

MARKETING COMMITTEE MEETING

03 June 2025



AGENDA

- Welcome
- EUDR update
- EU–US trade tariffs update
- Green claims directive update
- New FEPE member – Cartiere Saci
- Statistics and Market reports
- EU Ecolabel
- UPU
- Fachpack 2025
- Two Sides
- Keep me posted EU
- Communication strategy
- FEPE Congress - Sofia 2025
- A.O.B.

REGISTERED PARTICIPANTS

- Andrzej Kuczborski, ARCTIC
 - John Zoellin, Elco
 - Yves Peiffer, ELEP
 - Jean-Noël Hoareau, Gascogne
 - Daniela Steri, Irplast
 - Jean de Couëspel, MAYER (GPV)
 - Maja Cedilnik, NOVA KUVERTA
 - Matija Cedilnik, NOVA KUVERTA
 - Stanislav Menard, NOVA KUVERTA
 - Steve Patchett, Multiplastics
 - Nicolas Baudart, PRINTEOS (La Couronne)
 - Gualtiero Giacomuzzi, SACI
 - Felix Cordier, Schönfelder
 - Bastian Steinmetz, Steinmetz
 - Andre Wienstroer, Tompla
 - Marcus Kuhr, UPM
 - Viktor Kovacic, FEPE
- Online:
- Udo Karpowitz, FEPE
 - Lorena Aluas, LMA communication/FEPE

EUDR UPDATE

FEPE

3 June 2025



Overview of the EU Deforestation Regulation

**Margherita Miceli, Forest
Policy Manager, Cepi**

Main obligation: **place** on the EU market / **export** from EU market relevant commodities and products only if

they are
deforestation and
forest-
degradation free

they have been
produced in
accordance with
legislation of the
country of
production

they are covered by a
due diligence
statement (DDS)

 **Due diligence obligation** to ensure compliance

Due Diligence requirements

Collect information

- **Description** of the product (trade name, species, quantity etc.) and information about the **supplier** (name, address etc.)
- **Country of production** and **geolocation** of all plots of land where the wood was harvested and **time and date range** of production

Risk assessment

- Assess the risk of illegal harvesting, deforestation and forest degradation
- Operators can use complimentary information supplied by **certification or third-party verified schemes**

Risk mitigation

Carry out independent audits, appoint compliance officer, etc

EUDR: new timeline after postponement

The Regulation entered into force on **29/06/2023**

December 2024

EC Information System is active

NB: there are now 2 systems: a “test” system for training and a legally valid one!

30 June 2025

Country classification in place

(low, standard, high risk)

30 December 2025

Obligations for **Competent Authorities** enter into application

Obligations for **non-Small and micro operators and traders** enter into application

30 June 2026

Obligations for **Small and Micro operators and traders** enter into application
(**except for the timber sector**)

Ch.44 Wood and articles of wood

Ch.47 Wood pulp

Ch.48 Paper and paperboard, articles of paper pulp, of paper or paperboard (incl. packaging)

Ch. 49 Printed books, newspapers, pictures and other products of the printing industry

Exceptions:

bamboo-based and recovered (waste and scrap) products;

products falling into the code 9619 (sanitary towels and tampons, diapers, napkin liners)

Amendment to Annex I via Delegated Act. Out of scope:

- waste, second-hand and used products
- samples of products and products used for examination, analysis, testing, or sent to the client for evaluation
- packing materials and containers when they are used to support, protect, or carry another product placed on the market and are presented with that product
- accessory materials, such as user manuals, leaflets, catalogues, and marketing materials accompanying another product
- items of correspondence



Draft Delegated Act available [here](#). **NB**: not yet approved!

Scope: recycled paper (Annex I)

The Regulation **does not apply** to goods if they are produced **entirely** from material that has completed its lifecycle and would otherwise have been discarded as **waste**

(Annex I specifies: **waste and scraps**)

FAQ 2.8: exclusion applies to both post- and pre-consumer waste material

→ **however**, if there is mixing of non recycled/recovered fibers, DD obligations apply to the share of virgin material in the mix



Reminder on Packaging – see also FAQ 2.5

- Packaging under code 48 is covered by the Regulation (cartons, boxes, etc.)
- If packaging is placed on the market or exported as a **product in its own right** (i.e. **standalone/ empty packaging**), rather than as packaging for another product, **it is covered by the Regulation** and therefore due diligence requirements apply.

→ packaging producers have to comply with EUDR obligations

- If packaging is used to ‘*support, protect or carry*’ another product and is ‘*presented with the product*’, **it is not covered by the Regulation.**

→ Packaging users (incl. brand owners) are outside of the scope of EUDR



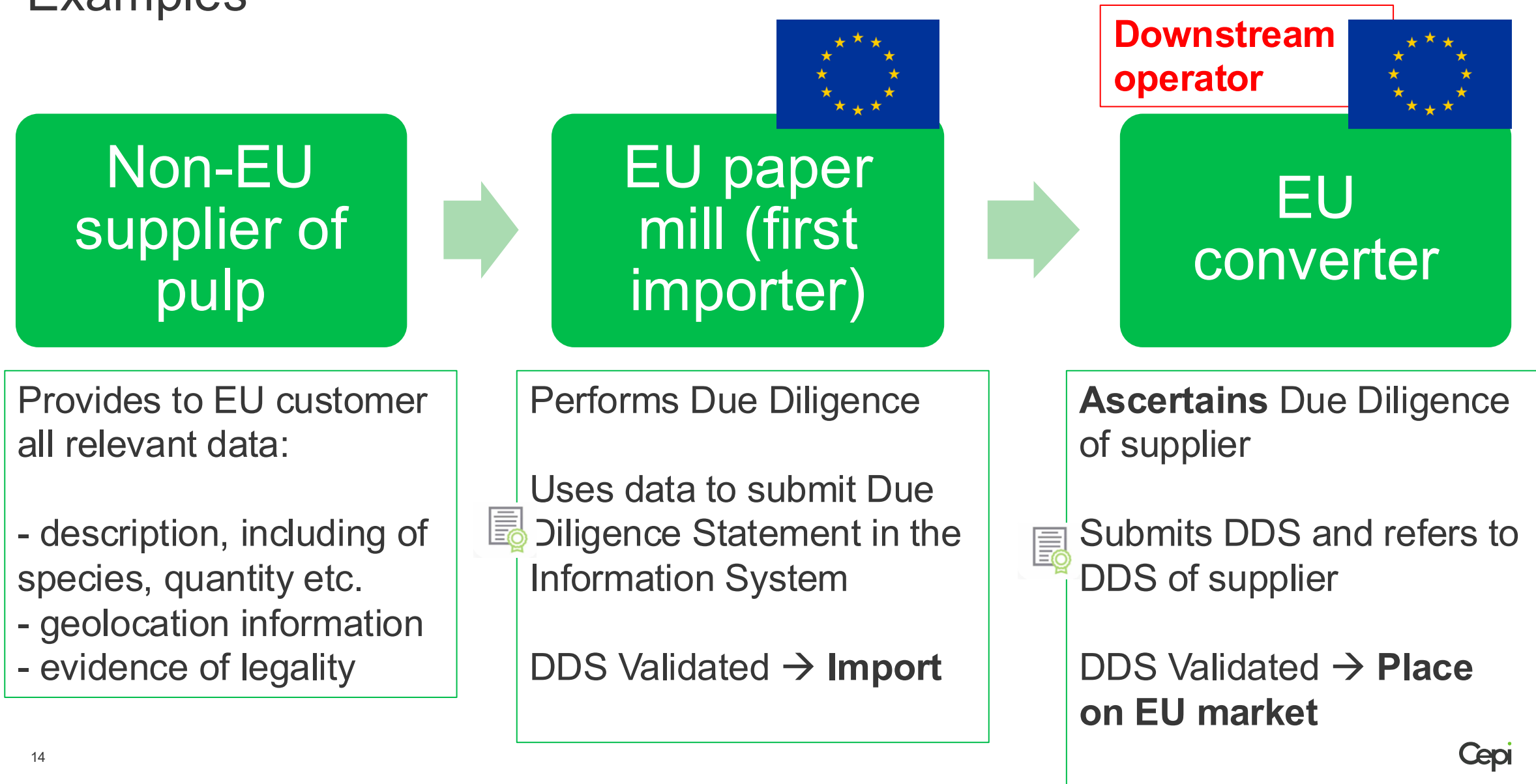
Obligations of operators – FAQ 3.4

First operator vs downstream operator

Downstream operators are those who **place on the market** or **export** relevant products listed in Annex I whose components or ingredients (all of them) have **previously been subject to due diligence under EUDR** and have been the **object of a DDS** submission.



Examples



What does it mean to “ascertain”? FAQ 3.4

Basic obligation (**systematic**):

- collect the reference numbers and verification numbers of DDS submitted upstream
- verify the validity of the reference numbers.
- submit a due diligence statement (DDS) and refer to previous DDS

Possible further assessment (e.g. **every year**)

- check the information provided in previous DDS regarding country of production use the country benchmarking;
- use the public report about Due Diligence of the supplier;
- use the results of audits
- request further information on a voluntary basis

Useful links

- Updated FAQs and Guidance
- Contact list of Competent Authorities
- Information System-related documents

All available here:

https://environment.ec.europa.eu/topics/forests/deforestation/regulation-deforestation-free-products_en

EU-US TRADE TARIFFS UPDATE

FEPE Marketing Committee meeting
Brussels, 3 June 2025



EU-US trade tariffs - update

Bernard Lombard
Cepi Trade & Industry Policy Director

President Trump's announcements and US Tariffs – update

- **4 March:** US tariffs of **20%** (instead of 10% from 4 Feb.) on **ALL imports from China, to date 145% tariffs on all goods** (except smartphones, etc.) and **China: 125% tariff on ALL imports** (except dissolving pulp) **from US – from 12 May: US tariff is 30% and China tariff 10%**
- **12 March:** US tariffs of **25%** on **ALL imports of steel, aluminum, and derivative products**
- **3 April:** US tariffs of 25% on **ALL imports from Canada and Mexico, except goods covered by the regional trade agreement USMCA (like pulp & paper)**
- **3 April:** US tariffs of 25% on **ALL imports of cars, light trucks and car parts (from 3 May)**
- **5 April:** US tariff of **10%** on **all goods and all trading partners**
- **9 April:** “reciprocal tariffs” on **ALL imports from countries (including the EU: 20%, then 50%) that are considered to be treating the US unfairly – 90-day pause announced by US President on 9 April!!**

=> EU pulp (and recovered paper), paper & board and almost all converted paper & board products exports to the US are impacted by the 10% tariff since 5 April and as of... 9 July (TBC) by a 50% tariff

President Trump's announcements and US Tariffs – US Courts' rulings

29 May: 2 U.S. Courts have ruled the IEEPA tariffs (the global 10% and threatened increases, plus the Mexico/Canada/China Fentanyl tariffs) are invalid. However, the US government appealed the rulings...

What does this mean?

- Two U.S. Courts have ruled the IEEPA tariffs are invalid. This includes the global 10% and threatened increases, plus the Mexico/Canada/China Fentanyl tariffs. This does not affect Sections 301 and 232 tariffs
- The Court of International Trade ruling was the most expansive and ordered U.S. Customs to stop collecting the duties within 10 days
- The government appealed the rulings immediately - the U.S. Court of Appeals for the Federal Circuit
- For now, there is **no change: the 10% for the EU remains in place** while the courts decide what to do
- The appeals court might decide to keep the stay in place during the appeals process (10% tariff continues to be collected), or it might decide to lift the stay (10% tariff removed during the appeals process)
- Whatever happens, the next step is to go to the U.S. Supreme Court!
- It remains unclear whether a final ruling that the duties are invalid would mean reimbursement. We would expect this to be the case (reimbursement of duties paid plus interest), up to the courts!
- Finally, should the lower courts' decisions be affirmed in the end, we would expect the administration to explore other options to impose tariffs using other legal authorities...

US national security Section 232 investigation against imports of “timber, lumber, and their derivative products”

- **1 March:** initiation of a US national security Section 232 investigation against imports of “timber, lumber, and their derivative products” (such as pulp and paper) to be completed by 26 Nov. 2025
 - => *If a threat to US national security is found, it should lead to duties on all sources of imports including pulp and paper & board products from the EU***
- Any article which becomes subject to national security investigation section 232 duties will be exempted from reciprocal tariffs
 - => *If and when pulp and paper & board is captured by Section 232 tariffs later this year, the 20% / 50% duty would be replaced by the Section 232 duty. These two types of duties would hence not be cumulated***

EU imports a lot of pulp from the US and exports a lot of P&B to the US - EU exported for €3 bn of pulp and P&B, imported for €1.7 bn

EU27 imports from the US

In tonnes, 2024

EU27 exports to the US

EU pulp imports - 975 kt, 13% of all EU imports

EU P&B imports - 722 kt, 14% of all EU imports

- 55 kt of graphic papers, 3% of all imports
- 611 kt of packaging paper & board, 24% of all imports
- 12 kt of sanitary & household paper, 2% of all imports

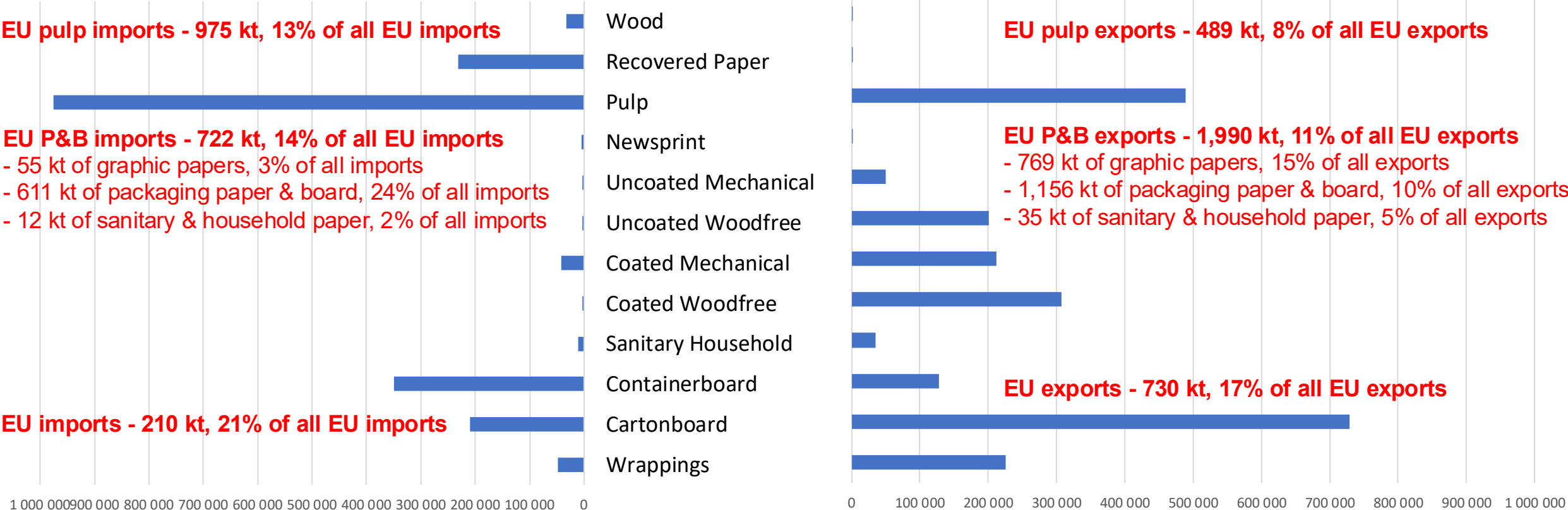
EU imports - 210 kt, 21% of all EU imports

EU pulp exports - 489 kt, 8% of all EU exports


EU P&B exports - 1,990 kt, 11% of all EU exports

- 769 kt of graphic papers, 15% of all exports
- 1,156 kt of packaging paper & board, 10% of all exports
- 35 kt of sanitary & household paper, 5% of all exports

EU exports - 730 kt, 17% of all EU exports



Source: Eurostat

The EU and the US had no import tariffs on pulp, paper & board, converted paper products and printed products since January 2004, as a follow-up to the 1994 Uruguay Round sectoral agreement 

EU's reactions to US tariff of 25% on ALL imports of Steel & Aluminium and US tariff of 25% on cars and 10% general US tariff on all EU goods

EU's reactions to US tariff of 25% on ALL imports of Steel & Aluminum

- **EU retaliation – 2 implementing acts published on 14 April:**

EC implementing regulation 2025/778 – “rebalancing measures”:

- From 15 Apr. 10% and 25% on imports of the products in Annex I - some **converted P&B products (tissue products)**
- From 16 May 25% on imports of products in Annex III - some **mechanical pulp, some P&B (containerboard), some converted P&B products** (envelopes, toilet paper, cartons, boxes, sacks, stationery, etc.), some printed products (books, catalogues, leaflets, etc.)

EC implementing regulation 2025/786 - suspension: ALL additional duties on US imported products under the rebalancing measures will be **suspended until 14 July 2025**

EU's reactions to US tariff of 25% on cars and 10% general US tariff on all EU goods

- **8 May: a list of US goods (covering most pulp & paper grades) which could become subject to EU additional countermeasures**, if ongoing EU-US negotiations do not result in a mutually beneficial outcome and the removal of the US tariffs - **open consultation until 10 June, EU vote early July**

=> All P&B grades are covered through the EU Regulation 2025/778 or the EC draft list published on 8 May, except a few pulp grades

Cepi's press release – 18 March 2025

Cepi calls on EU Commission to continue negotiations on US tariffs to avoid supply chain disruptions

Cepi advocates for a **'negotiation first'** approach. But in the event negotiations fail and US tariffs on EU exports of pulp, paper or board would be imposed, Cepi urges the EU Commission:

1. to **respond quickly, vigorously and in a proportionate manner** with EU restrictions on imports of US goods and services. If, however, US tariffs do not cover EU pulp, paper and board products, such EU retaliation should similarly exclude US pulp, paper and board products;
2. to **exclude from such EU retaliation list products that risk being in short supply in the EU**; and
3. to **monitor and address possible trade flows from third countries** that may flood the EU market because of US tariffs, including by means of using EU trade defence instruments to protect the EU industry.

Since a multilateral agreement of all major pulp and paper producers in January 2004, there have been no import tariffs on both sides of the Atlantic, to the benefit of both US and EU businesses and consumers.

Thank you!



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Cepi aisbl
Confederation of European Paper Industries
Avenue Louise 250, box 80
B-1050 Bruxelles
+32 2 627 49 11
cepi.org @CEPI_paper in Cepi

GREEN CLAIMS DIRECTIVE UPDATE

Cepi

Green Claims Directive



European
Commission

Circular Economy Action Plan

The European
Green Deal

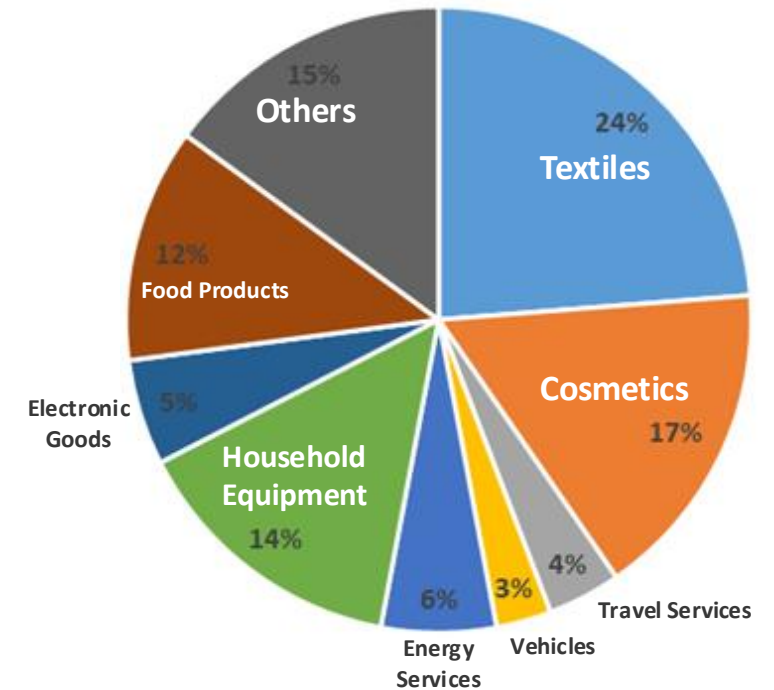
March 2020
#EUGreenDeal



WHAT ARE THE OBJECTIVES?

- **Protect** consumers and companies from greenwashing
- **Enable** consumers to contribute to accelerating the green transition by making informed purchasing decisions based on credible environmental claims and labels
- **Boost** the competitiveness of economic operators that make efforts to increase the environmental sustainability of their products and activities
- **Improve** legal certainty and create cost-saving opportunities for such operators that are trading across borders.
- **Accelerate** the green transition towards a circular, clean and climate neutral economy

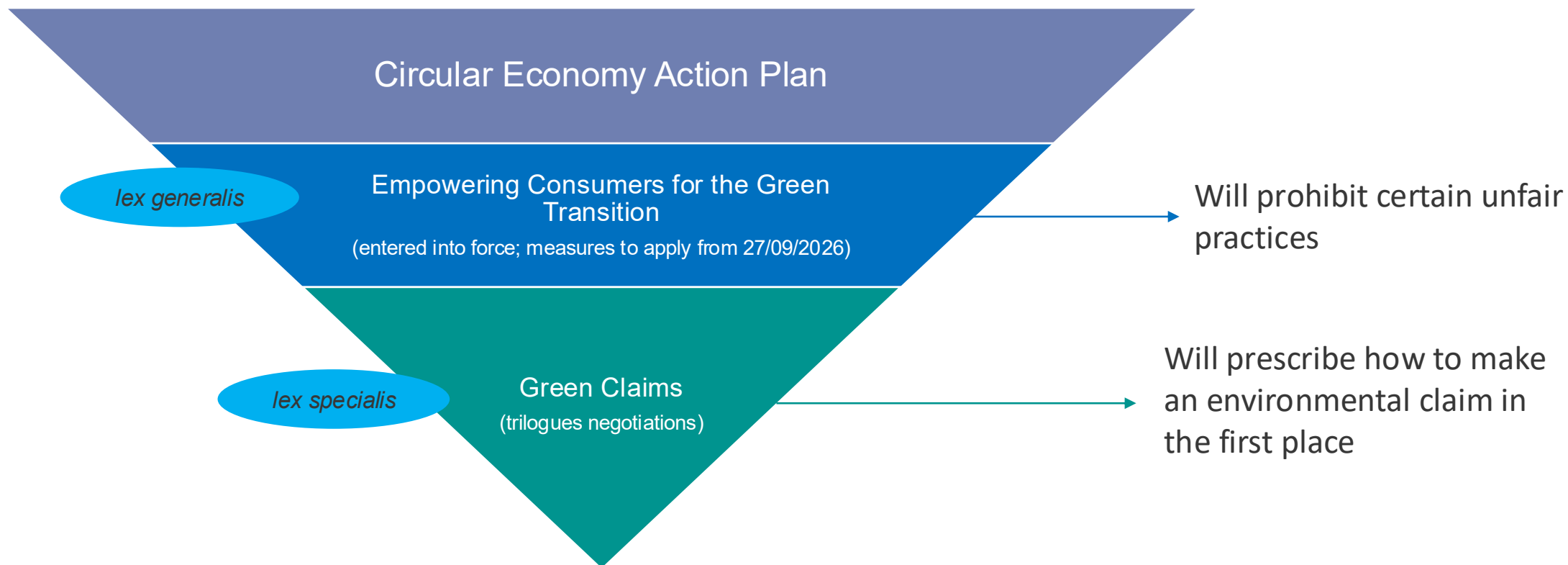
2020 Sweep of misleading sustainability claims*



53% of claims provide **vague, misleading or unfounded** environmental information on the product.

40% of claims were unsubstantiated.

* Source: *European Commission*



The Commission's Objective: every single claim and label that is put on the market adheres to minimum requirements that are confirmed by verifiers in the Member States.



All green claims will have to go through an ex-ante verification procedure by an officially accredited independent body.

WHAT WILL THE GREEN CLAIMS DIRECTIVE CHANGE?

The GCD is targeting B2C practices. But Member States can in theory choose to extend the scope to B2B.

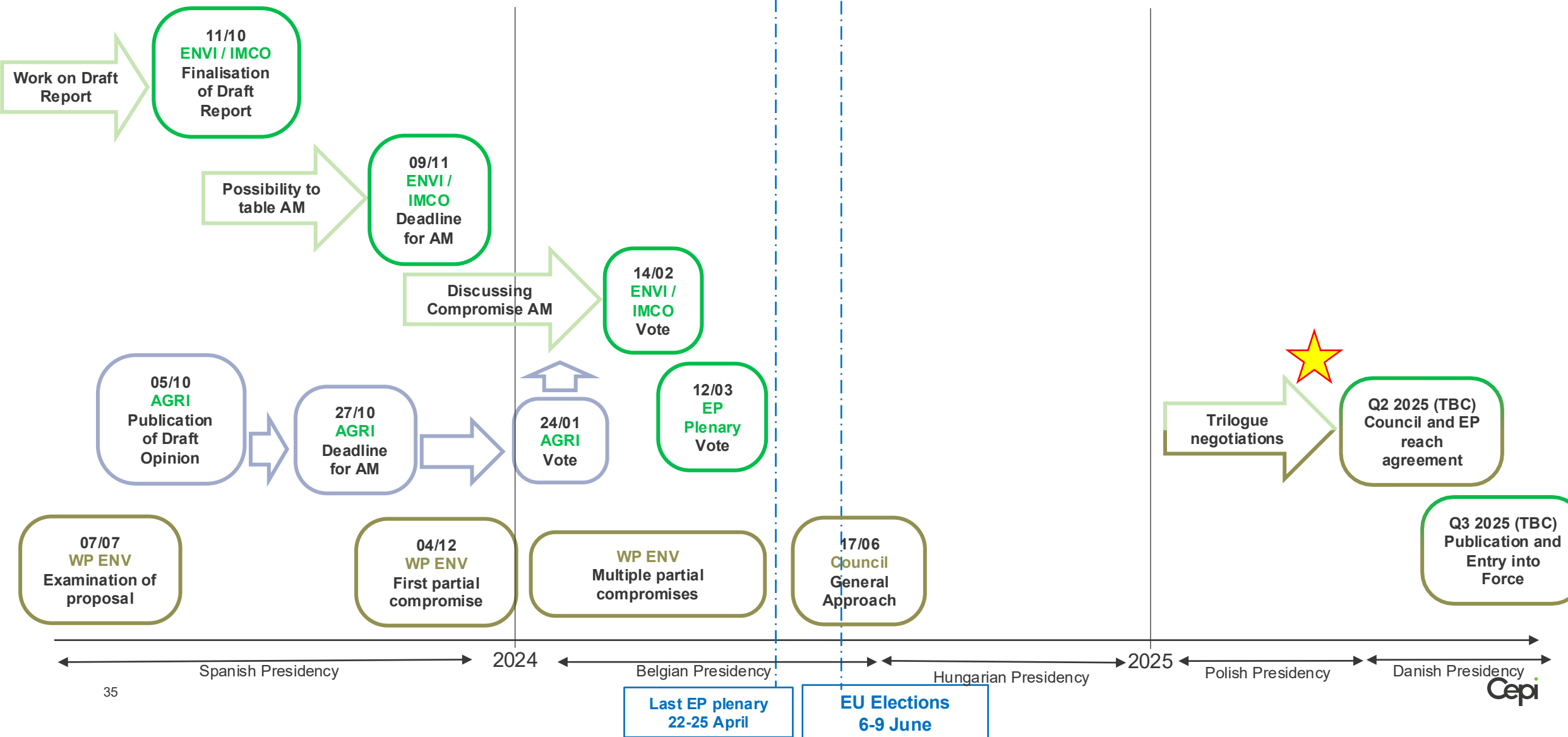
The proposed directive would establish minimum requirements on the substantiation and communication of voluntary explicit environmental claims.

Explicit green claims = an environmental claim that is in textual form or contained in an environmental label (*per the Commission's proposal*)

Environmental labelling schemes will have to adhere to minimum governance requirements as well.

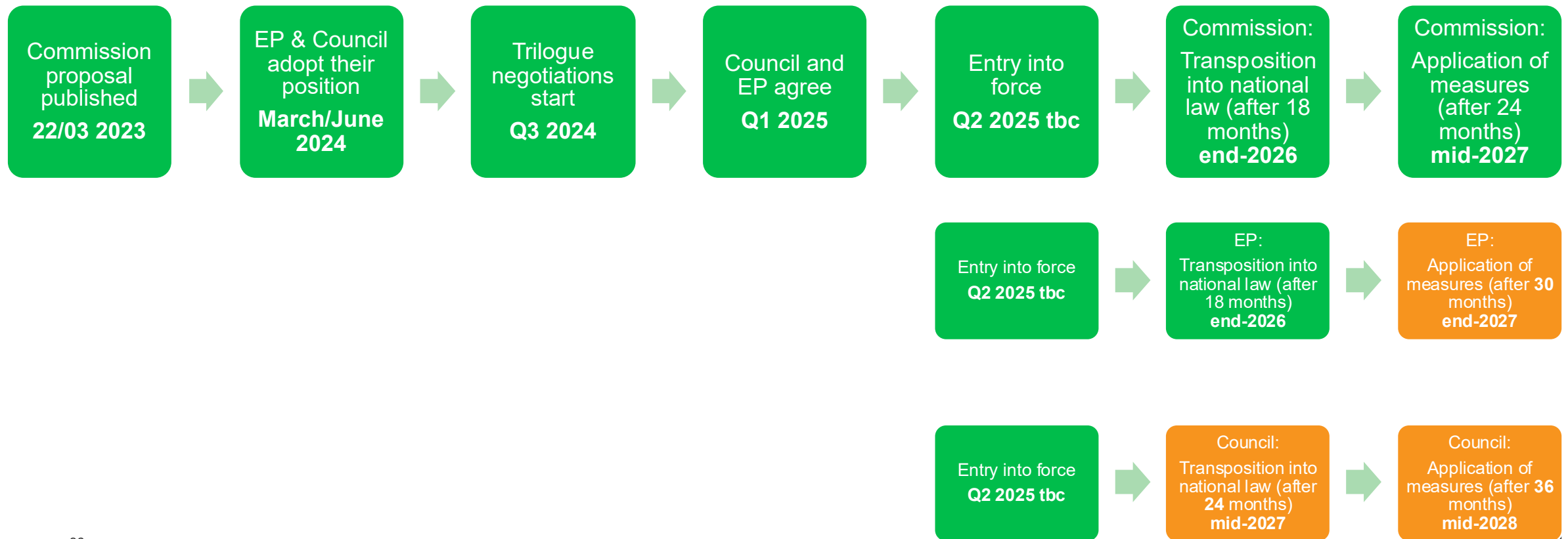
All environmental claims and labelling schemes will have to go through an ex-ante verification procedure by an officially accredited independent body (*per the Commission's proposal*).

GREEN CLAIMS DIRECTIVE - TIMELINE

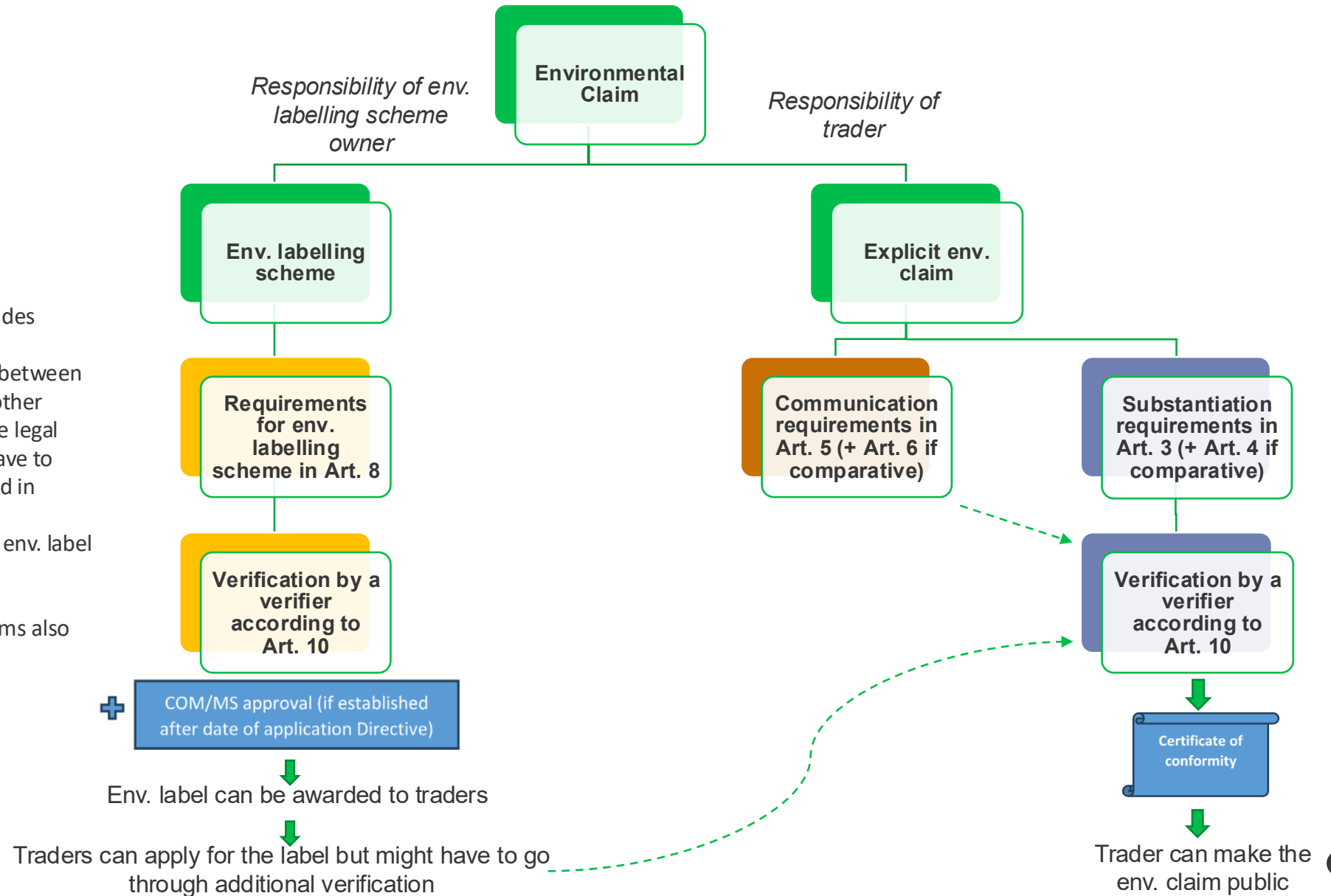


EXPECTED ENTRY INTO FORCE

The date of entry into force and from when onwards the measures have to be applied still depends on the success of the trilogue negotiations, and the agreement the institutions reach there.



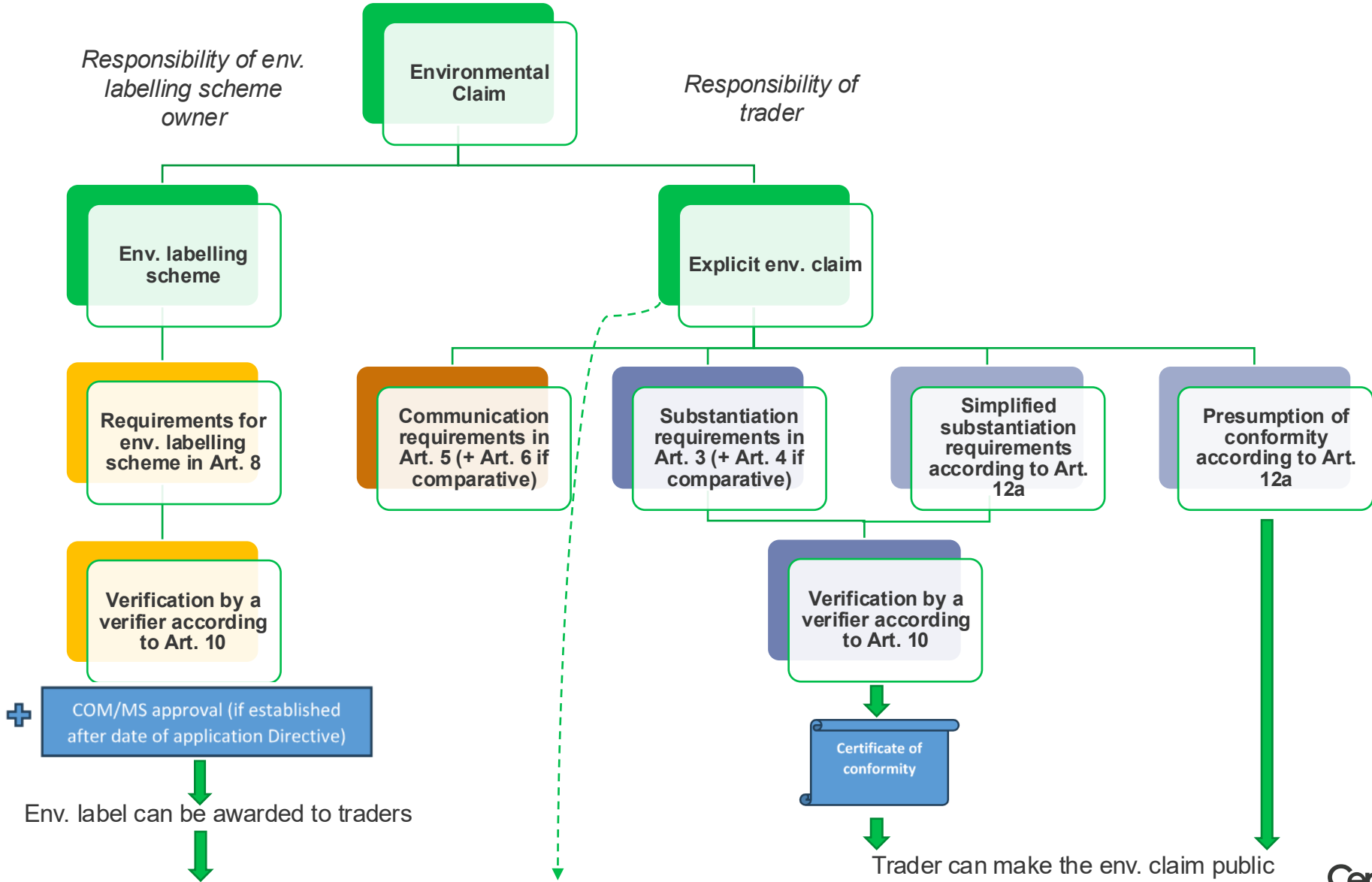
DECISION TREE – COMMISSION PROPOSAL



Unclear:

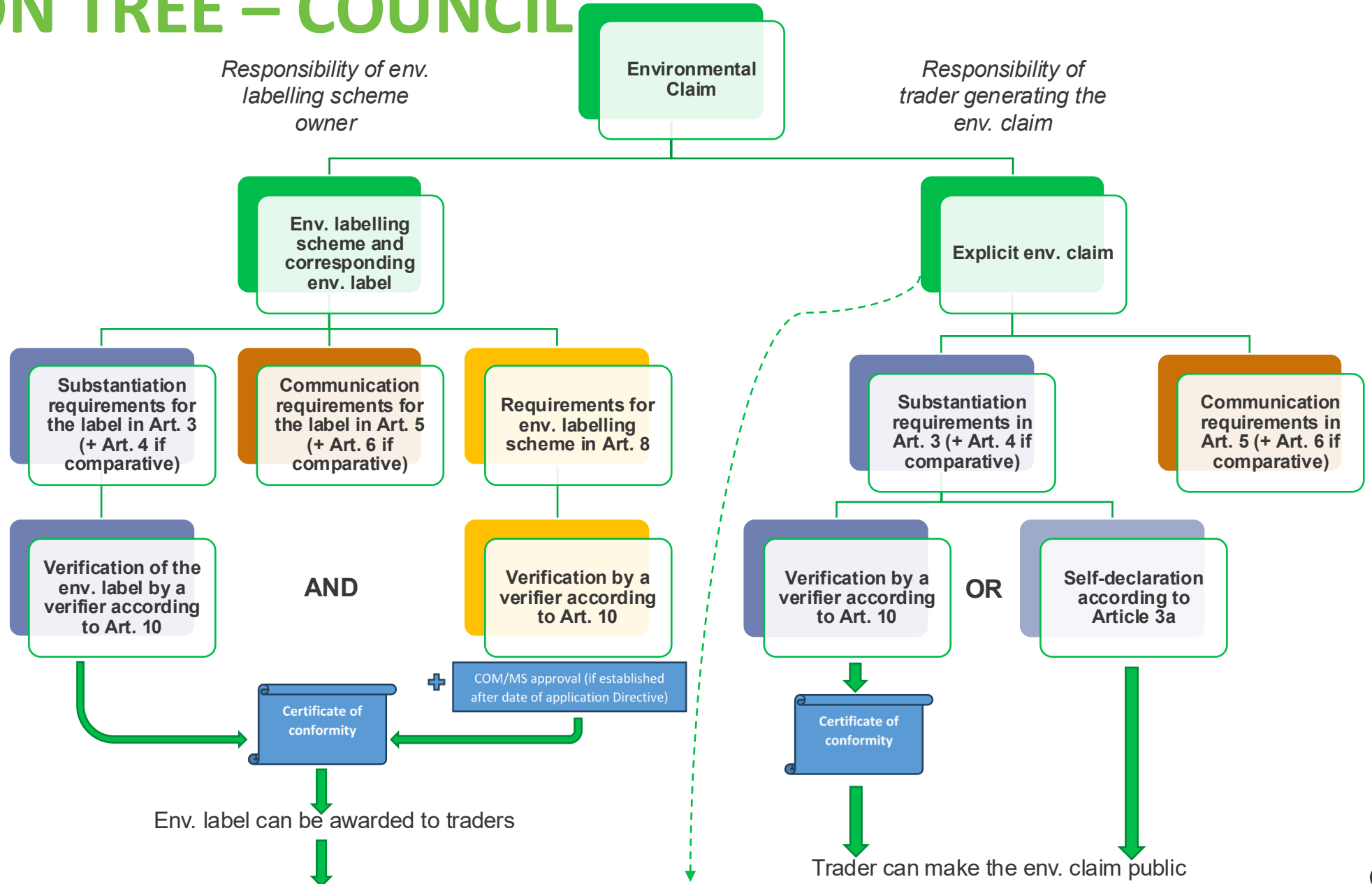
- Definition of explicit env. claim includes environmental labels.
- Because of that, the differentiation between provisions that apply to labels and other explicit claims is not very clear in the legal text. E.g. do environmental labels have to fulfil the same requirements as listed in article 3?
- Do companies have to apply for the env. label and still go through the verification procedure?
- Does the communication of the claims also have to be verified?

DECISION TREE – EUROPEAN PARLIAMENT



Traders can apply for the label and can (without additional verification) display the label awarded to them provided they respect the communication requirements in art. 5 and 6

DECISION TREE – COUNCIL



Traders can apply for the label and can (without additional verification) display the label awarded to them provided they respect the communication requirements in art. 5 and 6

STATE-OF-PLAY: EX-ANTE VERIFICATION PROCEDURE

Normally, all environmental claims will have to go through a ex-ante verification procedure by a third party verifier.

Exemptions:

- Claims about environmental characteristics covered by other legislation
 - Compliance according to the other legislation
- Trader was awarded environmental label
 - No additional verification necessary to display label
 - Trader can make claims based on that environmental characteristic

SIMPLIFIED SUBSTANTIATION (NO THIRD PARTY VERIFICATION) – STILL UNDER DISCUSSION

The Commission is still not in favour of a simplified procedure, but has suggested a possible procedure.

Eligible claims:

- is related to a single environmental characteristic,
- does not require substantiation by means of a full LCA, and
- does not concern an environmental characteristic that leads to significant trade-offs between different environmental impact categories

Commission is offering two options: Listing the types of claims in the main Directive OR in secondary legislation.

However, additional transparency requirement: Needs to state that

- the claim benefits from simplified substantiation requirements
- it was not verified by a verifier

FUTURE OUTLOOK AND CONSEQUENCES

- Even though the scope is intended for B2C, Member States might extend the scope to B2B. Rather be on the safe side and adhere at least to ECGT as well. Lines between B2C and B2B blur when customers replicate claims, e.g. when they use packaging with claims on it that also reaches the consumer.
- The ex-ante verification procedure will definitely come; however, it is likely that some claims will be covered by simplified requirements; a presumption of conformity is unlikely.
- Customers will probably request more information so that they can make their claims. Additionally, they will want more information on B2B claims that they replicate, e.g. labels on the packaging.
- The use of environmental labels might get more prominent to avoid the verification process.
- Claims on products that contain hazardous chemicals might get restricted in the future (not immediately).



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Avenue Louise 250, box 80
B-1050 Bruxelles
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NEW FEPE MEMBER – CARTIERE SACI

STATISTICS AND MARKET REPORTS

ENVELOPE MARKET UPDATE 2025

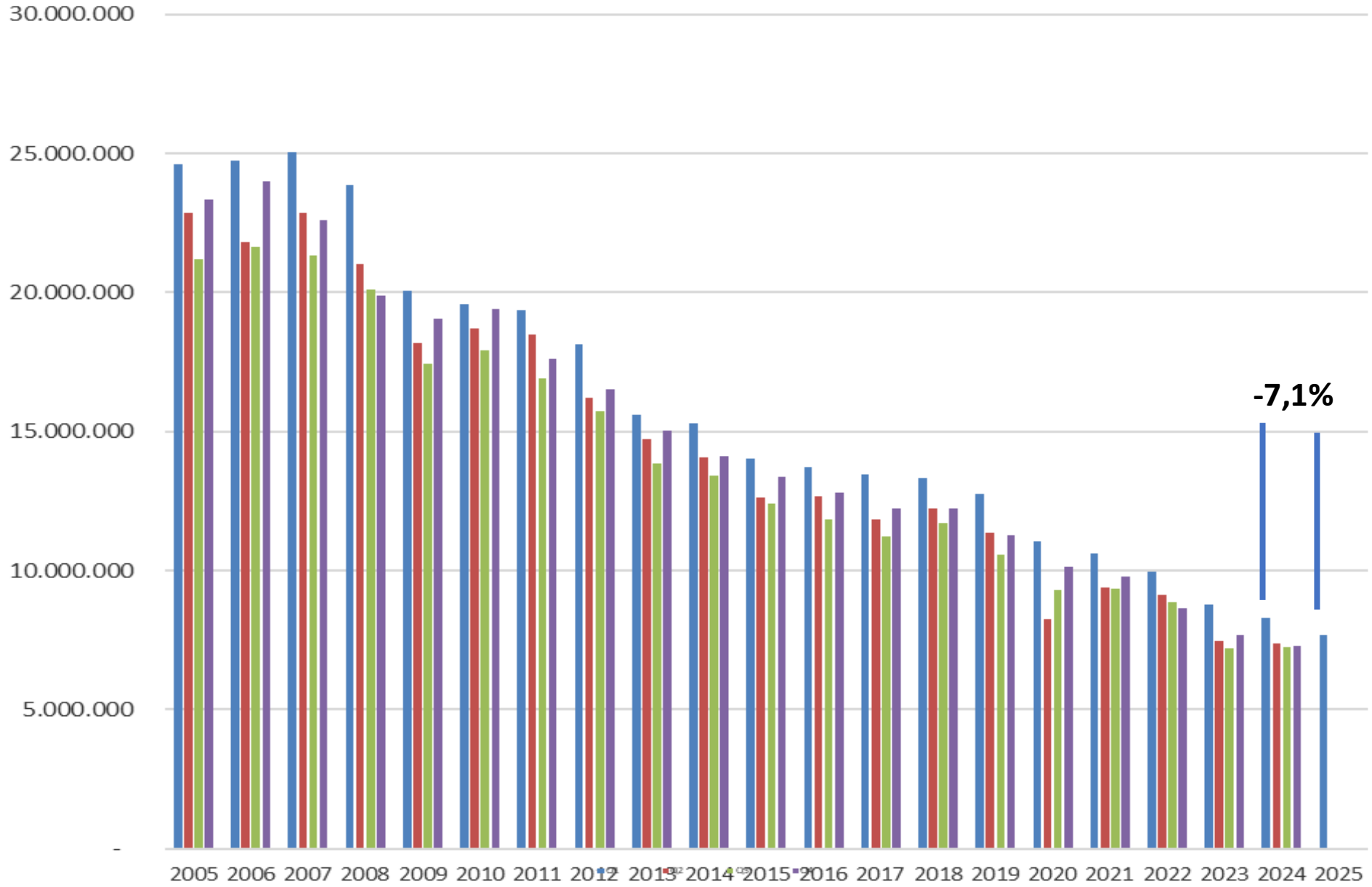
Udo Karpowitz



Sales volumes in the European envelope industry deteriorates again

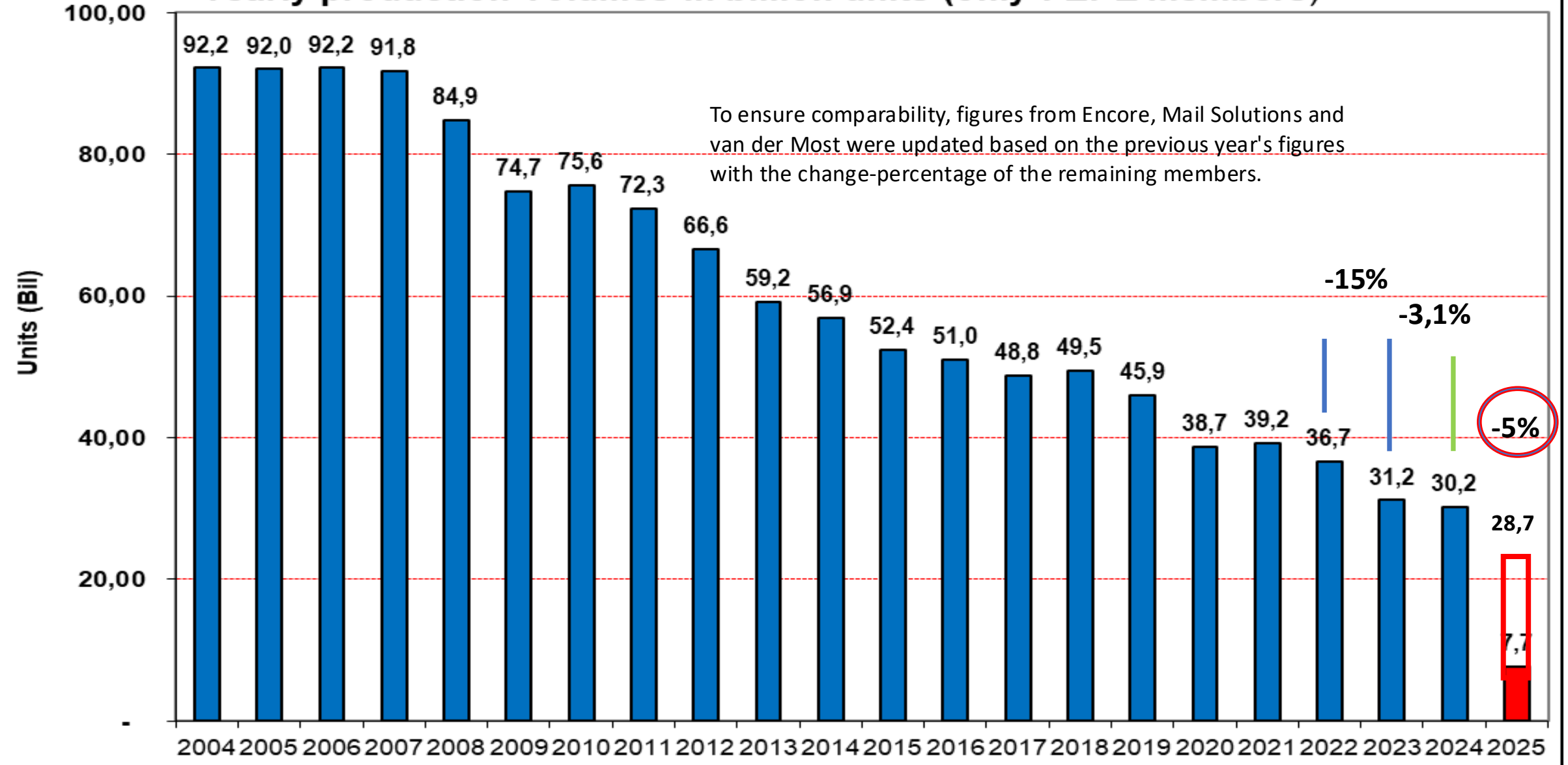
- 1-12.24: -3,1% below previous year
- Q4.24: -5,0% below previous year
- Q1.25: -7,1% below previous year
- Moderate decline of 2024 was however above the long-term trend of our industry.
- Volume Q1.25 was 586 million pcs. below the previous year
- European market volume 2024 incl. non members was in-between 35 and 36 billion pcs.

Quarterly Deliveries Trend



Yearly production volumes in billion units (only FEPE members)

To ensure comparability, figures from Encore, Mail Solutions and van der Most were updated based on the previous year's figures with the change-percentage of the remaining members.



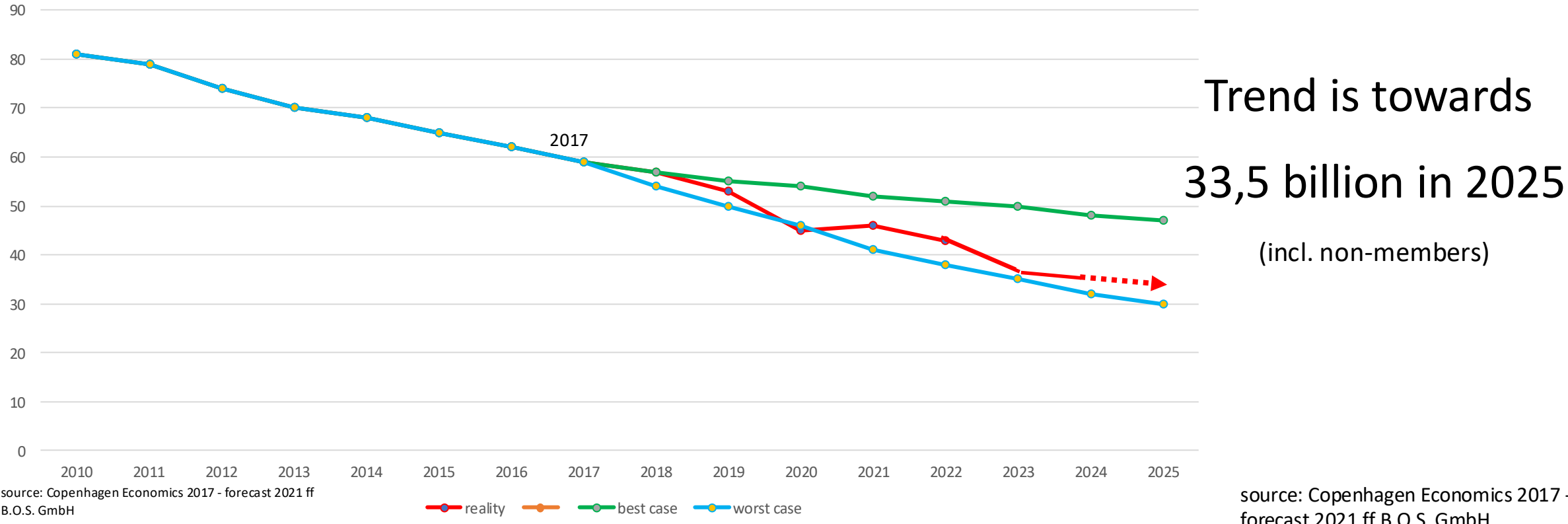
ENVELOPE MARKET UPDATE

Some reasons:

- DM-Business: According to Nilsen, more or less only digital channels benefited from the recovery in 2024.
- Our direct mail business (incl. overprinting) is still far below pre-Corona levels.
- Inserting envelopes: more or less in line with long term trend
- Online-Business saw a weak period in-between 2022-2024
- But inflation-adjusted growth is expected for 2025 (up to 10%)

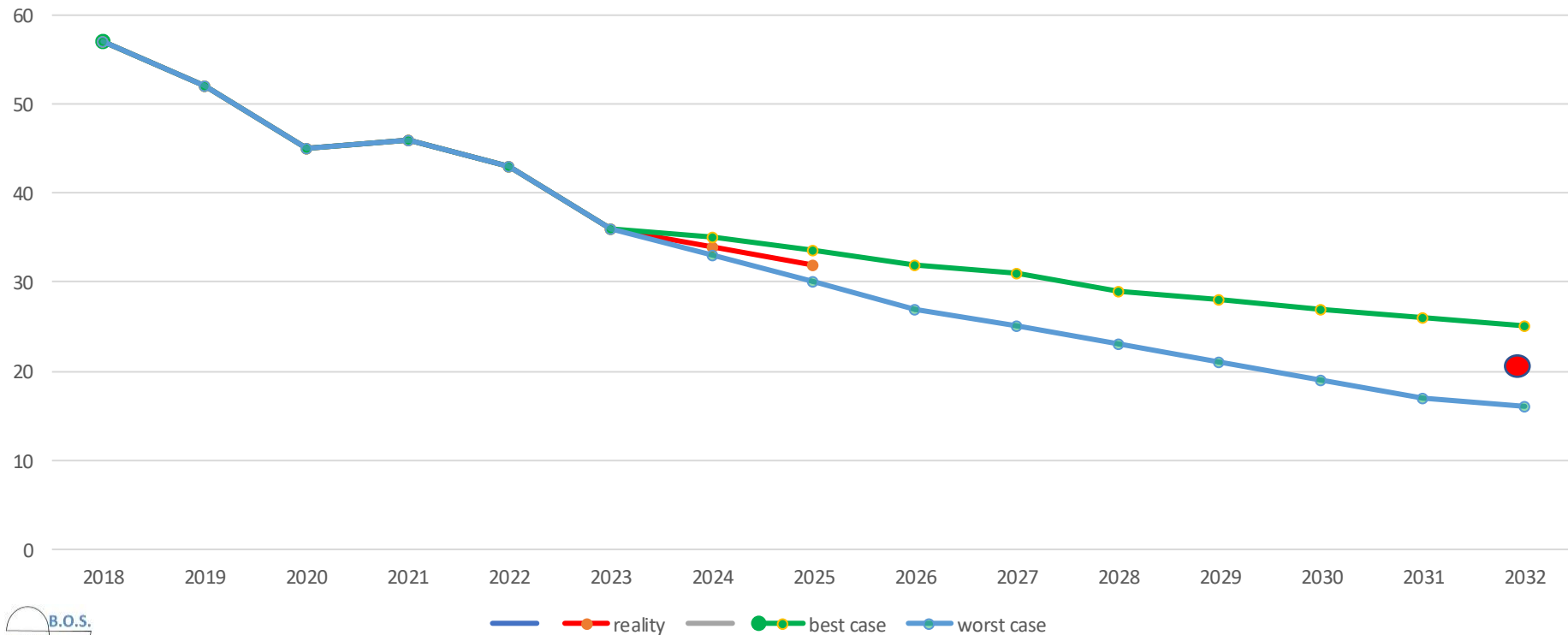
ESTIMATE OF EUROPEAN LETTER MAIL VOLUME DEVELOPMENT, 2017-2025 IN BILLION PCS. (UPDATE STUDY COPENHAGEN ECONOMICS)

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, 2023-2032 IN BILLION PCS.

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



Trend is towards
20 billion in 2032

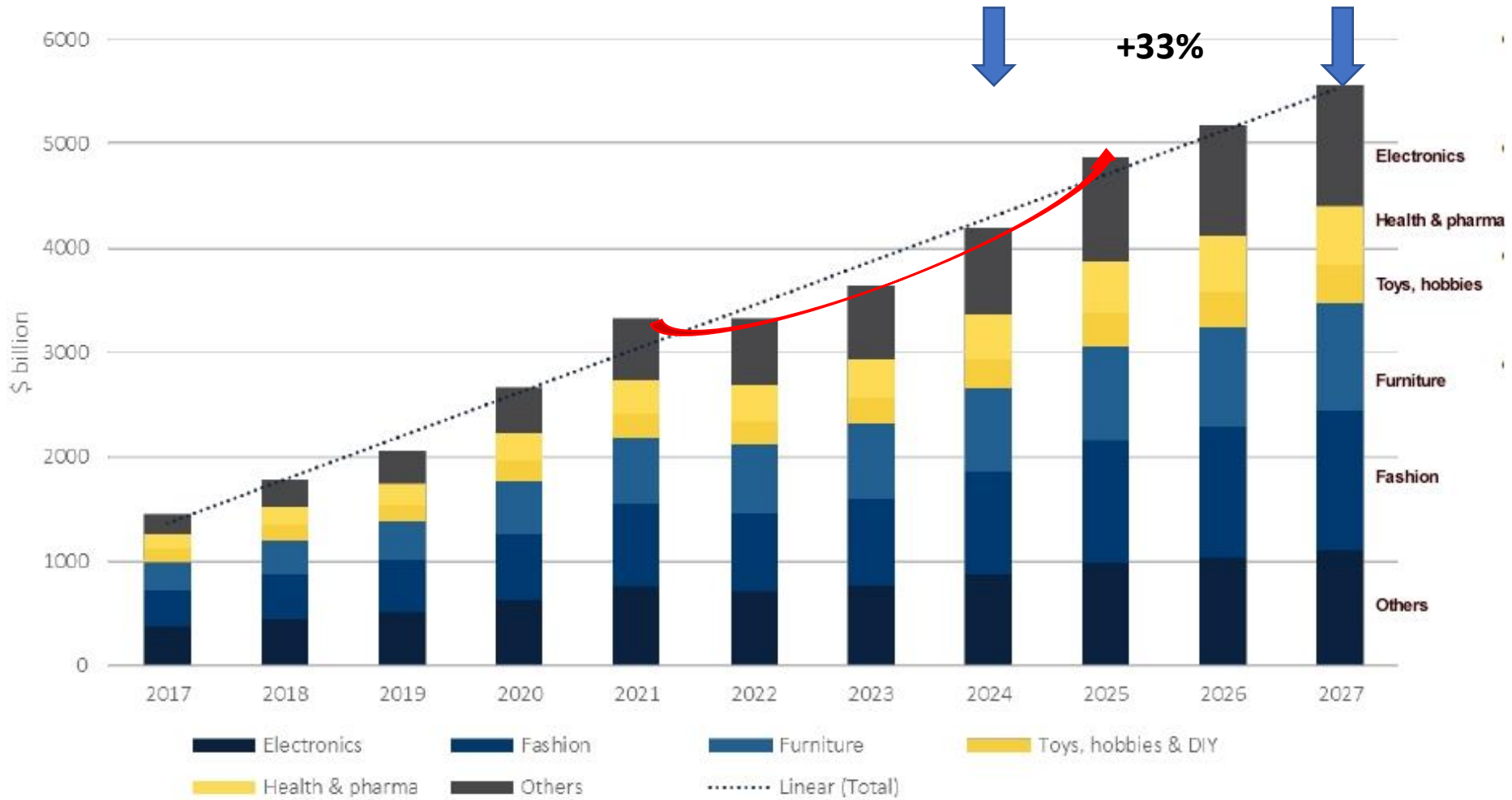
(incl. non-members)

We will lose another 40%
of our market volume in
the next 10 years

E-COMMERCE IS GETTING MORE AND MORE IMPORTANT IN EUROPE AND GLOBALY

- In Germany, the volume of envelopes fell to 8.2 billion pcs. in 2024.
- In the same period the volume of shipped parcels rose to 4.5 billion !!

GLOBAL B2C E-COMMERCE GROWTH 2017 - 2027



Source: Data from International Trade Administration

ALSO, PAPER INDUSTRY IS SUFFERING AGAIN



BACK IN MINUS SINCE Q4.24



		Euro Graph			versus	FEPE		
		Euro-Graph 2005 =100				FEPE 2005 =100		
2022	1	346.427	-12,60%	58,9		9.970.186	-6,10%	43,3
	2	322.372	-15,40%	54,8		9.134.577	-2,80%	39,7
	3	336.319	-2,30%	57,2		8.882.375	-5,00%	38,6
	4	270.780	-27,40%	46		8.665.868	-11,50%	37,7
2023	1	268.904	-22,40%	45,7		8.778.399	-12,00%	38,2
	2	234.829	-27,20%	39,9		7.471.172	-18,20%	32,5
	3	221.452	-34,20%	37,7		7.215.110	-18,80%	31,4
	4	245.578	-9,30%	41,8		7.691.026	-11,20%	33,4
2024	1	294.358	9,50%	50,1		8.279.286	-5,70%	36,0
	2	280.810	19,60%	47,8		7.392.106	-1,10%	32,1
	3	237.728	7,30%	40,4		7.224.812	0,10%	31,4
	4	233.513	-4,90%	39,7		7.310.418	-5,00%	31,8
2025	1	288.480	-2,00%	49,1		7.693.292	-7,10%	33,4

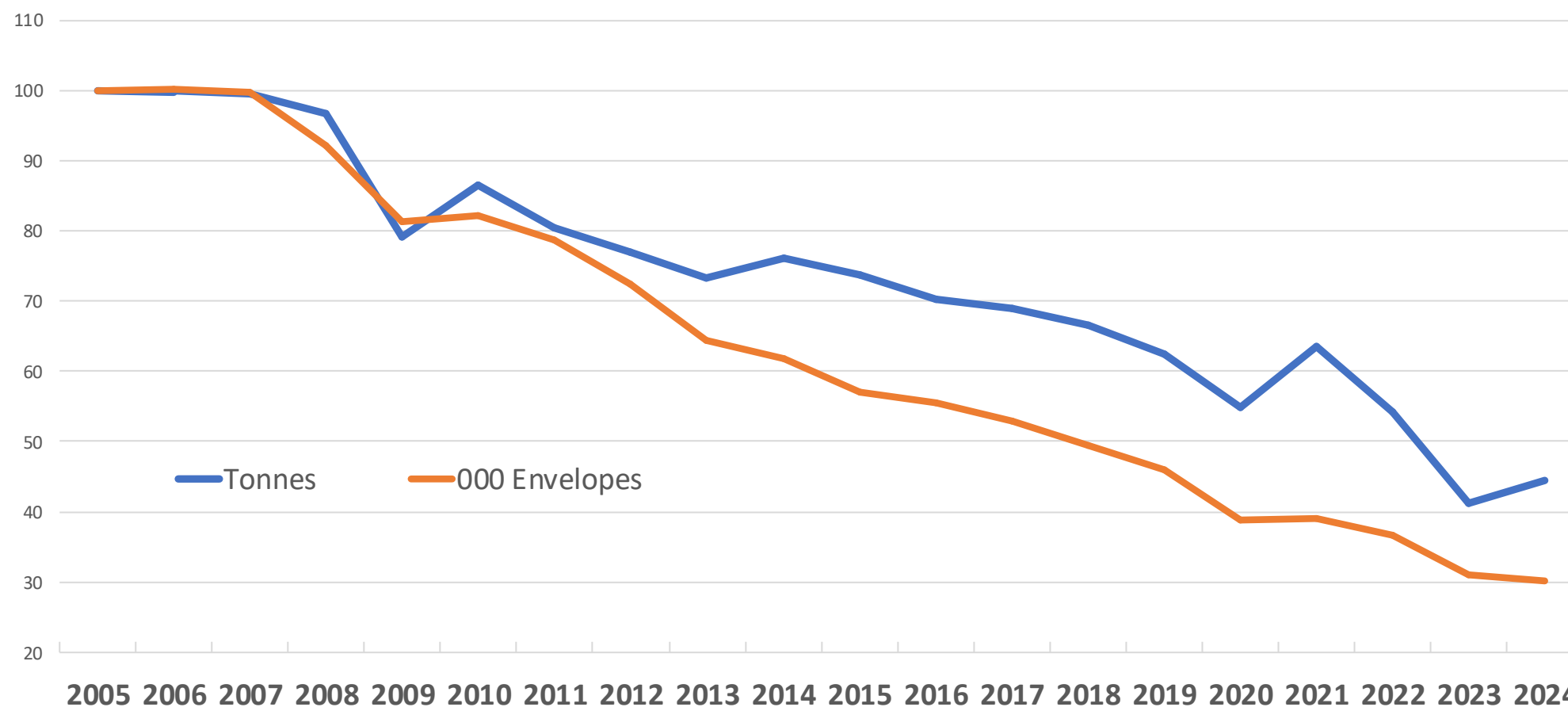


VOLUME-INDEX 2005=100

Euro Graph

versus

FEPE



Manufacturer report: Germany

Envelope Manufacturers:

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

Economy:

GDP 25: 0.0 %
 Inflation 25: +2,1 % as of April 2025
 Unemployment rate 12.24: 6,1 %

GFK Consumer index 2010= 0: - 20,6 (!) as of May 2025

Post and Postal Partners



Deutsche Post with worse service in future

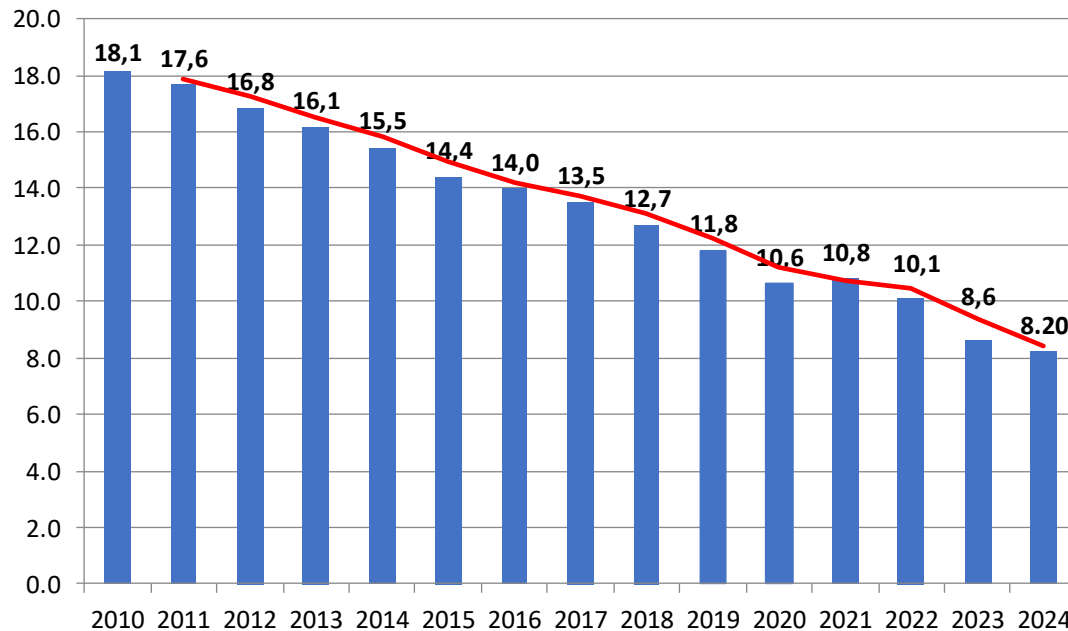
- Letters from Deutsche Post are allowed to travel significantly longer.
- No more mail deliveries on Mondays
- Since 1. of January 25 increase of the standard postage from 0,85 € to 0,95 €

E-Commerce / E-substitution

German eCommerce: bevh expects a slow recovery in 2025

- the negative trend of 2023 has been stopped in 2024, however with a growth of 1,1% (not inflation adjusted) eCommerce business remained rather weak.
- Q1.25 saw now a growth of 3,1% (not inflation adjusted)

Absatzmengen BU und VT nur Deutschland 2010 -2024 in Mrd. Stück



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: Nordics

Envelope 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

Envelope Market

- Estimated volume decline -10% in 2025

Post and Postal Partners

- Edita got acquired by Capman and acting management 11/2024
- Universal postal service ended 1.1.2024 in Denmark
- PostNord has decided to stop delivering letter mail in Denmark after 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

- 04/2025 CPI inflation SWE 0,3%, NO 2,5%, DK 1,5%, FIN 0,5%

Manufacturer report: FRANCE

Envelope Manufacturers :

Nothing significant in H1 2025, after a lot to report at the beginning of 2025
 Technic Enveloppes / Papeterie Moderne dismantled, equipment sold

Post and Postal Partners

- Nothing significant in H1 2025

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

Market

2024 La Poste report letter mail volume decline of **- 8,2 % vs 2023**

Volume 5.616 B pieces vs 6 B

2025 Q1 acceptable for remaining market
 liquidation and customer restoration
 Very weak market since beginning
 Forecast : similar volume decline

- La Poste plan envelope market to be

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

2024 (FEVAD report) :

E Commerce (products) TO + + 6 % back to 2021 level / transaction volume + 11 %

2025 : very dynamic market

Miscellaneous

• GDP 2024 : + 1,2 % 2025 : forecast ~ 0,5 / 1 %

Unemployment : 7,4 % -> 8 % slight increase

Inflation : 2024 -> 1,8 % 2025 -> ~ forecast 1 %

Businesses bankruptcies at high level

Good news !? : Political uncertainty undermines administrative stability ☹



Manufacturer report: Spain & Portugal – June 2025

Envelope Manufacturers

- Concern about falling demand
- 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

- Significant drop in consumption in large accounts.
- Big halt in Market in the last two months. Important decreases (20% 25%) affecting even medium-sized consumers.
- Sharp drop in prices.

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 in Spain is experiencing continued growth
 - With a significant increase in both turnover and the number of online shoppers.
- Turnover exceeded 99.2 billion euros in 2023, a 16% increase from the previous year, and the number of online shoppers reached 30 million.

Miscellaneous

	<i>Spain</i>	<i>Portugal</i>
• GDP:	2,8 %	1,6 %
• Inflation:	+ 1,3 %	+ 1,6%
• Unemployment:	10,9 %	6,5%
• Population:	48,6 Mio	10,5 Mio

Manufacturer report: South East

Envelope Manufacturers

Post and Postal Partners

Envelope Market

E-Commerce / E-substitution

Miscellaneous

Supplier Product Report: Arctic Paper

Manufacturers

- Paper machine modernization at Arctic Paper Grycksbo is underway
- Investments in sheet cutting lines have been made at both the Kostrzyn and Munkedal mills
- The challenging market environment continued to pressure our profitability
- We prioritize ongoing initiatives and the decision of the new investments have been suspended to mitigate impact of the current difficult market conditions.

Environmental

- **Ongoing project in the energy segment:**
- PV installation 9,6 MW PV (Kostrzyn) will be completed in June 2025
- Modernisation of biomass boiler (Grycksbo) according to the plan – start up November 2025 – to reduce energy cost for paper production proces
- Wood pellet production line with capacity 50 kt/y (Grycksbo) according to the plan – start up November 2025 – new business line
- Preparation for installation electric boiler 20 MW (Kostrzyn) – utilisation of surplus cheap energy in Polish grid – to reduce energy cost for paper production proces

Group will have over 30 MW of PV installed capacity by the summer of 2025

Market

- Low demand for both UWF, CWF in H1 2025
- Stable demand in book paper segment in first months of 2025
- Production costs have risen, primarily driven by an increase in pulp prices during Q1 2025.
- Market prices remain flat, constrained by low industry operating rates and cautious buying behavior.

Miscellaneous

- With EUDR on the horizon, customer pressure for traceability and sustainable sourcing is intensifying
- We are working towards full compliance with EUDR requirements and we expect to achieve compliance before the end of 2025 (according to our Sustainability Department)

Supplier Product Report: Gascogne Papier & Gascogne Flexible



Manufacturers

- Gascogne Papier is launching new ADOUR 2025® MG Kraft: natural shade, special ribbing , suitable for food contact

Market

- Growing demand for Clay Coated siliconized paper for envelopes e-commerce

Environmental

- Gascogne Flexible ESG performance has been evaluated by ECOVADIS at 68/100, customers are invited to connect.

Miscellaneous

New French Gascogne Papier MG brown kraft paper mill construction is moving forward



Supplier Product Report: Supplier

Manufacturers

Schönfelder Papierfabrik:
 New Biomass Heat and Power Plant has started. CO₂-emissions are reduced by 33.000 tons/a. Combined with green electricity, certified with origin and PPA (Power Purchase Agreements), CO₂ emissions for production is reduced by 93%.
 A1 and A2 category wood and green waste are used, i.e. raw materials that cannot be put to other usage.
 The investment of about 30 Mio Euro has been made together with the contracting partner GETEC.

Market

Miscellaneous

Environmental

Supplier Product Report: Supplier UPM

Manufacturers

- Nordland PM3 closed in December 2024
- Plan to close Ettringen mill during summer 2025 (News & SC)
- PM Specialty Papers will invest over 10 million euros in the modernization of UPM Tervasaari mill to boost capacity and improve production stability in its highly specialized products, such as glassines and flexible packaging papers.

Market

- Seasonally slow market activity
- Structural & cyclical market decline continues
- Impact of tariffs and geopolitical tensions makes forecasting challenging; weighs on economical activity

Environmental

- EUDR > UPM strives to be a frontrunner in implementation. WE aim to be ready during Q2

Miscellaneous

- **New Brand Identity “Renew the everyday”**

We are a material solutions company

We contribute to the sustainable transformation of society with material solutions, utilizing sustainable, renewable feedstocks.

We create long-term value through our extensive portfolio of renewable fibres, advanced materials, decarbonization solutions, and communication papers.

- **Renewed Sales Organisation in Europe > Efficiency & increased customer centricity**

Sustainability targets for 2030



Supplier Product Report: BOPP Window Film/Irplast SpA

Manufacturers

In Q1-2025, overall production volumes were notably high, surpassing budget targets and reflecting a busy operational period. Looking ahead, Q2-2025 appears very promising, with positive prospects on the horizon. Irplast successfully sustained active production lines by diversifying its range of specialized products. Despite the industry-wide trend of extended lead times from BOPP film manufacturers, Irplast has maintained its strategic approach for flexibility, achieving consistent lead times of approximately two working weeks.

Environmental

Together with our new owners, Toppan Specialty Films, Irplast is ever more committed to advancing noble objectives by harnessing BOPP films derived from fossil-free and circular bio-based materials. The use of PCR remains the most sought-after option among our customers, necessitating careful management through pre-reservation of volumes based on availability.

Looking ahead to 2030, we aim for 100% of our BOPP production to be composed of alternative resins, reinforcing our dedication to sustainability and innovation in line with the PPWR and our corporate commitment to keep the environmental credentials of all our products best-in-class.

Market

Effective June 2025, our new Japanese owners, Toppan Specialty Films, will confirm that while the focus of our merger remains on continuity of supply of specialty films designed for recyclability and monomaterial packaging, we anticipate that our collaborative strategies and new initiatives will become more prominent by early 2026 in both the production and sales of mono-PP solutions.

Our fossil-free BOPP film, which is ISCC Plus certified, will be fully available for upcoming projects across the group.

We continue to observe shortages and extended lead times for European-manufactured films from our competitors.

Miscellaneous

Toppan Specialty Films is renowned for its commitment to excellence in the production of premium materials tailored for packaging, labeling, and decorative applications. The packaging division of the company specializes in the development of advanced plastic films, particularly security films and barrier films. Through our collaboration, we look forward to jointly enhancing and strengthening our presence in the market, working together to deliver solutions to make PPWR standard packaging available to all.

The new €62 million LISIM line has started to arrive in Atessa, and construction is under way. Full scale industrial production is confirmed to start in Q1 2026, delivering much awaited capacity for recyclable barrier packaging.

Supplier Product Report: OPS Window Film/Transcendia and 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.

Supplier Product Report: Adhesives - EUKALIN

Manufacturers

EUKALIN confirms that no changes will be made to its technology and product portfolio for the envelope industry, ensuring continued reliable supply and technical support.

With a strong focus on this market, EUKALIN understands the need for greater sustainability. The latest products are almost free from mineral oil and are suitable for both standard and e-commerce envelopes.

Market

Key raw materials like vinyl acetate monomer (VAM) remain tight, and overall availability is currently sufficient. Prices are generally on an upward trend at the beginning of 2025.

Environmental

EUKALIN has developed new adhesives with high bio-based content, reducing the use of mineral oil-based polymers.

These cold glue products are suitable for envelope production and related markets such as e-commerce and bags.

Miscellaneous

Nothing to report

EU ECOLABEL



Assessment of the EU Ecolabel criteria for graphic paper and the EU Ecolabel criteria for tissue paper and tissue products

Commission Decision (EU) 2019/70

Delre, A., Kowalska, M.A.

2025

Summary – EU Ecolabel Assessment (2025)

Why was this assessment conducted?

- As part of the EU Ecolabel Work Programme, the Commission requested a mid-term assessment of the criteria
- Triggered by recent policy shifts, notably the: Ecodesign for Sustainable Products Regulation (ESPR) and Industrial Emissions Directive (IED 2.0)
- Ensures the criteria align with EU sustainability goals, market developments, and future regulatory frameworks.

Summary – EU Ecolabel Assessment (2025)

Key Conclusions

- The criteria are still **valid** and effective and should be **maintained until 31 December 2028**.
- This product group ranks **12th out of 25** in the EU Ecolabel scheme by number of licences and products — showing moderate uptake and continued relevance.
- A future **revision is recommended**, particularly after the update of **BREFs** (Best Available Techniques Reference Documents) for pulp, paper, board, and chemicals

Summary – EU Ecolabel Assessment (2025)

Key Conclusions

- Improvements needed on:
 - Clarity of scope and definitions
 - Recyclability methods, chemical restrictions, and technical annexes
- Stakeholders reported that criteria can be **challenging to meet** and require simplification.
- The JRC will develop a **practical guide** to support public procurement using EU Ecolabel paper-based products.

UPU

FEPE at the UPU Consultative Committee Bern, 19 February 2025

Key Meetings

- FEPE was represented by President **Maja Menard Cedilnik** and Managing Director **Viktor Kovacic** at the UPU General Assembly Consultative Committee.
- Productive exchange with **Marjan Osvald**, UPU Deputy Director General, on promoting **inclusive, sustainable, paper-based communication**, including direct envelope correspondence.



FEPE at the UPU Consultative Committee Bern, 19 February 2025

Core Objectives

- Promote the **Keep Me Posted EU** initiative — advocating for the **right to choose** between digital and physical communications without disadvantage.
- Advocate for **fair access to postal services**, including a transition from **weight-based to volume-based pricing models**, to better reflect today's postal realities and support the envelope and packaging sector.
- Meeting with **Frederick Omamo** (UPU E-commerce & Market Development) addressed the pressure European producers face from dominant Asian e-commerce platforms.

Ongoing Commitment

- FEPE works actively with the UPU to ensure that **consumers' rights**, access to postal services, and the role of **envelope-based communication** remain protected in global postal policy.

FACHPACK 2025

FEPE AT FACHPACK 2025

Hall 3A, Stand 3A-626

- **Location:** Hall 3A, Stand 3A-626
- **Size:** 20 m² (5m x 4m)
- **Type:** Inline stand, 1 open side

● **Call to Members:**

Send us your **promotional materials or samples** to showcase your company at the FEPE stand!

Let's represent the envelope and light packaging sector **together**.



TWO SIDES

Two Sides Trend Tracker 2025

Consumer Perceptions of Print, Paper & Packaging

Survey Overview

- Commissioned by **Two Sides**, conducted by **Toluna** in January 2025
- 4th edition of the biennial study
- 12,400 respondents from Europe (including BE, DE, FR, IT, UK, etc.) and key global markets (US, BR, AU, CA, etc.)

Full results will be presented at the **FEPE Congress 2025** in Sofia this September.



Two Sides Trend Tracker 2025

Purpose & Importance

- Tracks public views on **print, paper, fibre-based packaging, and tissue products**
- 2025 findings reveal **greater consistency** in consumer opinion and **modest improvements** in awareness
- Persistent **misconceptions** remain and must be addressed by the industry

Key Focus Areas

- Environmental perceptions of paper and fibre-based products
- Preferences for printed vs. digital communication
- Views on sustainable packaging alternatives
- Attitudes toward tissue product use and manufacturing

Print and Paper Myths & Facts



Print, Paper and
Paper Packaging
have a great
environmental
story to tell



www.twosides.info

Paper Packaging The Natural Choice



Print, Paper and
Paper Packaging
have a great
environmental
story to tell



www.twosides.info

Available Resources for Members

- **"Myths & Facts"** – debunks common misconceptions about paper, printing, and sustainability
- **"Paper Packaging – The Natural Choice"** – highlights the environmental advantages of fibre-based packaging

Two Sides Myths & Facts Booklets

How to Access

- Available as **PDF downloads** in multiple languages
- **Printed copies** available upon request – widely used in the past by many members
- Great tool for communication with customers, partners, policymakers, and media

Call to Action

- 👉 **Use these materials in your marketing and advocacy work!**
- 👉 Let us know if FEPE should **continue printing** and distributing these booklets – demand has dropped, and your input is important.

KEEP ME POSTED EU

KEEP ME POSTED EU

Progress Report



Why Choice Matters



Stakeholder Mapping: MEPs

Focused outreach on MEPs from relevant **intergroups** and **committees**

- MEP **Elizabeth Grossman** from Austria (Group of the Progressive Alliance of Socialists and Democrats in the European Parliament/ Member of IMCO: Committee on the Internal Market and Consumer Protection) signed the manifesto.
- In conversation with MEP **Marie Dauchy** (France - Patriots for Europe)
- Coordinating with MEP **Heléne FRITZON** (Group of the Progressive Alliance of Socialists and Democrats in the European Parliament - Sweden)
- Coordinating with MEP **MIKA AALTOLA** (EPP - Finland)
- MEP **Nikos Pappas** (The Left group in the European Parliament - GUE/NGL/ Member of PETI Committee - Greek) assured the possibility of adding a petition on our behalf
- Scheduled meeting with MEP **Niels GEUKING** (Group of the European People's Party (Christian Democrats)
- Scheduled meeting with MEP **Virginie JORON** (Patriots for Europe Group)



Opinion Paper/ Brochure Update

- The opinion paper has been drafted and shared with partner NGOs for review and approval
- A brochure has been written and designed, and is currently in the printing phase to support the NGO's messaging and outreach.



Opinion Paper

A Digital Future Must Include Choice: Safeguarding Consumer Rights in the EU's Next Agenda

Drafted by: Keep Me Posted EU

Date: May 2025

Left Behind

The push for digitalisation creates new forms of exclusion, hindering marginalised communities from fully participating in the economy and society.

44% of EU adults lack basic digital skills

12% of the population in low-income and digitally underserved areas lack home internet access

Communities in the EU population affected by digital exclusion:

- People with disabilities
- Immigrants and refugees
- People wary of learning digital shortcuts
- The socioeconomically disadvantaged

The EU's digital drive also fails to consider citizens' genuine privacy concerns or their personal preference for **physical mail** and **print-based communication**.

Keep Me Posted EU

The push for digitalisation creates new forms of exclusion, hindering marginalised communities from fully participating in the economy and society.

That's why **Keep Me Posted EU** advocates for taking a balanced approach, one that promotes both digital and physical communications without one replacing the other.

- Preserving and strengthening non-digital communication channels, including postal services
- Launching awareness campaigns about non-digital alternatives
- Creating hybrid communication models that integrate digital and physical options
- Raising awareness about the value of print communication
- Guaranteeing the right to choose between digital and physical communication
- Ensuring that businesses, public institutions and policymakers accommodate all communication preferences

The Bottom Line

By offering choice and flexibility in how we receive information and communicate, society can move towards a more equitable and inclusive future where no one is left behind.

Digital Shortcomings

- Mind the Gap**
Significant disparities in digital access, skills and engagement have created a 'digital divide'.
- Digital Footprints**
According to a survey, 56% of the European population is concerned about online security and the risk of personal information being hacked.
- Regional Disparities**
Unequal internet access and infrastructure across EU regions result in varying levels of digital readiness and adoption, as 57.6% of rural households are connected to the internet, compared to 77.9% in urban areas.
- It Takes Skills**
Basic digital skills - essential for participating in a digital society - remain elusive for 54% of EU adults.
- The People's Choice**
75% of Europeans believe they should be able to choose how they receive communications.

Social Media Updates:

Consistently sharing testimonials, excerpts from the Why Choice Matters report, and awareness posts across LinkedIn.

LinkedIn Analytics:

Highlights

Data for 2/27/2025 - 5/27/2025

3,499

Impressions

▼ 55.6%

178

Reactions

▼ 36.7%

INCLUSIVITY DOES NOT LOCK PEOPLE OUT OF CHOICE

DIGITALISATION WITHOUT INCLUSION IS EXCLUSION

"I use emails daily, but for important messages and bills, I trust paper for security."

Erika V. Slovenia

Equal access starts with the freedom to choose how we communicate.

Key Questions Shared With MEP Sebastian Everding

The following questions will be displayed by MEP Sebastian Everding on his website and then will be sent to the commission:

1. What is the Commission's rationale for reducing or removing paper-based communication options in the 2025 Work Programme, and how will it avoid contributing to the stigmatisation of non-digital formats or the risk of digital exclusion?
2. Has the Commission conducted or commissioned assessments on the impact of these changes on accessibility and inclusion/exclusion, particularly for digitally marginalised communities?
3. Does the Commission intend to establish balanced communication policies that allow citizens and stakeholders to choose between digital and paper-based formats without disadvantage?

Event Update:

- Event scheduled from 14:00 to 16:00 on 26th November with coffee and sandwiches.
- The event venue in Strasbourg has been reserved.



Support the KMPEU Campaign:

Help us advance the *Keep Me Posted EU* agenda by supporting our ongoing advocacy for citizen choice and access to essential information.

- **Sign the Manifesto**

Add your voice to the campaign by signing the manifesto:

<https://keepmepostedeu.org/manifesto/>

- **Follow Our LinkedIn Page**

Stay updated and amplify our message by following and sharing:

<https://www.linkedin.com/company/105524465/admin/dashboard/>

Let's ensure all citizens have *Right to Choose* how they receive essential information

SIGN TODAY

First Name *

Jane

Enter your first name here

Last Name *

Smith

Enter your last name here

Email Address *

your@email.com

Role *

Role

Company *

Company

Support the Manifesto



COMMUNICATION STRATEGY

ENHANCING FEPE'S COMMUNICATION STRATEGY

Strengthening LinkedIn Presence:

- Evolving our approach to make our LinkedIn content more engaging and interactive.

Video Interviews:

- **Leadership Insights:** Regular video interviews with our President, discussing FEPE's mission and current initiatives.
- **Member Spotlights:** Featuring individual members to showcase their contributions and increase their visibility within the community.
- **Member-Generated Content:**
- Encourage members to submit news, updates, and insights for inclusion in our newsletter and LinkedIn posts, fostering a dynamic mix of internal and industry-wide news.

Thematic Focus Series:

- Every quarter, focus on a key topic, such as sustainability, inviting members to share their initiatives and success stories.

Visual Content Enhancement:

- Request more images directly from members to overcome the challenge of sourcing copyright-free visuals.

FEPE Congress Engagement:

- Introduce pre-event speaker interviews and invite community input on questions and topic suggestions to boost engagement and anticipation for the Congress.

Educational Series – 'Did You Know?':

- Seeking your guidance on the target audience—whether to focus on industry professionals or also educate a broader audience unfamiliar with our industry.

FEPE CONGRESS SOFIA 2025



FEPE

68th FEPE
CONGRESS



SOFIA, BULGARIA

10 - 12 september 2025



St. Alexander Nevsky Chatedral



FEPE

HOTEL INFORMATION – SOFIA BALKAN PALACE

- 5-star historic hotel in the heart of Sofia
- Congress participants benefit from special group rates:
 - €135/night – Single room
 - €145/night – Double room
- Elegant design, excellent conference facilities, and top service
- Central location – perfect for exploring Sofia.



VENUES OVERVIEW – WHERE EVENTS HAPPEN

Congress Venue & Welcome Dinner

All Congress sessions take place at the **Sofia Balkan Palace**

Wednesday, 10 September

- Welcome Dinner at the hotel
- Casual networking atmosphere
- Dress code: Smart casual

VENUES OVERVIEW – WHERE EVENTS HAPPEN

Gala Dinner – National Museum of History

- **Thursday, 11 September**
 - Exclusive venue: National Museum of History
 - Private museum visit before dinner
 - Elegant black-tie dinner
 - Shuttles arranged from hotel



VENUES OVERVIEW – WHERE EVENTS HAPPEN

- Farewell Dinner – Bulgarian Cultural Evening
- Friday, 12 September
 - Venue: Event Space 2020
 - Traditional Bulgarian cuisine and folklore
 - Scenic city sightseeing before dinner
 - Casual & festive end to the Congress



CONFIRMED SPEAKERS AND TOPICS

- **Andrea Boltho** (Oxford Economics)
Economic Outlook for Europe – Implications for the Envelope and Packaging Industry
- **Marie Clarke** (EMA)
U.S. Industry Update – Challenges and Opportunities Across the Atlantic
- **Andre Wienströer**
Chair of the Marketing Committee, FEPE Vice President
Market Overview and Statistics – Insights from the European Envelope Sector
- **Jonathan Tame** (Two Sides CEO)
Trend Tracker 2025 – Key Consumer and Industry Insights

CONFIRMED SPEAKERS AND TOPICS

- **Botond Szebeny** (PostEurop Secretary General)
The Evolution of Direct Marketing in the Postal Sector
- **La Poste (France) & DK***
Developing a CO2 Emission Calculator for Envelope and Packaging Production
- **Speaker***
Presentation of the European Packaging Market Study and Future Outlook
- **Keep Me Posted EU***
Campaigning for Consumer Choice

REGISTRATION & PRACTICAL INFO

- Registration via online form
- Ensure name & VAT info is correct (for badges/invoicing)
- Accompanying persons can also be registered
- Sofia International Airport (SOF) – 20 min from the hotel

A.O.B.

**THANK YOU
FOR YOUR
ATTENTION!**

