

# MARKETING COMMITTEE MEETING

13 February 2025



# AGENDA

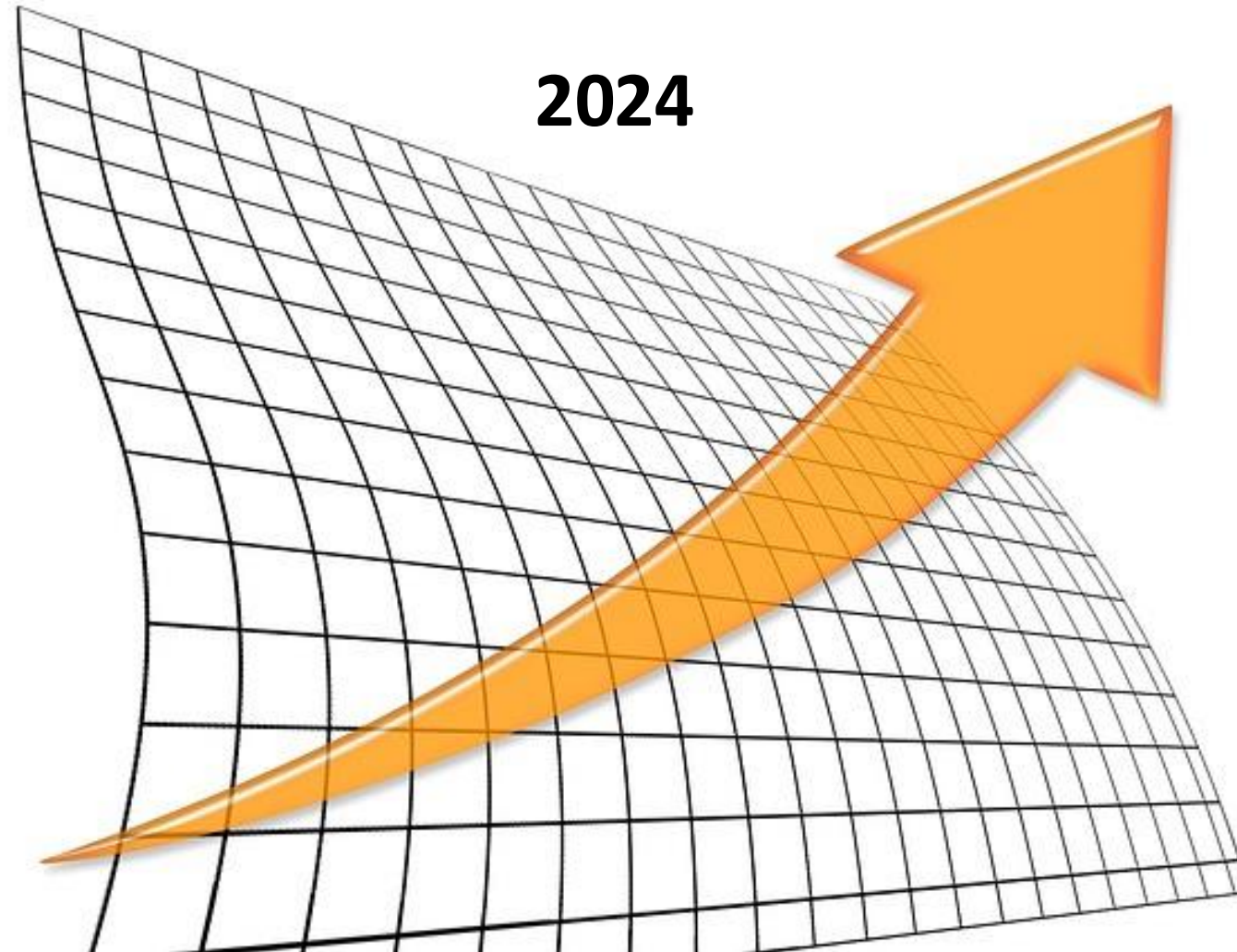
- Welcome
- Statistics and Market reports
- CITPA (legislation update; EUDR, PPWR, GPSR)
- EPRC
- EU Ecolabel
- UPU
- Fachpack 2025
- Other events
- Two Sides
- Keep me posted EU
- Communication strategy
- FEPE Congress - Hamburg 2024 & Sofia 2025 & Palma 2026
- A.O.B.

# REGISTERED PARTICIPANTS

- Johann Schned (Artic Paper)
- Yves Peiffer (ELEP NV)
- Urbain Gezang (Gezang)
- Daniela Steri (IRPLAST)
- Sarah Lesting (Leipa)
- Patrick Machiels (Kaenguruh)
- Nicolas Baudart (La Couronne)
- Thomas Schwarz (Mayer Kuvert Network)
- Jean de Coüespel (Mayer Kuvert Network)
- Maja Menard Cedilnik (MM KUVERTA)
- Paul Frith (Multiplastics (Europe) Ltd.)
- Bastian Steinmetz (Steinmetz)
- André Wienstroer (Tompla)
- Felix Cordier (Schönfelder)
- Eric van der Kallen (Sealed air)
- Thierry Palanca (Transcendia)
- Richard Eichfeld (Transcendia (Ohio))
- Paul Walsh (Ambassador)
- Viktor Kovačič (FEPE)

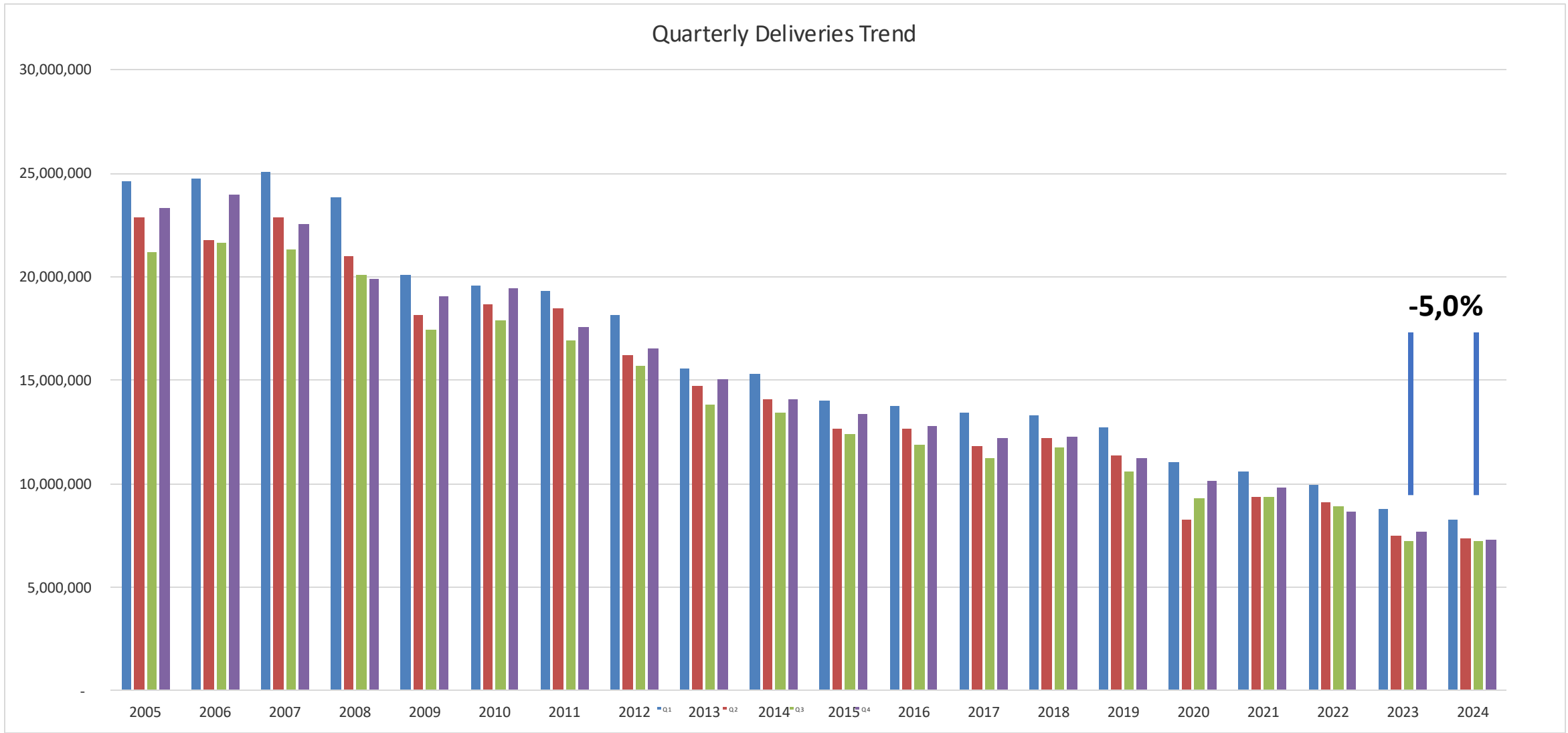
# STATISTICS AND MARKET REPORTS

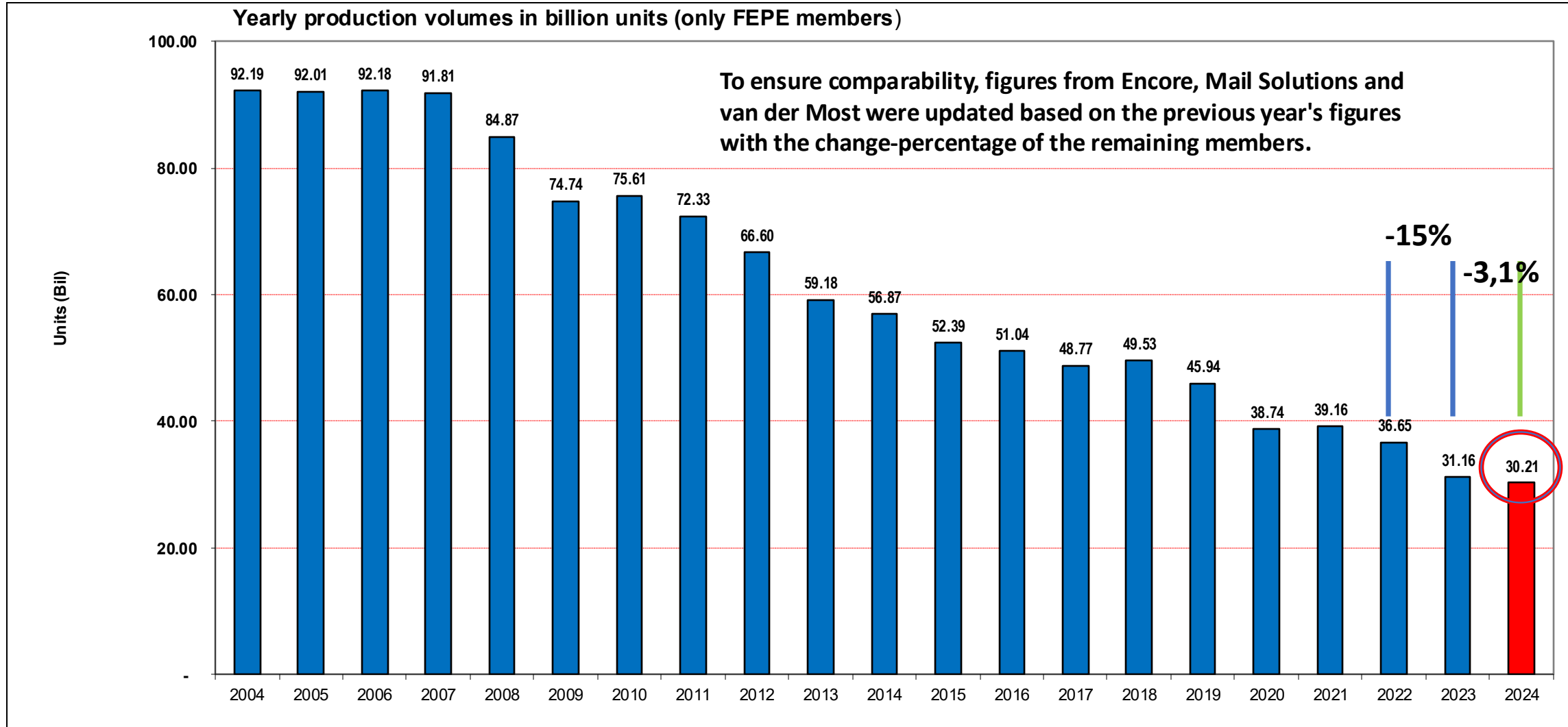
# Envelope market update



## Sales volumes in the European envelope industry stabilized

- **Q4.24: -5,0% below previous year**
- **1-12.24: -3,1% below previous year**
- **Moderate decline of 2024 above the long-term trend of our industry.**
- **2023 was still significantly below the long term trend**
- **Volume 2024 was 950 million pcs. below the previous year**
- **European market volume 2024 incl. non members was in-between 35 and 36 billion pcs.**



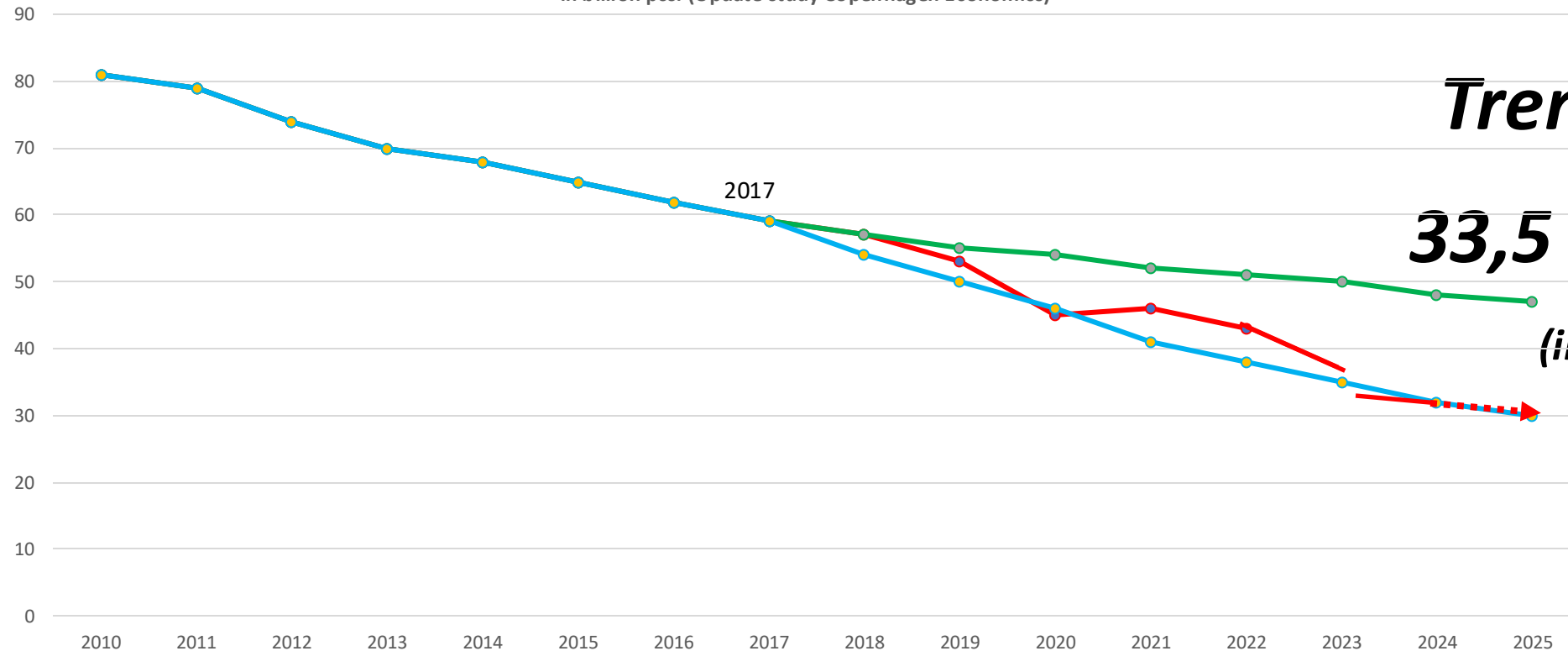


## Some reasons:

- DM-Business: According to Nilsen, more or less only digital channels benefited from a recovery in 2024.
- Our direct mail business is still far below pre-Corona levels.
- Overprint-Business had also been touched from this development
- Inserting envelopes: more or less in line with long term trend
- Online-Business: high expectations have not been fulfilled until now
  - (2023: **-11,8%** - 2024: only **+1,1%** (**not inflation adjusted** - source bevh))

It is also always interesting to compare the actual figures of our industry with the projection of Copenhagen Economics for the period 2017 up to 2025.

Estimate of European letter mail volume development , 2017-2025  
in billion pcs. (Update study Copenhagen Economics)



*Trend is towards*

**33,5 billion in 2025**

*(incl. non-members)*

source: Copenhagen Economics 2017 - forecast 2021 ff  
B.O.S. GmbH

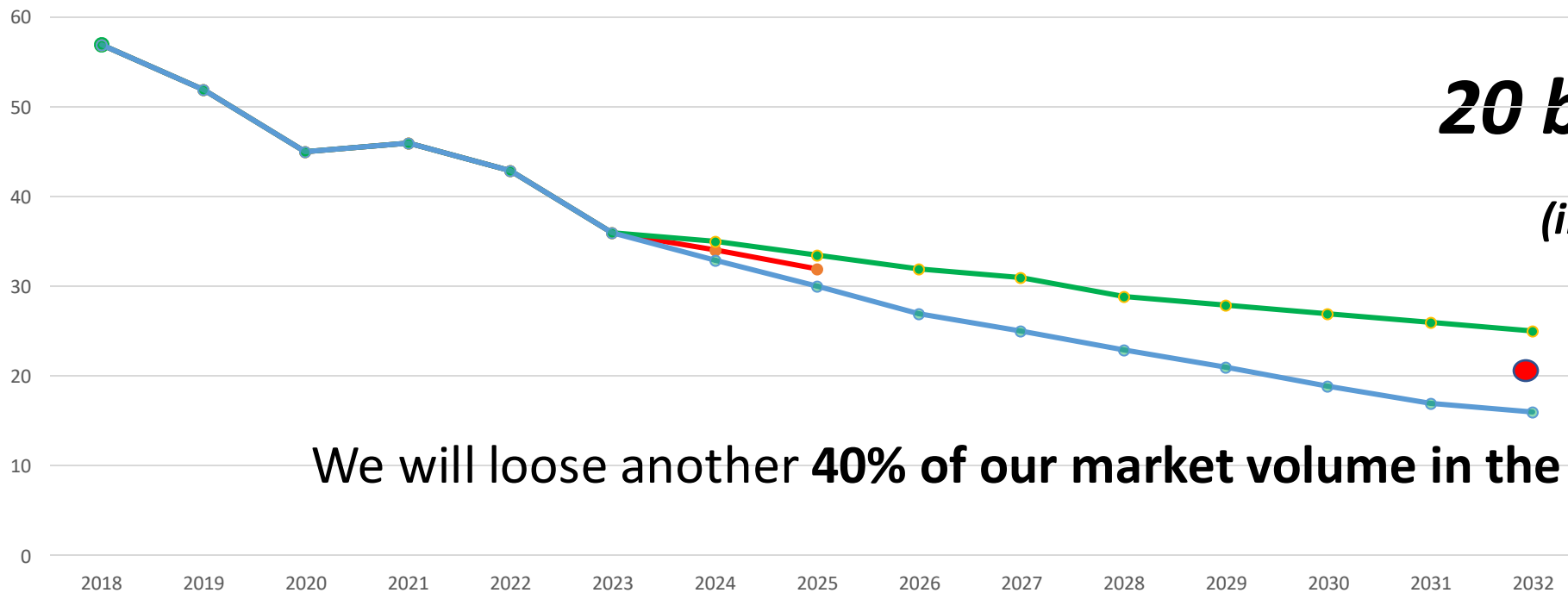
● reality ● best case ● worst case

source: Copenhagen Economics 2017 - forecast 2021 ff B.O.S. GmbH

Let us take a look at our industry's figures until 2032 (in the system of the 2017<sup>th</sup> study of Copenhagen Economics). Now for the period 2023 - 2032

Estimate of European letter mail volume developmen, 2023-2032  
in billion pcs.

***Trend is towards  
20 billion in 2032***  
*(incl. non-members)*



We will loose another **40%** of our market volume in the next 7 years



**Paper industry saw improvements in 2024**

## Back in minus in Q4.24

		Euro Graph			versus	FEPE		
		Euro-Graph				FEPE		
<b>2022</b>	1	346.427	-12,6%	58,9	9.970.186	-6,1%	43,3	
	2	322.372	-15,4%	54,8	9.134.577	-2,8%	39,7	
	3	336.319	-2,3%	57,2	8.882.375	-5,0%	38,6	
	4	270.780	-27,4%	46	8.665.868	-11,5%	37,7	
<b>2023</b>	1	268.904	-22,4%	45,7	8.778.399	-12,0%	38,2	
	2	234.829	-27,2%	39,9	7.471.172	-18,2%	32,5	
	3	221.452	-34,2%	37,7	7.215.110	-18,8%	31,4	
	4	245.578	-9,3%	41,8	7.691.026	-11,2%	33,4	
<b>2024</b>	1	294.358	9,5%	50,1	8.279.286	-5,7%	36,0	
	2	280.810	19,6%	47,8	7.392.106	-1,1%	32,1	
	3	237.728	7,3%	40,4	7.224.812	0,1%	31,4	
	4	233.513	-4,9%	39,7	7.310.418	-5,0%	31,8	



**Euro Graph**

**versus**

**FEPE**

	Euro-Graph			FEPE		
<b>2018</b>	1.564.277		66,5	49.527.611		49,4
<b>2019</b>	1.469.578	-6,1%	62,5	46.064.568	-7,0%	46
<b>2020</b>	1.291.049	-12,1%	54,9	38.926.749	-15,5%	38,8
<b>2021</b>	1.494.528	15,8%	63,5	39.156.961	0,6%	39,1
<b>2022</b>	1.275.898	-14,6%	54,2	36.653.006	-6,4%	36,6
<b>2023</b>	970.763	-23,9%	41,3	31.155.707	-15,0%	31,1
<b>2024</b>	1.046.409	7,8%	44,5	30.206.622	-3,1%	30,14



# Envelope market update



# Manufacturer Product Report: Germany

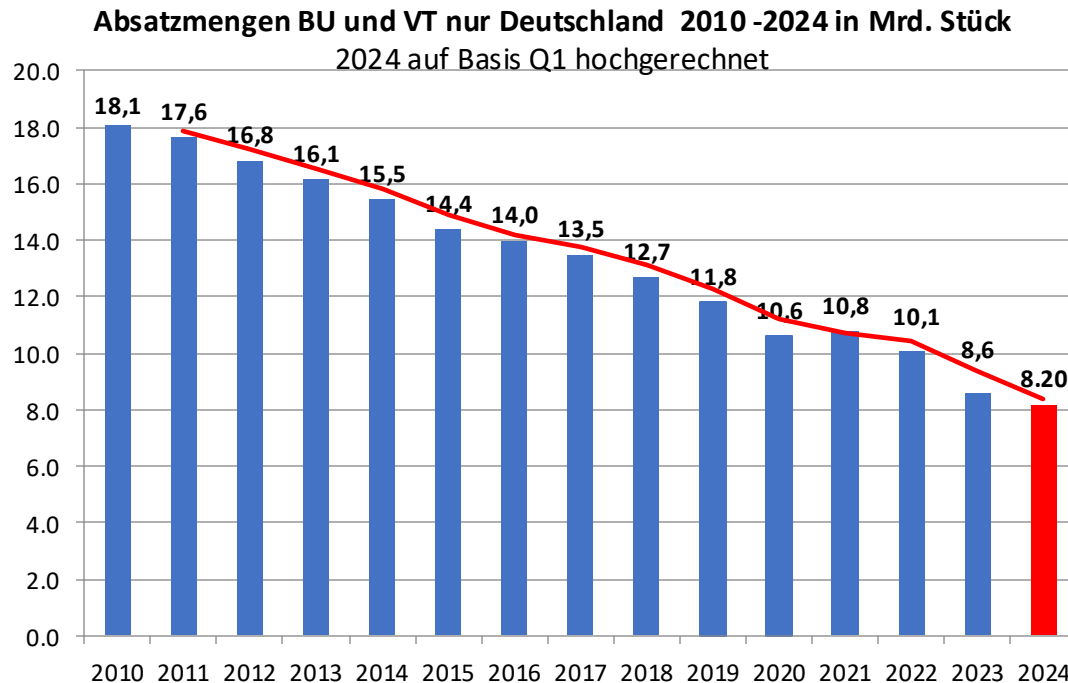
## Manufacturers

- HH Druck (sub. Of Theobald) has been sold to S. Hartwig

## Economy:

GDP 24: - 0.2 %  
 Inflation 24: +2,2 %  
 Unemployment rate 12.24: 6,1 %

GfK Consumer index 2010= 0: - 22,4 (!)



## Post and Postal Partners



### Deutsche Post with worse service in future

- Letters from Deutsche Post are allowed to travel significantly longer. In the future, 95 percent of standard letters must reach the recipient on the third working day, and 99 percent must be in the mailbox on the fourth working day.
- 1. of January 24 increase of the standard postage from 0,85 € to 0,95 €

## E-Commerce / E-substitution

- bevh: German eCommerce business rather weak also in 2024
- bevh: the negative trend has been stopped in 2024, however with a growth of 1,1% (not inflation adjusted) eCommerce business remained rather weak.
- Chinese dropshipping platforms (TEMU etc.) are becoming an increasing problem (shipping billions of PE bags to Europe)

## Miscellaneous

- For big companies Electronic invoices are mandatory in Germany already since
- 1st of January 2025 (!). Small companies
- have to follow until end of 2027!

# Manufacturer report: Spain & Portugal – February 2025

### Envelope Manufacturers

- Manufacturers no significant changes
- The concentration of mailinghouses in Spain and Portugal is confirmed.
- Lack of work is driving some manufacturers to cut prices and drag down the market.

### Envelope Market

- Last quarter with very low activity.
- The low activity coincides with the time of annual enquiries for next year, this conveys uncertainty about the immediate future and puts downward pressure on prices.
- Large customers are making enquiries for more than one year but fortunately manufacturers are no longer committing to prices without review every 6 months or maximum 1 year.

### Post and Postal Partners

- New Spanish postal tariffs for 2025
  - Ordinary letter (up to 20 gr) national up 8.2%.
  - International letter and card (up to 20 gr) up 8.8%.
  - National parcels: up 2%.

### E-Commerce / E-substitution

- E-commerce, returning to the natural levels.
- E-Commerce trend is growing year on year

### Miscellaneous

	<i>Spain</i>	<i>Portugal</i>
• GDP:	2,9%	3%
• Inflation:	+ 2,87%	+2,8%
• Unemployment:	12 %	6,3%
• Population:	48,6 Mio	10,5 Mio

# Manufacturer report: FRANCE

## Envelope Manufacturers :

- Tompla close Ghesquières, transfer manufacturing operations to Madrid
- GPV France purchase L'Occitane d'Envelope overprinting operations
- GPV France sell L'Esno to NavEm , sign an exclusive partnership with new owner
- Technic Envelope – Papeteries Moderne in liquidation, stop activities with immediate effect

## Envelope Market

### ARCEP report :

2019 : 8.962	- 6,9 % vs n-1:
2020 : 7.225	-19,4 %
2021 : 7.177	- 0,7 %
2022 : 6.915	-3,7 %
2023 : 6.049	- 12,5 %

balanced by stamp price increase from 01.2024

### 2024 Market trend :

- ~ 5- 7 % decline vs 2023
- 2025 very weak demand due to political and business uncertainty

- **La Poste plan envelope market to be at ~3 B pieces at horizon 2030**

## Post and Postal Partners

- Postal tariff from January 2025 : 1,39 € +7 %
- La Poste maintain 6 days per week deliveries
- Postal service is now D + 3 all across the country
- Mail service is now ~17 % of La Poste turnover
- Parcels volume through universal service + 6,5 % CAGR (ARCEP)

## E-Commerce / E-substitution :

- All indicators confirm E Commerce volume on goods long term growth of ~ 6-8 %
- France 2nd market E-Commerce market in Europe after UK
- Significant swap from plastic to paper for Press & E Commerce flat products

## Miscellaneous

- GDP 2024 : + 1,1 %      2025 : forecast ~ 1%
- Unemployment : 7,4 % -> 8 % slight increase
- Inflation 2022 : 5,2 %    2023 : 4,9 %    2024 : 1,8 %
- Eco-contribution on graphic paper : 2022 : 65 €/T    2023 : 74 €/T    2024 : 84 €/T  
2025 : 90 €/T    LT Target 130 €/T
- Significant increase in businesses bankruptcies : + 17 %

# Manufacturer Product Report: Nordics

## Manufacturers

- Mayer (Lyche/AddBrand) ended overprint operation in Norway 1.7.2024
- Addbrand acquired ICE Kuvert in Denmark 1.8.2024
- No personnel changes
- Full availability of materials

## Market

- Edita got acquired by Capman and acting management 11/2024
- KMD externalized printing and inserting to Intermail 6/2024
- Universal postal service ended 1.1.2024 in Denmark

## Environmental

- Estimated volume decline -10% in 2025

## E-Commerce / E-substitution

- Sweden abolished a tax (0,25 €/bag) on plastic bags on November 1st, 2024
- E-commerce market in recession due to purchase power of customers

## Miscellaneous

- 12/2024 CPI inflation SWE 0,8%, NO 2,2%, DK 1,9%, FIN 0,7%

# Market report:

*South East: Stanislav Menard*

# Supplier Product Report: Arctic Paper Kostrzyn



# Supplier Product Report: Arctic Paper

## **Arctic Paper Kostrzyn Receives EU Ecolabel Certification**

Arctic Paper Kostrzyn, known for producing high-quality uncoated, wood-free offset paper and graphic paper, has received the prestigious EU Ecolabel certification for its entire product range. This recognition confirms the company's commitment to environmental responsibility and sustainable production practices, as the EU Ecolabel is awarded to products that demonstrate a reduced environmental impact throughout their lifecycle, from raw material sourcing to manufacturing.

*"We are pleased to announce that our products have been awarded the EU Ecolabel. This achievement highlights our commitment to developing sustainable practices and enables us to communicate our efforts more effectively to customers, suppliers, and other stakeholders. Obtaining the EU Ecolabel prepares us to meet the growing demand for wood-free uncoated paper that meets high environmental standards. Moving forward, we will continue to focus on improving our environmental performance and sustainable practices."* said Michał Jarczyński, CEO at Arctic Paper.

Arctic Paper Kostrzyn has been supplying high-quality uncoated graphic paper under the Amber brand to Europe for many years.

# Supplier Product Report: Arctic Paper Kostrzyn Solar Park

APK has already installed a new solar panels farm with capacity 16 MWp launched in July. By the end of last year it was increased by an additional 2 MWp. In 2025 will be installed 9 MWp – then the Kostrzyn mill will have approx. 29 MWp in total.



# Amber Terra

Arctic Paper Kostrzyn S.A.

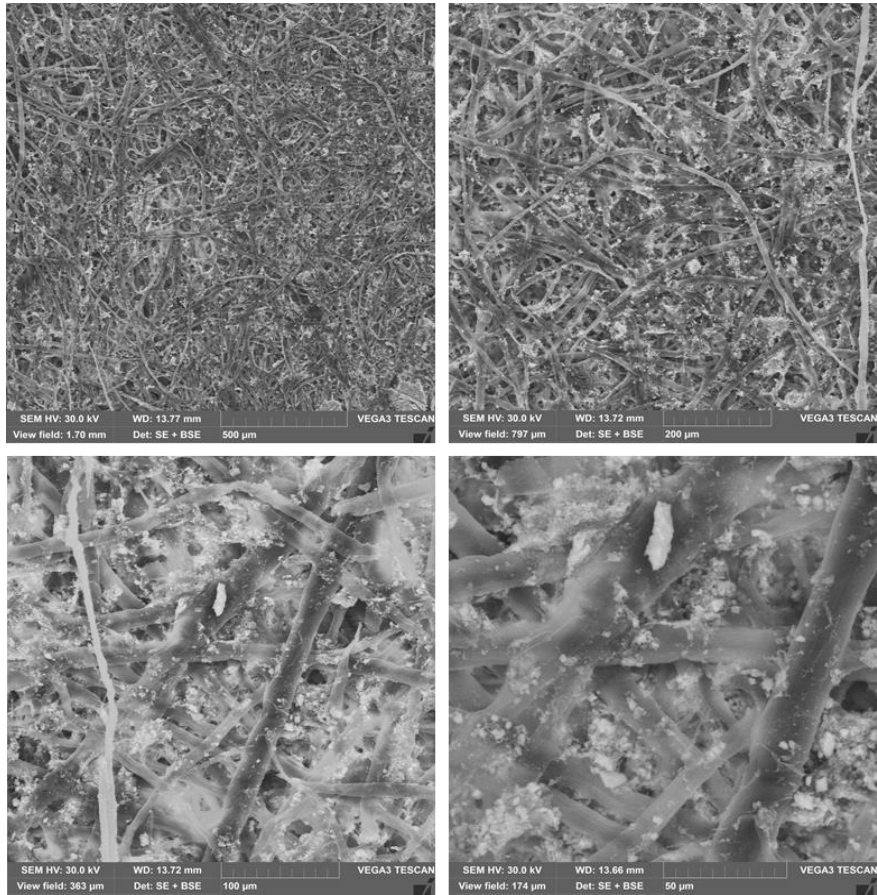


ARCTIC PAPER

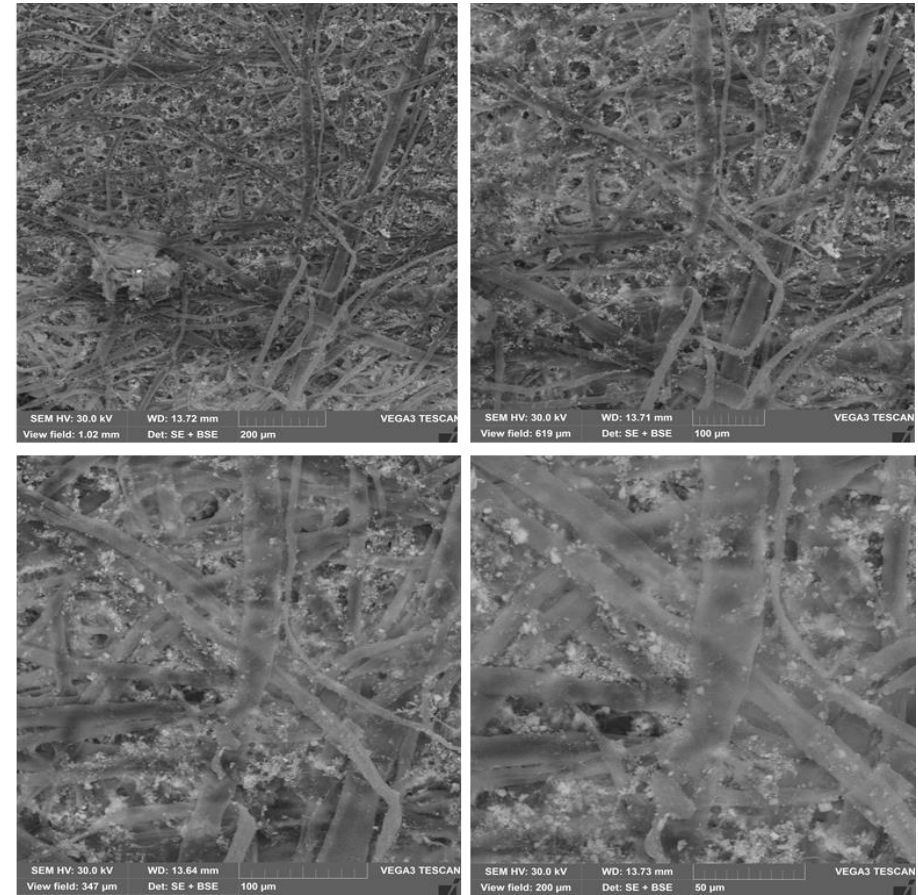
## Increased opacity

- Improved print quality
- Reduced bleed-through of printed content
- Lower grammage - better efficiency. Increased opacity makes it possible to use a lower paper grammage without losing print quality





Reference sample



Sample with crosslinking

Crosslinking - a process leading to the formation of a three-dimensional supermolecular network, due to the formation of bridges between various chemical molecules.

The addition of such „crosslinkers" in sufficient quantities, causes the filler molecules to agglomerate into larger clusters, as a result more filler being retained on the cellulose fibres.

## Product available:

- in reels



- in sheets



# Supplier Product Report: LEIPA

## Manufacturers

- Since the closure of PM1, the LEIPA Greet series is no longer available at LEIPA.
- However, project ongoing whether LEIPA Greet tawnybrown a future-proof grade for our PM5.
- 70gsm recycled brown available.
- Heavy development work into alternative fibre mixes for an ecommerce paper.

## Market

- Increase in interest in our natronboard for rigid mailers.
- Difficult market in containerboard – ecommerce affected by cost of living crisis

## Environmental

- SBTi awaiting verification with a clear commitment to net zero by 2045
- LEIPA care package (reduction of PCF by renewable energy) increasing in popularity
- EUDR exemption for recycled products confirmed

## Miscellaneous

- **Direct Mail piece incl. envelope on our coated recycled grades a huge success (samples with me!)**

# Supplier Product Report: Gascogne Papier & Gascogne Flexible

## Manufacturers

- **MG Brown Kraft:** strong demand in January 2025 from all markets
- **Multilayers laminates :** 2005 results in line with budget

## Market

- Fall in demand for MG brown kraft for envelopes by – 20% compare to 2023
- Reinforced kraft & release papers for envelopes 2024 sales in line with budget
- PML Limoges ( France) declared bankrupt

## Deforestation Regulation EUDR 2023/1115 :

fortunately implementation postponed to January 2026. Problem is that traceability on incoming wood stop at the woodpile, making it impossible to link the incoming wood to the reels of paper produced from it.

## Miscellaneous



the world's largest steel ANDRITZ Yankee ( 6,8 m width, 7,9 m diameter) has been delivered at Gascogne Papier Mimizan in 3 parts

# Supplier Product Report I/2024: Machinery / W+D

## Manufacturers

- Order situation on Mail - Envelope and Inserting - rather weak / facing similar situation globally
- E-Commerce orders are picking up
- W+D GmbH changed name to BW Converting GmbH. (Similar to all other companies in the BW Converting platform)

## Market

- Shift from traditional Mail business towards E-Commerce production
- Interest from clients outside the traditional envelope business still there - Inhouse production or Online providers
- Growing demand for End-of-line automation

## Environmental

- E-Commerce and packaging continue to trend towards plastic-free material - starting in Europe but now globally also - still valid
- Monitoring energy input and consumption is becoming more important due to raising energy costs. - still valid
- W+D Accelerate service highly appreciated due to the ongoing situation of reduced technical skills - still valid

## Miscellaneous

- Looking positive towards the Hunkeler Innovaton Days in Lucerne - in the past it was revitalizing the inserting business
- CSRD / CBAM regulations: uncertainty of political pressure going forward

# Supplier Product Report: BOPP Window Film/Irplast SpA

February 13th 2025

## Manufacturers

Irplast concluded 2024 on a positive note despite facing a slight decline in overall production volumes.

This outcome reflects the company's adaptability in a challenging market environment. The company managed to maintain active production lines by diversifying its special product offerings, which included a mixed range of items.

## Environmental

Considering the utmost importance of our planet drives Irplast to continually pursue noble goals by utilizing BOPP films sourced from UCO as circular bio-materials.

Irplast is working on resource efficiency, recycling, and waste reduction also minimising harmful emissions and pollutants.

The PCR remains the most requested source by customers, and this source still needs to be managed by reserving the volumes provided in advance according to availability.

We envisage that by 2028, more than 50% of our BOPP production will be with alternative resins..

## Market

From the envelope market we had some specific inquiries from manufacturer who require a sustainable window film solution for their customers .

Our ISCC Plus certified BOPP version is fully available for new projects .

Prolonged lower profitability in the commodity BOPP market in Europe has seen major players stopping lines and reducing supplies. Short term risks of shortages and long lead times for Eu manufactured films.

## Miscellaneous

The PPWR regulation was published in Official Journal on 22. January 2025 and comes into Force on 10. February 2025. After this, a transitional period of 18 months begins until the regulation applies.

This will set ambitious targets to reduce waste, phase out harmful single-use plastics, and encourage reuse systems. With packaging waste rising, these rules signal a critical shift toward a circular economy where materials are used efficiently and sustainably. Irplast has been focusing its efforts on the development and production of high-quality, products, particularly in the mono-material items. This specialization is indicative of a broader industry trend towards sustainability and efficiency, as mono-material products are easier to recycle and have a lower environmental impact.

To increase our production capacity and cover the market trend for sustainable packaging solutions we expect to install our new Extrusion line investment in H2-2025.

# Supplier Product Report: Plastic – Multiplastics

## Manufacturers

OPS Market – volumes remain stable

High quality OPS window films – the material of choice for high quality and machine processing efficiencies.

Transcendia changed it's strategy to market for PROCITE™ PS films by going direct to the envelope manufacturer as of January 2025 and will supply slit rolls from it's French site.

## Environmental

EU PPWR – see updates from Marketing Committee and FEPE Secretariat.

## Market

Overall market decline per FEPE MC statistics and Mr. Karpowicz.

Labour – availability and skill shortages – ongoing.

EU - project under pressure – France and German economic pressures.

UK - Labour Government under pressure – taxes and borrowing costs hikes

Royal Mail – reducing second class deliveries - and increasing prices.

## Miscellaneous

New US Administration – tariffs, trade wars – geopolitical uncertainty.

- USPS temporarily stops accepting Parcels from Hong Kong and China. Letters and flats are not affected at this time.

# Supplier Product Report: Adhesives - EUKALIN

## Manufacturers

EUKALIN confirms not to make changes to the technology and product portfolio for the envelope industry. With that, EUKALIN will continue its known supply and technical service levels for the envelope industry.

EUKALIN's continuous focus on the envelope market enables us to understand needs for improved sustainability. Latest achievements are new products being almost free from mineral oil feedstocks and are fit for use in standard envelopes but e-commerce envelopes as well.

## Market

Raw material costs: Important raw materials such as vinyl acetate Monomer (VAM) are reported to be tight but availability in general is good. Demand picked up late in 2024 resulting into reduced availability on the spot market. Pricing is predicted to be stable in the first month 2025.

## Environmental

EUKALIN has developed new adhesive products with high bio contents replacing the amount of mineral oil based polymers.

The cold glue products are suitable for envelope manufacturing but also for adjacent markets like E-Commerce and Bags.

## Miscellaneous

Nothing to report

# CITPA (LEGISLATION UPDATE; PPWR, EUDR, GPSR, GCD)

# Legislation update (1)

Strong cooperation with CITPA on legislation monitoring:

- **EUDR update**
  - The postponement was published on 23 December 2024<sup>1</sup> with the result that the EUDR shall be applied from 30 December 2025 by medium and large companies and from 30 June 2026 by small and micro businesses.
  - Closely monitoring and updating you via FEPE newsletter and emails
  - Continue to update on EC webinars & FEPE webinar will be organised
- **PPWR update**
  - Confirmed – letters are not in the scope of PPWR as they are a communication tool
  - Lobbying success – flexible packaging is not in the scope of Article 29 on reusability quotas
  - PPWR includes provisions that could benefit flexible packaging, such as Articles 9 and 21, which promote reducing excessive packaging and encourage lightweight, efficient solutions.
  - Article 24's limit on empty space in e-commerce packaging further supports sustainable designs.
  - While the framework of the PPWR has been established, there are numerous details that still need to be addressed: what is considered recyclable by 2030, and this could still potentially reshape our current paper recycling processes.
  - Updates will follow.

# Legislation update (2)

- **General Product Safety Regulation update:**
  - FEPE guidance was sent out to all members
  - Update on EC webinars
  - FEPE webinar/presentation could be organised
  - **Transition Period:**
    - **Products in Compliance:** Products that comply with General Product Safety Directive (Directive 2001/95/EC) and were available on the market before 13 December 2024 can remain on the market after this date.
    - **Regulatory Obligations:** All obligations from the regulation apply from 13 December 2024 and will be valid for both online sales and continued sales through other means; all product offerings must comply with Regulation (EU) 2023/988.

# Legislation update (3)

- Obligations for Envelope manufacturers:
  - Only place safe products on the market.
  - Conduct internal risk analysis.
  - Produce technical documentation:
    - Description of essential characteristics important for safety assessment
    - Analysis of potential risks
    - List of all relevant standards and other elements

**Storage for 10 years, regular updates required!**

**Aligned with recommendation of other similar associations– Intergraf, CITPA, FEFCO.**

# Legislation update (4)

- **Green claims directive update:**
  - On 28 January 2025 the first trilogue on Green Claims took place. Not much permeated from the closed-door meeting, but the co-legislators normally start sharing their positions and red lines to begin the political negotiations. What we know on the EP position is:
    - Environmental marketing claims like "biodegradable" or "less polluting" should be verified before companies may use them, but simpler and common types of claims should be able to benefit from easier/faster verification.
    - Micro-enterprises should be excluded from the new obligations and SMEs should have one extra year (compared to the rest of companies) before the rules apply to them.
    - Businesses breaking the rule should face penalties including exclusion from procurement processes, confiscation of revenues, and a fine of at least 4% of annual turnover.

# European Paper Recycling Council (EPRC)

# EPRC - Monitoring Report Highlights 2023

- **Recycling Rate Increase:** Achieved a recycling rate of 79.3% in 2023, exceeding the target of 76% by 2030.
- **Impact of Market Dynamics:** The reduction in paper and board consumption in 2023 contributed to the rise in the recycling rate, despite lower paper collection volumes.
- **Investments and Innovations:** New recycling capacities established in 2023 have strengthened the sector's infrastructure.
- **Challenges from External Factors:** Energy price surges in 2022 impacted recycling operations, highlighting the sector's sensitivity to economic fluctuations.
- **Legislative Support:** EU legislations, including updated targets for packaging waste, continue to drive high recycling rates across the member states.
- **Global Leadership:** Europe remains the leader in paper recycling, significantly ahead of other global regions.
- **Long-term Trends:** Over the last three years, the average recycling rate was 74.4%, demonstrating consistent progress toward sustainability goals.

# EU ECOLABEL



# EU Ecolabel

Joint communication activities

2025 & 2026





**EU ECOLABEL ?**



## **Why is EU Ecolabel a better choice?**

**Find the answers to all  
your questions, just ask!**

#WhyEUEcolabel  
[www.Ecolabel.eu](http://www.Ecolabel.eu)



# Why EU Ecolabel Campaign

## What is the concept?

**Why** is the EU Ecolabel a better choice?

The EU Ecolabel's "Why Campaign" is a strategic communication campaign designed to address the label's core values for Consumers, Businesses, and Stakeholders.

Rooted in the concept of *Why*, the campaign emphasises the core reasons behind the EU Ecolabel's importance:

WHY

- is the EU Ecolabel a better choice?
- is the EU Ecolabel a label you can trust?
- do EU Ecolabel goods and services obtain the label?
- choose the EU Ecolabel for your everyday products?
- showcase EU Ecolabel products in stores and online?
- use EU Ecolabel products in public and private procurement?
- should you certify your goods or services?



# Flexible Target Group Strategy of the *Why EU Ecolabel* Campaign

The '*Why Campaign*' offers a flexible framework for EU, national, and stakeholder levels, allowing tailored approaches while ensuring consistent messaging.

## EU level:

Aligned with the EU Ecolabel Action Plan 2025 for broad visibility and impact.

## CBs & stakeholders:

Guided by National and Stakeholder Communication Plans (NCPs & SCPs) for regional adaptation.

## Key target groups:

- Licence Holders/business associations: Focus on low/moderate uptake product groups/most recently revised product groups criteria and TAS.
- Retailers: E-retailers, bio-shops, and tourist platforms.
- Public & Private Procurers: Simplify procurement compliance and take part in the green transition.
- Consumer Organisations & NGOs: Trusted advocacy partners.
- Policymakers: Align with competitiveness and circular economy objectives.
- Consumers: Highlight health, quality, and sustainability.
- Media: Share success stories.



## Joint communication activities:

Shared initiatives will align with common target groups, ensuring synergy across all levels.

# Campaign structure

## EU level Action Plan 2025

### Objectives include:

- Boost uptake in priority groups
- Increase online and retail visibility
- Enhance public and private procurement
- Strengthen consumer recognition and trust

### Activities include:

- Digital and social media
- High-impact webinars/ online workshops (Q&A etc...)
- Participation in major fairs & events
- Content creation and editorial



## Why EU Ecolabel Campaign 2025 - 2026 Why is the EU Ecolabel the better choice?

### OVERARCHING OBJECTIVE

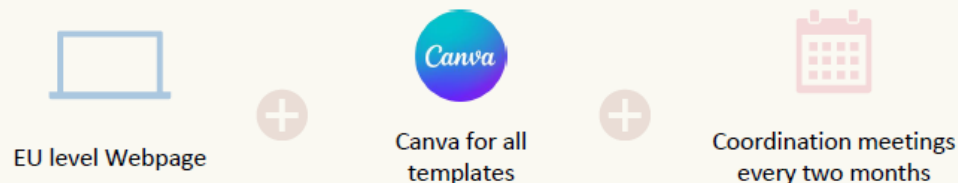
- ✓ Increase public awareness of the EU Ecolabel by 10%, reaching 43% recognition in 2025
- ✓ Increase label uptake by 3112 licenses by end of 2025.

### Joint Communication Activities

#### Top opportunities for the Campaign



These activities offer high-impact platforms for delivering the 'Why Campaign' message consistently across multiple audiences and channels.



### MONITORING & EVALUATION

Social media analytics, Meltwater, EU Barometer, n° licence holders

## National & Stakeholders level

### NCPs & SCPs

#### Croatia

##### Objectives include:

- Increase Consumer Awareness
- Boost Business Engagement
- Enhance Public Procurement Practices
- Improve Online and Retail Visibility

##### Activities include:

- Development of a Mobile Application
- Social Media Campaigns and Paid Ads
- Training for Public Procurement Professional
- Focused Youth Engagement Initiatives

#### Latvia

##### Objectives include:

- Increase Consumer Awareness
- Boost Business Engagement
- Enhance Public Procurement
- Strengthen Partnerships and Funding

##### Activities include:

- Participation in Tourism Expo Riga
- Digital Summer Campaign
- Online Workshop for Stakeholders
- Collaboration with NGOs for Outreach
- Social media all year

#### Germany

##### Objectives include:

- Increase Consumer Awareness
- Boost License Holder Engagement
- Enhance Public Procurement Practices

##### Activities include:

- Social Media Campaigns and Posts
- Webinars on Key Topics (e.g., Cosmetics)
- Presence at Trade Fairs
- Articles in Consumer and B2B Magazines EU Ecolabel Certificate Awards at Events

# Timeline (for joint activities)

Coordination calls  
every two months

Periods	Actions	Details	Topics / themes
• January-February-March 2025	<ul style="list-style-type: none"> <li>Preparation (phase 1)</li> <li>Joint SoMe post – end of March, more information to follow.</li> </ul>	<ul style="list-style-type: none"> <li>Draft content</li> <li>Prepare visuals &amp; Canva templates</li> <li>Gather short videos from key individuals and planning others</li> <li>Design, translate and print booth</li> </ul>	
• April 2025	<ul style="list-style-type: none"> <li>Campaign launch - 2 April</li> <li>General posts on social media - <i>Why is the EU Ecolabel the better choice</i></li> <li>Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>Once a week (banners, videos)</li> <li>Paid outreach at the EU Level on LinkedIn</li> <li>Coordinated posts across countries &amp; stakeholders</li> <li>1 main campaign video translated in all languages (short, illustration)</li> <li>EU Consumer Summit (Brussels)</li> </ul>	General
• May-June 2025	<ul style="list-style-type: none"> <li>First <i>High-level EU Ecolabel Webinar</i> “<i>Why EU Ecolabel for Businesses?</i>”</li> <li>Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>Co-designed agenda, co-promoted , online and offline for speakers</li> <li>EU Green Week (Brussels), EU Youth Week, (Strasbourg)</li> </ul>	Business & competitiveness
• July-August 2025	<ul style="list-style-type: none"> <li>Social media posts</li> <li>Articles online</li> </ul>	<ul style="list-style-type: none"> <li>Once a week for two months</li> <li>Users Generated Content (video shorts) about personal care products (own languages)</li> </ul>	Personal care products
• September 2025	<ul style="list-style-type: none"> <li>Second <i>High-level EU Ecolabel Webinar</i> “<i>Why EU Ecolabel for Public Procurement?</i>”</li> <li>Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>Co-designed agenda, co-promoted , online and offline for speakers</li> <li>ProcureCon EU conference, Brussels</li> </ul>	Procurement
• October 2025	<ul style="list-style-type: none"> <li>* Youth &amp; Education initiatives – offline and online</li> <li>Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>Video challenge towards students + Paid outreach</li> <li>Once a week for one month</li> <li>Sepawa Congress (Berlin)</li> </ul>	Products related to schools, students’ life, student housing (cosmetics, paper products, furniture...)
• November-December 2025	<ul style="list-style-type: none"> <li>Social media posts</li> <li>Articles online</li> </ul>	<ul style="list-style-type: none"> <li>Once a week for one month</li> <li>Users Generated Content (video shorts) by LH and Retailers</li> </ul>	Retailers & e-retailers
• January 2026	<ul style="list-style-type: none"> <li>Social media posts</li> <li>Articles online</li> </ul>	<ul style="list-style-type: none"> <li>Once a week for two months</li> <li>Users Generated Content (video shorts) Tourist accommodations (own languages)</li> </ul>	Tourist accommodations (Business & consumer angle)

# Competent Bodies & Stakeholders contributions

## Principles:

- The campaign is flexible and allow for high engagement of lower touchpoints.
- You can choose to participate to every stage of campaign or select the moment you which to be more active.
- You can adapt the campaign messages, visuals, and moment to your needs/planning /events.
- The EC can provided target support & discuss with you how to best implement the campaign – just ask !
- Your inputs will be asked step by step – as the campaign unfolds....

### Phase 1 – January to end of March

1. **Inform us** if your wish take part in and contribute to the Joint Communication Campaign (*Please say yes!*)
2. **Participate in coordination meetings** - important moment to share ideas/needs/synergies between countries.  
Date of first meeting tbc, more information will follow. Bilateral discussions may also take place if requested.
3. **Translate Why into all EU languages** – based on your translation : )
4. **Send use questions** you believe should be answered “*Why* “
5. **Plan for a joint SoMe post in late March and SoMe posts in April** – using the templates on Canva and Communication Calendar #WhyEUEcolabel. More information to follow.

# UNIVERSAL POSTAL UNION (UPU)

## NEW STRUCTURE OF THE UPU CONSULTATIVE COMMITTEE

### CHAIR

WALTER  
TREZEK



### VICE-CHAIR

SANTOSH  
GOPAL



Policy and regulations



Addressing and direct marketing

VACANT

Freight and transport

VACANT

Customs and product security



E-commerce



## THEMATIC CHAPTER RAPORTEURS

Postal financial services



Sustainability



[WWW.UPU.INT](http://WWW.UPU.INT) Become a member of the Consultative Committee today



# Critical areas of work



## Key Focus Areas for FEPE to Continue Until S7

- **Promoting recyclable and reusable packaging** to conserve natural resources and reduce waste.
- **Delivering innovative solutions for flexible packaging** aimed at optimising logistics by reducing empty spaces and lowering package weight. These efforts not only improve efficiency but also prepare the industry for the upcoming EU Packaging and Packaging Waste Regulation (PPWR), which will set stricter standards for packaging sustainability and waste reduction.
- **Advocating for a mandatory Universal Postal Service worldwide.** Postal operators are more likely to deliver packages to remote areas if Universal Postal Service is obligatory, unlike private sector delivery services, which prioritise profitability over accessibility.



# Dubai cycle (2025–2029)



Focus areas and objectives for FEPE during the next Dubai cycle (2025–2029):

- **Advocating for mandatory Universal Postal Service** to ensure accessibility for all regions.
- **Using standardisation for letterboxes** to accommodate small packages (end-to-end delivery for packages under 2kg).
- **Transition from Weight to Volume-Based Measurement for Parcels** (cm<sup>3</sup>) to shift to volume-based measurement for determining postal charges to encourage the use of space-efficient packaging.
- **Supporting the UPU and the industry** by providing expertise and insights on lightweight packaging solutions for e-commerce.

# FACHPACK 2025

# FACHPACK 2025?



# FACHPACK 2025 - packages

- We have invited members to express their interest as co-exhibitors:
- Two alternative trade fair packages are offered:
  - **Fair package 1:**
    - The company logo is shown in a prominent place (see picture)
    - Free entry in the exhibitor directory (co-exhibitor)
    - **Price: tbc**
  - **Fair package 2:**
    - Company logo is shown in a prominent place (see picture)
    - Free entry in the exhibitor directory (co-exhibitor)
    - Meeting table with 4 seats (reserved for co-exhibitor)
    - **Price: tbc**

# OTHER EVENTS

# OMR HAMBURG

- KMPEU partners determined that OMR 2025 is not the appropriate venue for this type of initiative.
- NGO Area Call: The call for participation in the NGO area has not yet been announced.
- Decision: Considering the mismatch of the venue for the initiative and the timing of the NGO area call, we might not participate this year.

# Other events where FEPE should be present

- We encourage all members to inform us about relevant industry events where FEPE's presence could add value.
- Participation in diverse events can enhance FEPE's visibility and influence within the envelope and flexible packaging industry.
- Attending these events provides networking opportunities that can lead to collaborations and partnerships.
- Possibility for the Association to receive free/discounted tickets

# TWO SIDES

# Two Sides Focus

**Tackling  
Greenwash**



**Educating  
Consumers**



**Facts,  
Resources &  
Information**



# REMINDER!

Two Sides material, which has been updated with fresh facts and figures, is featuring the FEPE logo for your promotional needs. These material encompass:

- Myths & Facts Booklet
- Packaging Facts Booklet
- Fact Sheets
- Factographics
- Mini videos

All these updated materials accessible via Tresorit (FEPE encrypted cloud storage):

[https://web.tresorit.com/l/w0GAm#8\\_NVTYo8foYT6iZLYxSX8g](https://web.tresorit.com/l/w0GAm#8_NVTYo8foYT6iZLYxSX8g)

We can **print and deliver** the Myths & Facts Booklet and Packaging Facts Booklet directly to you.

Price:

- Myths & Facts Booklet: 0.77 EUR per piece + postage
- Packaging Facts Booklet: 1.22 EUR per piece + postage



# Fact Sheets

1. Paper Packaging, The Natural Choice
2. Paper Bags, The Natural Choice
3. Paper Production & Sustainable Forests
4. Paper Recovery & Recycling
5. Forest Benefits & Biodiversity
6. Renewable Energy & Carbon Footprint
7. Paper's Water Footprint
8. The Impacts of Greenwash
9. What's More Hygienic; Hand Dryers or Paper Towels

**Paper Packaging The Natural Choice**

**The Facts**

Well-designed, efficiently produced, appropriately used and responsibly disposed of it is essential to prevent product damage and can help extend a product's life. It is chain and provides safe and convenient access to goods. Packaging communicates while providing a great 'unboxing experience' to those receiving gifts or luxury items, damaging to both brands and the planet.

The impact on the environment caused by discarded man-made materials has reached critical levels.

There is now a greater need than ever for packaging to be sustainable throughout its life cycle. Packaging should incorporate eco-design at its inception, use responsibly sourced raw materials, and be manufactured using efficient processes that are driven by renewable energy. Packaging should be re-used or recycled whenever possible, then sent to the most appropriate end-of-life solution, such as incineration for energy generation or composting.

Paper packaging is part of the solution. Paper packaging is made from wood fibre, a natural and renewable material that is highly recycled.

**The Sustainable Choice**

The key raw material for making paper packaging is cellulose fibre from trees, a natural and renewable and is a highly recycled raw material.

Virgin fibre is sourced from sustainably managed forests. Despite consumer perception, European forests are growing in size. Between 2005 and 2020, European forest cover grew by 58,990km<sup>2</sup> – an area larger than Switzerland and equivalent to 1,500 football pitches of forest growth every day.<sup>1</sup>

*“ In 2018, the European paper and cardboard recycling rate was 83% – the highest of any packaging material. ”*

Europa, 2018

+44 2037 26920 @TwoSidesUK  
www.twosides.info @TwoSidesUK  
enquiries@twosides.info /company/twosidesuk

**Eine natürliche Entscheidung Papiertragetaschen**

**Die Fakten**

Täglich werden wir mit den wachsenden Auswirkungen unserer Plastiknutzung konfrontiert, u.a. auch durch die steigende Zahl von Plastikmüll und -geräten, die in den Weltmeeren treiben. Die EU-Mitgliedsstaaten haben darauf mit Verbots-, Ombürofen und Initiativen zur Reduzierung von Plastik reagiert. Während eine allgemeine Verringerung unnötiger Plastikabfälle einen wertvollen Beitrag für eine zirkuläre und weniger verschwendende Abfallwirtschaft leistet, stellen Verpackungsoptionen aus Papier aufgrund ihrer natürlichen und erneuerbaren Eigenschaften eine attraktive und praktikable Alternative dar. Umf. zahlreiche Studien belegen die Vorteile von Papierüten gegenüber Kunststofftragetaschen.

Beispiele in der Bevölkerung über den erneuerbaren Plastikverbrauch:

In den letzten Jahren sind die Auswirkungen von Einwegverpackungen und Kunststoffen auf die Umwelt immer deutlicher geworden. Stimmen mit der Befürchtung, dass vergleichsweise wenig Kundenverpackungen kompostiert werden (42 % EU-Durchschnitt 2016) und nur 14 % wiederverwertbar sind, ist die Verschmutzung der Weltmeere ein Problem, wofür laut Umweltschüttern ein Großteil der Verantwortung liegt. Umweltschüttern zeigen sich besorgt und befürchten, dass bis zum Jahr 2050 mehr Plastik als Meeresschnecken Eier im Meer sein könnten.<sup>1</sup>

Laut Marina Litter Watch stehen Einwegtaschen an 7. Stelle der Abfallprodukte, die am häufigsten an Europas Stränden zu finden sind.<sup>2</sup> Zwischen 2015 und 2019 wurden 3 % des angespülten Materials als Plastikfetzen und 0,2 % als Papiertragetaschen identifiziert. Und das obwohl der Anteil von Plastikfetzen abgenommen hat, da die europäischen Staaten gebündelt und den Verbrauch eingeschränkt haben.<sup>3</sup>

*“ Fast 80 % der Abfälle im Meer stammen vom Land. Das meiste davon ist Kunststoff. Inzwischen finden wir Plastik in den Mägen von Seewägen und gestrandeten Wälen. Es ist offensichtlich: Wir müssen handeln. ”*

Europäischer Umweltkonferenz, Kopenhagen, November 2017

EU-Staaten müssen den Verbrauch von Plastikfetzen deutlich einschränken.

Im Jahr 2018 führte die EU Rechtsvorschriften für Plastikfetzen ein, mit dem Ziel, den durchschnittlichen Verbrauch pro Person von rund 200 Tüten pro Jahr zu senken. Bis Ende 2019 soll der Pro-Kopf-Verbrauch auf 90 und bis 2025 auf 40 Plastikfetzen pro Person fallen.<sup>4</sup>

Wird erhöht soll 2022 eine Steuer auf Einweg-Plastikfetzen und hat so den Verbrauch um 95 % reduziert.<sup>5</sup> Andere Länder haben ähnliche Maßnahmen ergriffen, um den Verbrauch von Plastikfetzen zu senken, darunter Frankreich und Belgien (in Österreich liegt ein Geotextilsteuert dazu vor), Deutschland (in Dänemark, Island, den Niederlanden, Spanien und dem Vereinigten Königreich) und freiwillige Verpflichtungen (Deutschland und Frankreich). Diese Maßnahmen haben Verbraucher dazu bebildet, wiederverwertbare Einwegtaschen zu benutzen und einige Erzeuger dazu bewegt, Alternativen zu beschaffen, nicht biologisch abbaubaren Kunststoff zu ersetzen.

**Papierfetzen als attraktive Alternative**

Die Rohstoffe für Papierfetzen – Holz – ist eine erneuerbare und nachhaltige Ressource. Zwischen 2005 und 2020 wuchsen die europäischen Wälder um eine Fläche so groß wie die Schweiz, was 1,500 Fußballplätzen pro Tag entspricht.<sup>6</sup>


Die Recyclingrate für Papier- und Kartonverpackungen in der EU beträgt 85 % (88 % weltweit). Selbst wenn eine Papierfetzen unweiblich entsorgt wird, hat dies aufgrund ihrer natürlichen kompostierbaren Eigenschaften eine deutlich geringere Auswirkung auf die Umwelt als eine Plastikfetzen.

www.twosides.info @TwoSidesUK  
enquiries@twosides.info /company/twosidesuk

# Factographics And Mini Videos

- 20 Factographics on the sustainability and attractiveness of paper, print media and paper packaging.
- 20 Mini Videos
- Ideal for social media



An aerial photograph of a lush green forest with a white-outlined football pitch overlaid on it. The pitch is centered in the frame, showing the field, goalposts, and center circle. The surrounding forest is dense and green, with some trees showing autumnal yellowing. A white corner graphic is visible in the top right of the image frame.

**European forests, which provide wood for making paper products, have been growing by 1,500 football pitches every day!**

Source: FAO, 2020

To find out more interesting facts,  
visit [www.twosides.info](http://www.twosides.info)

# Love Paper Week 3<sup>rd</sup> - 7<sup>th</sup> Feb 2025



Love Paper Week – A global initiative for the industry to collectively champion paper, sustainability and attractiveness, to consumers and business.

Simple assets and resources, communicated widely, for the industry to use through social media and other individual company communications.

Year 1, modest activity but growing year on year to be a truly recognised week.

Mobilise everyone in the world of paper to celebrate Love Paper Week. From direct mail and sack paper to corrugated board.



# WEEK

3<sup>rd</sup> - 7<sup>th</sup> Feb 2025

[lovepaper.info/lovepaperweek](http://lovepaper.info/lovepaperweek)



# WEEK

3<sup>rd</sup> - 7<sup>th</sup> Feb 2025

[lovepaper.info/lovepaperweek](http://lovepaper.info/lovepaperweek)

# KEEP ME POSTED EU

# KEEP ME POSTED

## EU

### Why Choice Matters



Why Choice Matters





## Elena Muçat, Bucharest, age 67

I still get my pension by post, I still pay with cash and the postman still brings me my bills... **I'm better that way**, I feel more confident, I know what I have to do and how to do it.

## *Why choice matters*

It matters because without it, people **are marginalised and isolated from society.**

Thus, **Keep Me Posted** phase two, tells the story of these people, highlighting why their ability to choose is so important.



## Event Highlights

- **Attendance:** 25
- 6 NGOs
- **MEP's who pledged support:**  
Sebastian Everding, Rudi Kennes and  
Luke Ming Flanagan, Tomas Kubin and  
Idoia Mendia.



KEEP ME POSTED  
EU – WHY CHOICE  
MATTERS

## Engaged NGOs

- Social Platform
- Inclusion Europe
- European Network against Racism (ENAR)
- AGE Platform
- ANEC

# Event Attendees

## NGOs

- ✓ AGE Platform
- ✓ ANEC
- ✓ EDF
- ✓ Finance Watch
- ✓ EACA
- ✓ Inclusion Europe

## MEPs

- ✓ Sebastian Everding - Left Group



## Website and Social Media

Report Downloads: 80

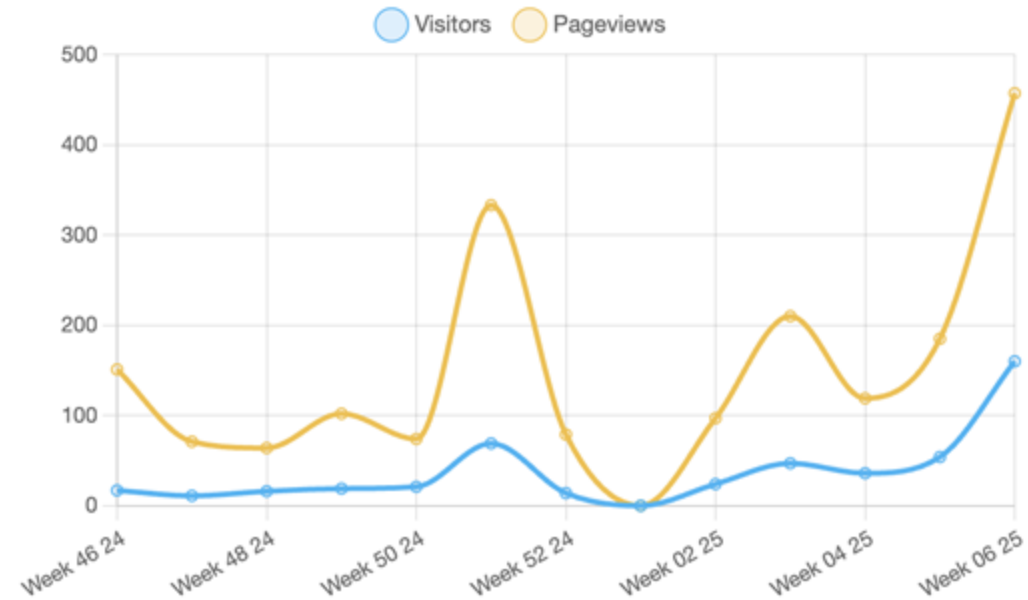
Website Analytics (Aug 24, 2024 – Feb 10, 2025):

- 2K Page Views (400 post event)
- 475 Sessions (232 post event)

LinkedIn Analytics:

- 6858 Impressions (3049 Impressions in last 15 days)
- Followers: Doubled post event

### Insights



KEEP ME POSTED  
EU – WHY CHOICE  
MATTERS

**2025**



# Activities for 2025

## 4 Testimonial Videos

The "Keep Me Posted" campaign videos highlight the challenges faced by marginalized individuals without access to physical mail services. Each video shares a personal story, illustrating the real-life impact of being disconnected from essential communication channels.

These videos aim to evoke empathy, raise awareness, and call for action to ensure inclusive mail services. By showcasing genuine experiences, we hope to inspire support for maintaining and improving mail services, emphasizing that access to physical mail is crucial for social inclusion, dignity, and equality.

## 6 Blog posts

The blog posts in the "Keep Me Posted" campaign provide deeper insights into the stories featured in our videos, offering additional context and detail. Each post explores the broader implications of lacking access to physical mail services, highlighting its impact on daily life, mental health, and social inclusion.

The blog aims to educate readers and foster empathy, encouraging support for the campaign's goals. Through detailed storytelling, our posts reinforce the message that everyone deserves access to reliable communication channels.

## 1 roundtable Event in Strasbourg

We are building our national network by collaborating with local stakeholders and MEP's. In order to enhance the campaign, we will bring together our national partners and MEP's in Strasbourg. Day 1 will be about prepping the national partners and day 2 will be alignment of national members with MEP's followed a round table.

By bringing together community members, local press, and disability campaign representatives, the event will humanize the issue and build a supportive network. The aim is to advocate for policy changes and amplify the voices of those most affected, promoting local and regional support for essential communication services.



# Activities for 2025

## Manifesto Signup Campaign and quarterly Newsletter

The campaign will target the specific focus groups to increase the manifesto signups and at the same a quarterly newsletter will be prepared and circulated with the Manifesto signees and other stakeholders.

## 5 Video interviews of Stakeholders (MEPs and NGOs)

1 Video Interview with an MEP or an NGO Executive will be produced and published every month

## Activate Local Campaigns

Develop local Campaigns in 3 members States with the current campaign as the blueprint.



# COMMUNICATION STRATEGY

## Enhancing FEPE's Communication Strategy (1)

- **Strengthening LinkedIn Presence:** Evolving our approach to make our LinkedIn content more engaging and interactive.
- **Thematic Focus Series:**
  - Every quarter we will focus on a key topic such as sustainability, inviting you to share your initiatives and success stories.
- **Video Interviews:**
  - **Member Spotlights:** Monthly features on individual members.

## Enhancing FEPE's Communication Strategy (2)

- **Visual Content Enhancement:**

- Please send us your images to overcome the challenge of sourcing copyright-free visuals and to provide accurate representation of our industry.

- **Member-Generated Content:**

- Please submit news, updates, and insights for inclusion in our newsletter and LinkedIn posts.

**Note:** These initiatives are supported by our new partnership with LMA Communications, which will manage our website, social media strategies, and provide IT support. The lead from the previous Ambassador Association collaboration will continue these efforts under LMA Communications.

# FEPE CONGRESS - HAMBURG 2024 & SOFIA 2025 & PALMA 2026

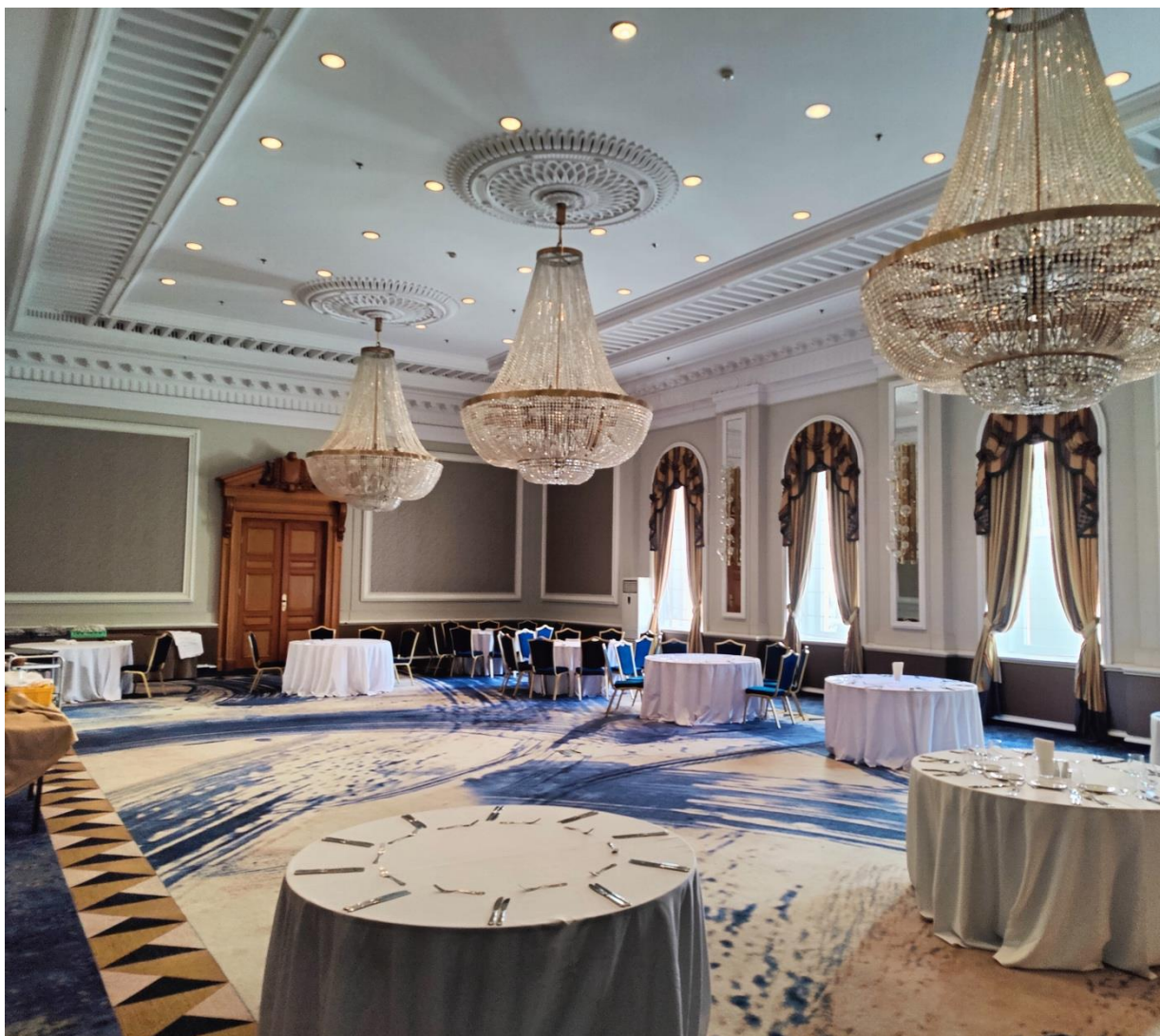
	<b>2024- Hamburg</b>	<b>2023 - Rome</b>	<b>2022 - Ljubljana</b>	<b>2019 - Porto</b>	<b>2018- Tallin</b>	<b>2017- Marseilles</b>
Confernce content	4,09	<b>4,54</b>	N/A	4,10		
Evenings/social activities	4,56	<b>4,63</b>	N/A	4,51	4,34	4,55
Networking	4,54	<b>4,63</b>	N/A	4,50	4,56	4,51
Overall rating	4,54	<b>4,70</b>	N/A	4,46	4,47	4,36

# FEPE CONGRESS Hamburg- feedback

- Great content, very thought-provoking & relevant.
- It is a great idea to have coffee in the same room as the presentations. ADJACENT.
- Andy Owen good speaker, but need to refresh (2006...).
- Alien Mulyk is very appropriate for a new form of FEPE.
- Janez Potočnik partly complicated.
- UPM content is rather vague.
- Paul Walsh is not in love with beer; just got thirsty.
- Wolfgang Trunk relevant but poor presentation.
- Wolfgang Trunk too detailed, only for experts.
- Topics and content as such relevant, but how they were presented not always/only partly creating added value for the audience.
- Too much legislative content for the last day. We need to send people home feeling positive + on a high. It is not easy to find speakers to do this but it will enhance our Congress. SPEAKERS and TOPICS?
- Show regulation in practical work. EURD?
- Excellent content & networking.
- More free time for networking opportunities. NETWORKING TIME ALLOCATED IN AFTERNOON.

## **Sofia Balkan Hotel 10 – 12 September 2025**

- **All venues confirmed & booked**
- **Welcome dinner:** At hotel - arrive at your convenience
- **Gala dinner:** National History Museum – exhibition of golden treasure will be open exclusively for FEPE
- **Farewell dinner:** sightseeing walking tour from hotel ends at restaurant „Event Space 2020 “ – Bulgarian dinner with programme /Bulgarian folklore, music../



## Welcome Dinner Hotel Sofia

Gala Dinner  
National Museum of History - Solar hall





Gala Dinner  
National Museum of History - Solar hall

# Farewell dinner – Event space 2020



**THANK YOU  
FOR YOUR  
ATTENTION!**

