



# FEPE Marketing Committee

Minutes: 11-06-2024

## Attendees:

Andrzej Kuczborski (Artic Paper)	Paul Frith (Multiplastics (Europe) Ltd.
Jens Mesdag (Artic Paper)	Stanislav Menard (Nova Kuverta doo)
Kai Steigleder (Bong)	Ignacio Reiris (PRINTEOS)
John Zöllin (Elco AG)	Soheila Schneider (Sidaplast Specialty Films)
Yves Peiffer (ELEP NV)	Bastian Steinmetz (Steinmetz)
Jean-Noël Horeau (Gascogne Flexible)	André Wienstroer (Tompla)
Jean de Coüespel (Mayer Kuvert Network)	Markus Khur (UPM Kymmene Oyj)
Daniela Steri (IRPLAST)	Torsten Jost (Winkler+Dünnebier AG)
Patrick Machiels (Kaenguruh)	Joachim Hueber (Winkler+Dünnebier AG)
Nicolas Baudart (La Couronne)	Udo Karpowitz (FEPE)
Thomas Schwarz (Mayer Kuvert Network)	Paul Walsh (Ambassador)
Maja Menard Cedilnik (MM KUVERTA)	Wael Maaninou (Ambassador)
Matija Cedilnik (MM KUVERTA)	Viktor Kovačič (FEPE)

## Agenda:

- 1. Welcome and Apologies**
- 2. Packaging and Packaging Waste Regulation (PPWR) – Presentation by CITPA**
- 3. Market Reports and Statistics**
- 4. Activities**
  - a. Keep Me Posted Initiative Presentation
  - b. CITPA
  - c. Two sides
  - d. OMR Hamburg
  - e. DRUPA
  - f. Fachpack
  - g. Ambiente/Paperworld
  - h. UPU
  - i. others
- 5. FEPE Ambassador Presentation and Congress Hamburg 2024**



## 2. Packaging and Packaging Waste Regulation (PPWR) – Presentation by CITPA

### Regulatory Update: Packaging and Packaging Waste Regulation (PPWR)

**Overview:** The presentation provided a comprehensive update on the Packaging and Packaging Waste Regulation (PPWR), detailing key milestones, timelines, scope, and requirements. It emphasized the transition from a directive to a regulation, which necessitates compliance without transposition into national laws.

### Key Milestones and Timeline:

- **2022-2026:** Progressive steps through the EU legislative procedure, with expected adoption in Q3 2024, and entry into force by the end of 2024 or early 2025.
- **18-Month Transition Period:** Businesses must adapt operations within a short timeframe.
- **2030 and Beyond:** Introduction of reuse targets and mandatory recycled content for various types of packaging.

### Scope and Requirements:

- **Design for Recycling:** New criteria focus on recycling performance grades, packaging minimization, and producer documentation.
- **Definitions:** The regulation introduces harmonized definitions for key terms like 'manufacturer', 'importer', 'producer', and 'supplier'
- **Composite Packaging:** Specific thresholds and exclusions for chemical substances are outlined.
- **Waste Reduction Targets:** Mandatory targets for reducing single-use packaging and increasing recyclable content by set percentages through 2040.

### Challenges and Opportunities:

- Businesses face challenges with the rapid implementation of new standards and the need for extensive documentation.
- Opportunities arise from new market needs, particularly in sustainable packaging solutions and innovative recycling technologies.

### Expectations:

- Council adoption - Q3 2024
- New Parliament need to approve the text
- Entry into force = end of 2024 or 2025.
- Transition period of 18 months = short time for business operators to adapt
- Business operations and distribution
- PPWR shall establish specific deadlines to fulfil specific secondary legislation



## Changes PPWR implementation will bring to the packaging industries

- All EU countries will have to reach new waste reduction targets
  - By 2030 → 5%
  - By 2035 → 10%
  - By 2040 → 15%
- Some types of single use packaging will be banned from the markets
- Mandatory reuse targets will be introduced for:
  - Transport packaging (incl. e-commerce)
  - Grouped Sales
  - Beverages
- Minimisation of empty space
- EU Labelling system
- 100% recycling will be the norm
- Mandatory recycled content in plastic packaging
- **Substances in Packaging**
  - Limit the monitoring of hazardous substances to promote innovation.
  - All packaging should be recyclable by 2035, aiming for industry-wide recycling at scale.
- **Article 6**
  - Proposes a table of recyclability performance grades.
- **Packaging Minimization (Articles 11 and 24)**
  - Emphasizes keeping the packaging space as low as possible with an empty space ratio.
- **Reuse Targets (Articles 11, 26, 27, and 29)**
  - Setting goals for the reuse of packaging.
- **Labelling (Article 13)**
  - Detailed requirements for packaging labelling.
- **Restrictions on Plastic Carrier Bags (Article 34)**
- **Documentation, Labelling, Reporting**
  - Be strict on what can be provided to the commission.
- **Extended Producer Responsibility (EPR)**
  - Introduction and implications of EPR.
- **Penalties**
  - Article 68 outlines penalties for failing to comply with Articles 24 to 29.

## 3. Market Reports and Statistics

- **Envelope Market Update - Udo Karpowitz**
  - Classical envelope business is on a downward trend.
  - Q1 2024: -5.7%, Year 2023: -15%.
  - Forecasts around 30 billion units this year for FEPE members, with reasons including delayed order intake and low advertising spending.
  - B2B letter communications are expected to disappear in 5-6 years.



- Western Europe (excluding Scandinavian and Baltic countries) still maintains a significant share of letter communications but will shrink by 50% in the next decade.
- **Paper Industry Figures**
  - Eurograph showed a 9.5% improvement in Q1 2024, but the trend had been downwards in the previous two years.
- **Market Report: Germany**
  - Mandatory electronic invoicing by 2025, with full compliance by 2028, impacting B2B business.
- **Nordic Countries, France, UK**
  - Various regional updates provided in the presentation.
- **Market Report: Stanislav Menard - South East**
  - Increased competition from Turkish envelope exports and stable but slightly expensive paper market.
- **Supplier Product Reports**
  - Detailed updates from W+D, Gascogne Papier & Flexible, Paper/UPM, Arctic Paper/Poland, BOPP Window Film/Irplast SpA, OPS Window Film, and Eukalin.

#### 4. Activities

##### Keep Me Posted Initiative:

- Campaign successfully focused on defending the rights of European citizens to choose how they receive information.
- Emphasized the need for balanced communication options to include both digital and traditional methods by highlighting people's personal stories.
- Aimed at promoting the benefits of paper-based communication.
- The digital transformation does not take into account citizens who don't have basic digital skills. All citizens must be given the fundamental right to have access to both digital and physical communication, and freedom to choose.
- Presenting new tagline: Why choice matters
  - Choice matters because without it, people are marginalised and isolated from society.
- New strategy to keep KMPEU relevant and relatable:
  - Bring the campaign to life with stories of people who are marginalised by a lack of choice
  - Align with the values of many politicians who are concerned with this type of marginalisation
  - Leverage social media to build public support, and foster partnerships that amplify our message.
  - Get everyone involved to spread the word and engage with their communities.
- Generating a report
- A set of deliverables including:



- Contacting the relevant stakeholders including MEP's, NGOs and Law firms
- Communicating weekly on social media platforms and creating a press release
- Developing a communication tool kit including a messaging guide
- Organisation of an EU event with 60 members.

#### **CITPA and Two Sides Campaigns:**

- CITPA focuses on representing the paper and board packaging industry, addressing regulatory challenges, and promoting industry interests.
- The Two Sides campaign counters environmental misconceptions about paper use, promoting sustainable forestry and recycling practices through several materials available in several languages
  - Myths & Facts Booklet
  - Packaging Facts Booklet
  - Fact Sheets
  - Factographics
  - Mini videos
- **New Initiatives**
  - New Love Paper logo, Two Sides infographics, and a call for ordering Myths and Facts booklets.
- **OMR Festival**
  - Discussion on presenting KMPEU in the NGO section, emphasizing paper as a medium for advertising.
- **DRUPA**
  - Member feedback on the smaller scale of the fair compared to previous years, with a notable presence of Asian companies and changes in W+D's exhibition strategy.
- **FACHPACK**
  - Report on the joint booth with W+D and a request for manufacturers to send samples for the FEPE booth.
- **UPU Event in Bern**
  - FEPE's visit, meetings, and discussions on thematic chapters and the potential role of rapporteur.

#### **FEPE Ambassador Presentation:**

- Programme designed to empower professionals within the envelope and light e-commerce packaging industry to become advocates for the sector.
- Ambassador Responsibilities:
  - Engage with Policymakers: Participate in meetings and events with EU policymakers to represent the envelope and packaging sectors.
  - Public Speaking: Speak at industry conferences, seminars, and public forums to promote the industry's achievements and goals.



- Networking: Build connections with industry leaders, stakeholders, and other ambassadors to share knowledge and drive collective progress.
- Ambassador Benefits:
  - Professional Development: Gain advanced skills in communication, digital presence, and advocacy.
  - Networking Opportunities: Connect with industry leaders, policymakers, and fellow ambassadors.
  - Recognition: Be recognized as a leading voice within the industry, enhancing professional credibility and visibility.
  - Contribution to Industry Growth: Play a role in shaping the future of the envelope and packaging sectors.
- Outlined the role of FEPE ambassadors in advocating for the industry and influencing policy.
- Emphasized the importance of representation at international forums and regulatory bodies.

## 5. FEPE Congress

### FEPE Congress: Hamburg 2024:

- Announced the upcoming congress, highlighting key themes and expected participants.
- Encouraged members to participate actively and contribute to discussions on future industry trends.