
Cepi
RENEWABLE
RECYCLED
RESPONSIBLE
EUROPEAN

EMPHA
13 June 2025

Cepi

Europe’s pulp & paper industry and the EU forest-based bioeconomy

Ana Díaz Cordero
EU Public Affairs Manager

About Cepi

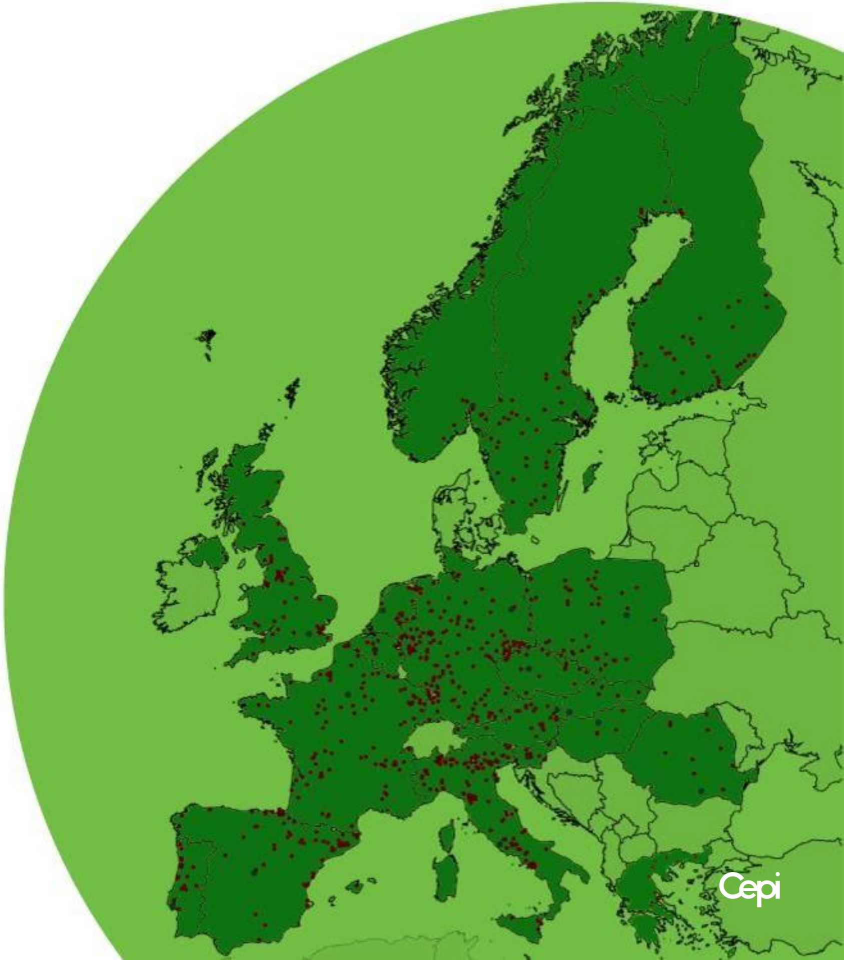
Represents in Brussels
500 pulp, paper and board producing companies
895 mills across Europe of which 139 biorefineries
180 000 people employed directly
19 member countries

Engaged in international fora (UN, FAO, WTO) to defend our **21.7 %** share of global production

Working across the value chains – from forest owners to converters

Chair: **Marco Eikelenboom, CEO Sappi**

A staff of **24** industry, policy and public affairs experts



About Cepi

We deploy our agenda in 6 focus areas
Outline of Cepi activity areas 2020-2029

- ETS, energy policy, renewables, 2050 climate strategy
- Food contact, sustainability performance, REACH
- Land use and forestry, certification, forest-based industries joint strategy
- Production and statistics reports, Industrial policy, international trade, transport
- Circular economy, recyclability
- Bioeconomy strategy, R&D programmes, funding, skills agenda

Energy & climate change

Environment health & safety

Forestry

Trade & industrial affairs

Recycling

Bioeconomy & social affairs

About Cepi

We are renewable, and sourced, made and recycled in Europe, a responsible industry towards the environment, its customers and workers

Transforming pulp wood into cellulose and bio-based products, 86% of our raw materials are sourced from within the European Union and 78% of the wood comes from certified forests

Keeping the fibres in the loop, 74% recycling rate of EU paper-based products

Producing
Pulp & fibres
Nano-cellulose
Bio-energy
Bio-chemicals
Print & graphic paper
Packaging solutions
Hygiene and tissues
Specialty papers

A new EU political mandate for the industry?

The 2025 Commission's initiatives so far…

Competitiveness Compass for the EU

It will guide the work in the coming five years to reignite economic dynamism in Europe.

Clean Industrial Deal

The central component of the Competitiveness Compass. It is the EU's growth and prosperity strategy bringing together climate and competitiveness.

Action Plan for Affordable Energy

Supporting the Clean Industrial Deal, it will focus on decreasing energy costs for citizens, businesses, industry and communities across the EU.

 European Commission (2025) Action Plan for Affordable Energy, p. 2.

A Clean Industrial Deal (CID) supporting the needs of energy-intensive industries

New narrative for the energy-intensive industries.

*“The measures it proposes are the result of the active engagement of industry leaders, social partners and civil society through **the Antwerp Declaration for a European Industrial Deal and the Clean Transition Dialogues**. Our proposals are directly tailored to their needs.”*

Recognition of the **bioeconomy, circularity and bio-based products.**

*“The new **bioeconomy sectoral plan** will lay down priorities for manufacturing and using biomaterials, and for retaining them as long as possible in the economy.”*

Six pillars of the Clean Industrial Deal

Access to affordable energy → Action Plan for Affrodable Energy

Lead markets: boosting clean supply and demand

Public and private **investments**

Powering **the circular economy**: a secure access to materials and resources → upcoming Circular Economy Act

Global markets and international partnerships

Skills and quality jobs for social fairness and a just transition

Bioeconomy Strategy: a new sectoral transition pathway under the CID

Industrial Action Plan for an Automotive Sector

Steel and metals action plan

Chemicals Industry Package

Sustainable Transport Investment Plan

Bioeconomy Strategy

(to be published by Q4 2025)

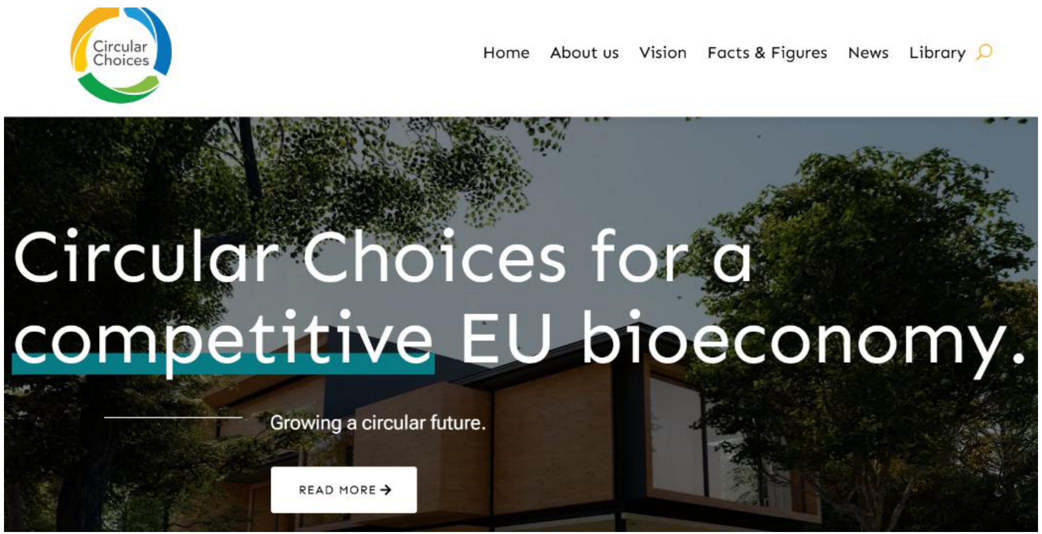
What is the unique value that Cepi brings to the table?

- WE are made in Europe.
- WE create jobs and employment in regional and remote areas.
- WE are able to substitute fossil-based products.
- WE stand for sustainable forest management.
- WE are champions in recycling.
- WE stand for innovation and valorizing everything from our raw materials.

Key policy asks

1) Initiate a Strategic Dialogue on the Bioeconomy
2) Promote the uptake of bio-based products by recognising their substitution potential.
3) Recognise renewability in product policy legislation.
4) Remove barriers to industrial symbioses.
5) Carry out an evaluation of the existing EU-level sustainability framework relevant to forest management before imposing a new layer of legislation.
6) Robustly implement the cascading use principle as defined in RED III in close cooperation with the Member States.

Cepi leading the Circular Choices coalition – broadest ever at EU level representing the forest-based bioeconomy sector



After 3 years of work, the Circular Choices campaign has ***enable the bioeconomy to return to the EU agenda***

Commissioner for Environment Jessika Roswall *will open our next Circular Choices event on 17 September*

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13 June 2025

EU Regulation on Packaging and Packaging Waste

Maria Georgiadou,
Cepi Recycling Manager

Legislative timeline

2022

2024

2025

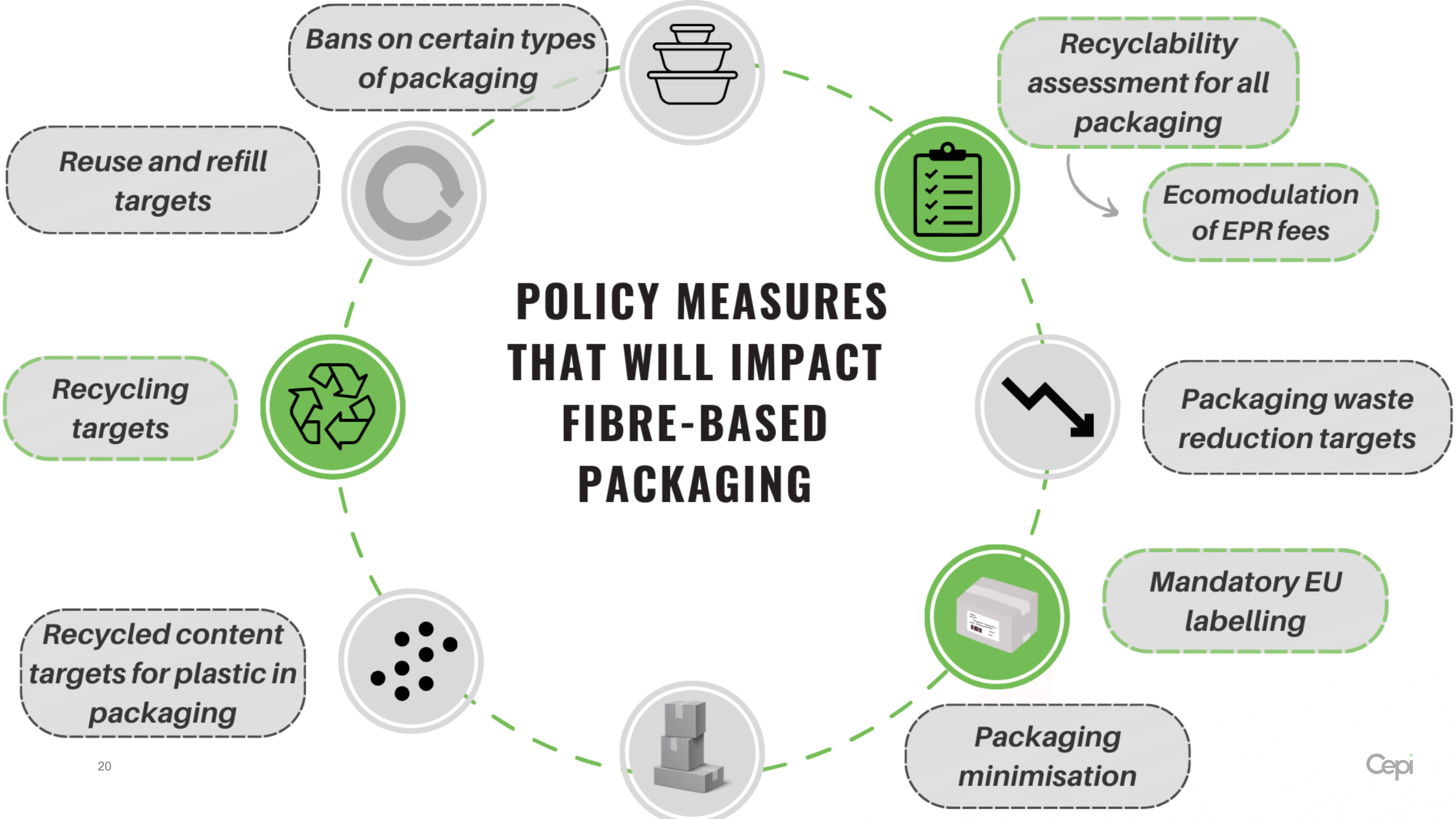
2026

30 November 2022
Publication of the European Commission Legislative Proposal

December 2024
Adopted by Council and European Parliament

22 January 2025
Publication in the Official Journal of the EU – Entry into force 20th day following publication

12 August 2026
Application of Regulation


POLICY MEASURES THAT WILL IMPACT FIBRE-BASED PACKAGING
Bans on certain types of packaging
Recyclability assessment for all packaging
Ecomodulation of EPR fees
Packaging waste reduction targets
Mandatory EU labelling
Packaging minimisation
Recycled content targets for plastic in packaging
Recycling targets
Reuse and refill targets

REDUCE

Bans on certain types of single-use plastic packaging

Packaging waste reduction targets

Minimisation targets

Single use plastic packaging for foods and beverages filled and consumed within the premises in the HORECA sector

Single use plastic grouped packaging used at the point of sale to group goods

Bans on single-use plastic packaging by 2030

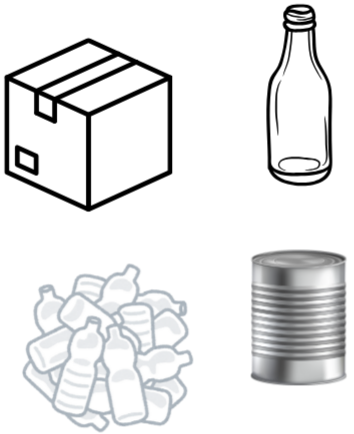
Very lighweight plastic carrier bags

Single use plastic packaging for unprocessed fresh fruit and vegetables that weigh less than 1.5 kg

Single use plastic packaging containing individual portions or servings in HORECA sector

**Scope of bans & examples of the packaging formats to be provided by Q4 2026 (tbc) from Commission.*

Packaging waste reduction targets



2030

5%

2035

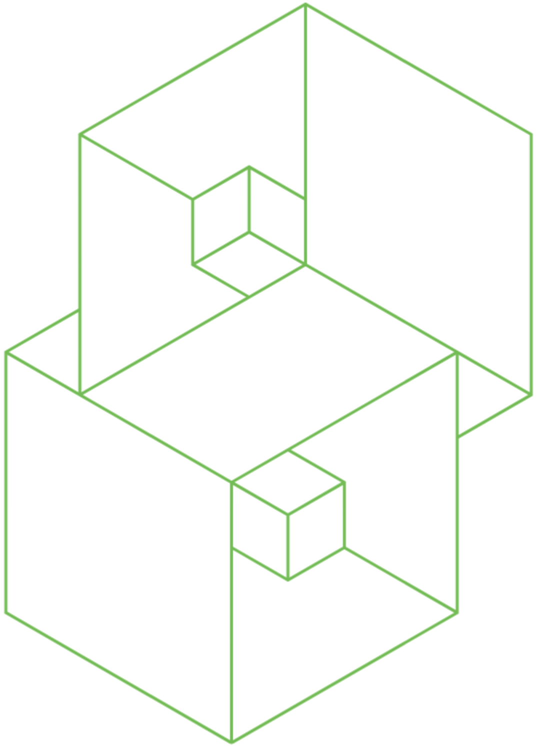
10%

2040

15%

Waste reduction targets are cross-material (one target for all packaging waste) and are imposed on Member States.
The base year is 2018.

Packaging minimisation



By 2030, the economic operator who fills packaging in:

- grouped packaging,
- transport packaging
- e-commerce packaging

shall ensure that the empty space ratio is maximum 50 %.

REUSE & REFILL

Reuse targets and refill obligation

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Reuse/refill targets

	Packaging type/use	Reuse/refill targets (minimum targets)	Exemptions (non-exhaustive)
	**Transport packaging** or sales packaging used for transporting products, including via e-commerce **(B2C & B2B).**	**40% by 2030** 70% by 2040 (aspirational)	Cardboard boxes
	**Transport packaging** or sales packaging used for transporting products used **intra-business** and **B2B in same Member State.**	**100% by 2030**	Cardboard boxes IA to exempt pallet wrappings and straps (tbc).
	Grouped packaging in the form of boxes used outside of sales packaging to group a certain number of products to create a stock-keeping or distribution unit	**10% by 2030** 25% by 2040 (aspirational)	Cardboard boxes

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RECYCLE

Recycling targets

All packaging shall be recyclable via recyclability assessment

Recycled content targets for plastic in packaging

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Recycling targets for Member States

By 31 December 2025

65% by weight of all packaging waste generated.

Material specific:
50% plastic
25 % of wood
70 % of ferrous metals;
50% aluminium
70% glass
75% paper/cardboard

By 31 December 2030

70% by weight of all packaging waste generated.

Material specific:
55% plastic
30 % of wood
80 % of ferrous metals;
60% aluminium
75% glass
85% paper/cardboard

Recyclability requirements for all packaging

By 2030

Compy with Desing for Recycling criteria.

Only performance grades A,B,C allowed on the market.

By 2035

To be recycled at scale.

55% recycling rate for all packaging types, 30% for wood packaging.

By 2038

Only performance grades A & B allowed on the market.

Recyclability assessment for all packaging

Each packaging unit assessed based on design for recycling criteria developed for each packaging category:

1.Paper/cardboard packaging

2.Composite packaging of which the majority is paper/cardboard

The assessment will provide a recyclability score -->

Recyclability score	Recyclability grade	
	By 2030	By 2038
Higher or equal to 95%	A	A
Higher or equal to 80%	B	B
Higher or equal to 70%	C	Market ban
Lower than 70%	Market ban	Market ban

Substances of concern in packaging

18 months from entry into force (Q3 2026 tbc)

Restriction on **food contact packaging containing** per- and polyfluorinated alkyl substances - **PFASs** above certain thresholds.

By December 2026

Commission and ECHA to prepare a **report on the presence of substances of concern in packaging** to determine the extent to which they negatively affect the re-use and recycling of materials or impact chemical safety.

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RECYCLE

Harmonised labelling to help consumers sort packaging

Mandatory labelling containing information on recycled plastic content

Ecomodulation of Extended Producer Responsibility fees according to recyclability assessment and recycled plastics content

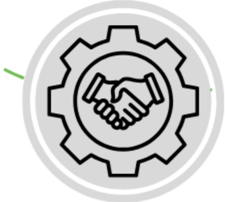
The revised PPWR will not deliver the anticipated and necessary harmonisation of EU rules.

High risk of diverging national rules on packaging - Member States retained the freedom to introduce additional measures on certain policy areas.

IMPLEMENTATION CHALLENGES

Legal uncertainty on the scope and timeline of certain policy measures.

EU industry and markets need regulatory predictability to thrive.



Setting recyclability requirements for market placement of packaging require technical expertise and appropriate tools .
Cooperation between the Commission, the industry and European standardisation bodies is required.

WAY FORWARD

The Commission needs to set the necessary safeguards to ensure a well-functioning single market.

Legal clarity and predictability needs to be provided to ensure both timely compliance with EU rules and a resilient EU industry.

The Commission needs to establish a formal pathway of cooperation with the industry and CEN - European Committee for standardisation.

The paper and board industries have valuable technical expertise and tools.

Fibre Packaging Europe

Fibre Packaging Europe

Informal coalition of 7 associations:
FBCA - The Food and Beverage Carton Alliance
Cepi
CEPI Eurokraft
ECMA – European Carton Makers Associations
EPPA - The European Paper Packaging Alliance
FEFCO - The European Federation of Corrugated Board Manufacturers
PRO CARTON - The European Association of Carton and Cartonboard manufacturers

FPE members employ 365k people across 2.2k facilities in Europe, generating around €120bn in annual turnover.

Fibre Packaging Europe

One joint mission - to provide renewable, circular and sustainable fibre-based packaging solutions to European citizens to achieve the European Green Deal objectives.

Added value:

- A united and aligned value chain for fibre based packaging that speaks with one voice to policy makers
- By taking joint action we maximise our impact
- Go-to coalition for policy makers and industry stakeholders
- Network of technical and policy experts – exchange of intelligence and technical expertise
- Agile and coordinated action

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