUTRAL CORRUGATED PLANT’

The project idea is to create a platform to exchange ideas on decarbonisation and how to move towards sustainable and climate neutral plants, from a purely technical point of view. The aim is to develop standards, technologies and equipment, together with the machine suppliers, to run a corrugated board plant with zero CO2 emissions and less energy consumption. The project started with energy analysis based on the FEFCO LCA database. The next step is collaboration on the existing energy efficiency practices. The project also aims to identify possible research and innovation projects.





FEFCO LCA 2021 – LIFE CYCLE ANALYSIS OF CORRUGATED

Since 1994, FEFCO has provided an LCA database for our industry and other stakeholders. FEFCO updates the database every 3 years. The 2021 update should be finalised by the end of Q1/2022. The key findings are considered a credible source of information and can be used for advocacy and communications with customers, EU policymakers and other stakeholders.

TECHNICAL EVENTS – TECHNICAL WORKSHOP AND TECHNICAL SEMINAR

FEFCO online workshop

On 23 February 2021, the corrugated industry and its suppliers shared information on state-of-the-art innovations in process technology, in FEFCO's first online technical workshop, *Monitoring & Quality Control in a corrugated plant*.

Over 280 participants joined the online event. 20 speakers from various companies and countries shared their latest innovations and gave valuable insights on how to increase production efficiency and how to get the optimum product quality from corrugated board.

FEFCO Technical Seminar

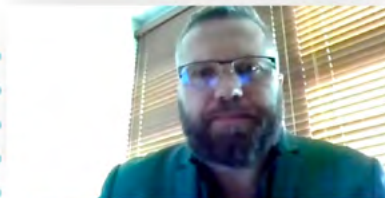
On 20-22 October 2021, 816 representatives from the corrugated board industry and their suppliers gathered for the FEFCO Technical Seminar in Copenhagen to debate innovations, industry trends and how the corrugated sector can adapt to the EU's ongoing overhaul of sustainability regulations. They presented ideas and solutions aimed at producing boxes more efficiently, more sustainably and with a reduced CO2 footprint.

The exhibition included 117 stands, with 80 exhibitors from 34 countries showcasing their products and services. 61 spotlight presentations were given during the 3-day event and FEFCO issued seven awards.



FEFCO WORKSHOP

Sophisticated fortune telling
monitoring and controlling our production processes



NATIONAL DIRECTORS COMMITTEE

In 2021, the National Directors Committee defined a common, new strategic action plan for the committee work. The main objective is the exchange of information and knowledge between the national associations. The NDC's activities aim to support the FEFCO Secretariat to improve its day-to-day work related to the key areas.

- **Health & Safety:** share accident reports, received by FEFCO, with members and encourage members to share their safety alerts as well.
- **Advocacy:** provide information on what is happening at national level and share experiences, data and studies.
- **Marketing and communication:** exchange material to learn from each other and spread the same messages to the outside world.

“As Chairman of the NDC, I think that concerted action by the national associations and FEFCO is vital for a successful corrugated industry lobby and advocacy. The national associations and FEFCO must exchange information and good practices. The associations must support FEFCO in the ongoing work in Brussels, contribute to FEFCO technical projects and help to reach strategic goals. FEFCO and the national associations are playing as in an orchestra.”



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





WHO'S WHO

FEFCO GOVERNANCE

FEFCO Board of Directors

The Board of Directors is composed of at least five and at most twenty-five members, including the President of the Association. (Members list page 25).

FEFCO Executive Board

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



President
Fady Gemayel



Vice President
Saverio Mayer

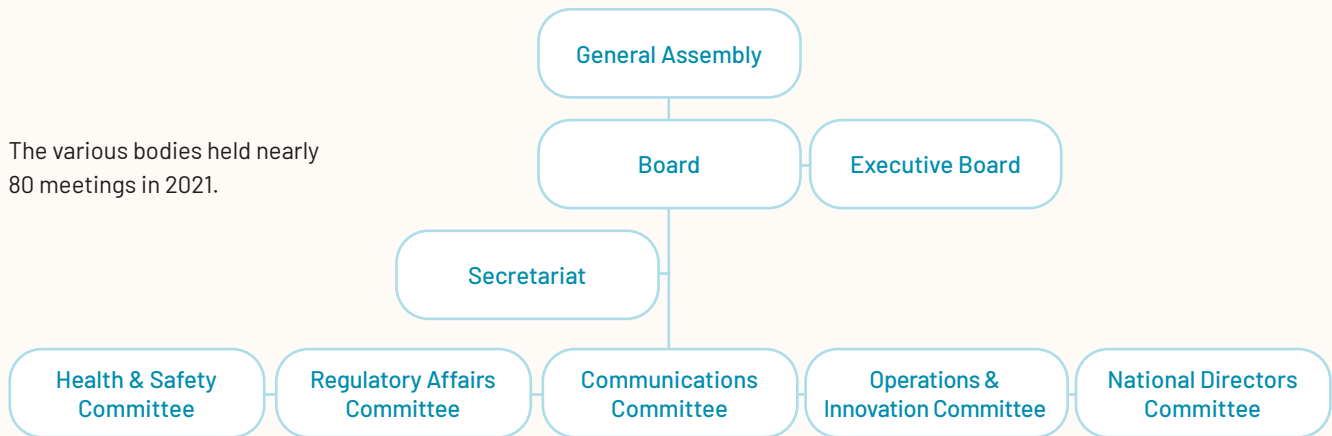


Vice President
Jan Klingele



Honorary Vice President
Nina Iversen

The various bodies held nearly 80 meetings in 2021.



FEFCO WORKGROUPS



● Linked to Regulatory affairs

● Linked to OIC

● Transversal and ad-hoc workgroup

FEFCO BOARD OF DIRECTORS 2021

NAME / ORGANISATION	REPRESENTING
Gemayel Fady	President
Mayer Saverio	Vice President
Klinge Jan	Vice President
Iversen Nina	Honorary Vice President
MAJOR COMPANIES	
Chartrain Eric	International Paper Europe
Wouter van Tol	DS Smith Packaging
Mayer, Saverio	Smurfit Kappa Europe
Schoonbrood Armand	Mondi Packaging Europe
MAJOR ASSOCIATIONS	
Durand Philippe	France (COF)
Würth Steffen	Germany (VDW)
Fausto Ferretti	Italy (GIFCO)
Rogalka Pawel	Poland (SPP)
Santorroman Saldana Leopoldo	Spain (AFCO)
Sükan Buğra	Turkey (OMÜD)
Murray Chris	UK (CPI)
REPRESENTATIVES OF CLUSTERS	
Miklós Rasovszky	Hungary (HFCEM), Romania (ARFCO)
Iversen Nina	Finland (FCBA), Sweden (SWIF)
Ockerman Dirk	Netherlands, Belgium (CBA)
Enzenberg Alexander	Austria (Forum Wellpapper and PPV), Croatia (UHPVK), Czech Rep (SVVL), Switzerland (VSW)

FEFCO SECRETARIAT

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



Director General
Eleni Despotou



**Communications Director
(Deputy Director General)**
Nathalie Schneegans



Technical Director
Krassimira Kazashka-Hristozova



Project Manager
Houriet Lefebvre



Office Manager
Johanna Kloeck



EU Public Affairs Intern
Hana Gallego



FEFCO Accountant



FEFCO PARTNERSHIPS

COOPERATION AND NETWORK



Industries (CEPI); European Carton Makers Association (ECMA); European Paper Packaging Alliance (EPPA); European Federation of Corrugated Board Manufacturers (FEFCO); European Association of Carton and Cartonboard Manufacturers (Pro Carton) and the Swedish Forest Industries Federation (SFIF)

PIJITF (Packaging Inks Joint Industry Task Force)

FEFCO has chaired the PIJITF workgroup since 2020.

PIJITF represents the members of the food packaging supply chain that are concerned with the application of printing inks onto food contact materials. The workgroup discusses what is needed from each level of the value chain to ensure that the final packed food product placed on shelves in a supermarket can safely be used by consumers.

FEFCO IS A MEMBER OF CITPA



CITPA (International Confederation of Paper and Board Converters in Europe)

CITPA coordinates and exchanges information, and where possible, undertakes joint actions on issues of common interest to the paper and board converting industries, with a special emphasis on packaging. CITPA is the

link between the member federations and associations and the European institutions.

This enables the paper and board converting companies in Europe to have a common strong voice when interacting with the EU institutions. Equally, the European institutions need a competent and knowledgeable body to speak to for the paper and board converting industry.

FPE (Fibre Packaging Europe)

FEFCO, together with other leading trade associations representing industries involved in forestry, pulp, paper, board and carton production and recycling, has launched Fibre Packaging Europe, an informal coalition. The members' joint mission is to provide renewable, circular and sustainable paper and board packaging solutions to help achieve the objectives of the European Green Deal.

The six founding members include the Confederation of European Paper

Cepi ContainerBoard CCB (CEPI ContainerBoard)

CCB is a European industry association of producers of corrugated case materials, also called containerboard. Activities are focused on primary-fibre materials (kraft liner, semi-chemical fluting) and recycled-fibre containerboard (e.g., testliner). Members represent a total European production capacity of more than 25 million tonnes of corrugated case materials.

In 2021, FEFCO and CCB collaborated on common technical issues of importance to both associations.



ICCA (International Corrugated Case Association)

FEFCO is a member of ICCA, a platform for worldwide networking of corrugated associations. The





association disseminates worldwide statistics on corrugated. ICCA's services support and enhance its members' work, and contribute to the welfare of the corrugated packaging industry worldwide.


FBA (Fibre Box Association)

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

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

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

FCCG (Food Contact Coordination Group)

The role of the FCCG is to exchange information between associations in the paper value chain in order to address the Commission with one voice concerning food contact issues. Joint work includes the *Food Contact Guidelines for the compliance of paper & board materials and articles*, published in 2019. These replaced the previous *Industry Guidelines for Paper & Board*. Signatory

associations include ACE, CITPA, ECMA, FEFCO, CCB and ETS.

PPCG (Paper Packaging Coordination Group)

PPCG is a group led by CEPI. The group's primary goal is to support the joint advocacy actions of the paper packaging associations.

Packaging Chain Forum

The forum is led by European. It represents the broad packaging value chain (all materials, packaging, brand owners) and works on the coordination of joint statements, with European and national associations as signatories, to approach the European institutions and national governments.

CSG (Cross-Sector Group)

The Cross-Sector Group on food contact represents a broad group of stakeholders with members of the whole supply chain that are concerned with applications of food contact materials. Typical activities relate to providing science-based guidelines for consumer safety, defending the safety of food contact materials, promoting the efforts of the supply chain and improving trust and transparency.

Cross Industry Platform on the EU chemical strategy for sustainability

Representing several industry sectors and under the lead of CEFIC, this is a cross industry platform giving voice

to its members, to collaborate on addressing relevant topics of the EU chemical strategy for sustainability.

CheMI (European Platform for Chemicals Using Manufacturing Industries)

CheMI, led by Intergraf, is a platform for downstream users of chemicals in manufacturing industries. It works as a channel for the downstream users in articles-producing industries, to represent their interests, and aims at contributing to the successful implementation of REACH. CheMI was established in 2003. Its members are trade associations representing a variety of sectors.





FEFCO - FIT FOR THE FUTURE!

CREATE A FAVOURABLE FRAMEWORK FOR MEMBERS

FEFCO works to shape a bright future for its members, for the industry and for Europe's economy and society.

INCREASED VISIBILITY TO MEMBERS AND KEY EU STAKEHOLDERS

In the past years, FEFCO has successfully built a network and tools to engage with a wider and targeted audience. This will be particularly valuable to disseminate the strategic work on single use and climate neutrality.

CONTRIBUTIONS TO TECHNICAL DEVELOPMENT WORK

Technical development work has always been one of FEFCO's strengths. FEFCO is a technical reference within the sector, and develops and maintains recognised standards, guidelines and testing methods. It also runs projects in cooperation with suppliers to enhance the efficiency of the manufacturing processes.



*Frans Timmermans
Vice-President of the European
Commission*



MARKET AND POLICY INTELLIGENCE

FEFCO monitors news related to developments in packaging trends, supply chains and, of upmost importance, EU policy.

Our aim is to help members, in their day-to-day business, to anticipate risks, identify opportunities, discover new strategic insights and make informed strategic decisions.

EVENTS FOR MEMBERS AND THE BRUSSELS/EU COMMUNITY

FEFCO organises technical seminars and workshops that are considered by technical stakeholders as must-attend events. We aim to replicate this success with webinars, the FEFCO Summit and other public affairs events in Brussels, for members and other interested parties.

COOPERATION WITH OTHER ORGANISATIONS

A key element of FEFCO strategy is enabling coordination, cooperation and collaboration between organisations in the value chain, to accomplish goals that FEFCO couldn't reach working in isolation.

Our key objective is to strengthen FEFCO's position on the Brussels/EU scene and to enable a favourable environment for members notably on single use and the decarbonisation of corrugated packaging. In 2022, we will speed up project delivery while building on robust, fact-based fundamentals.

Eleni Despotou



NOTES



NOTES



The Federation of Corrugated Board Manufacturers

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Printed on recycled paper