

Produced by the European Federation of Corrugated Board Manufacturers

Preparing corrugated for a sustainable future

Contents

Editorial

FEFCO is your voice in Brussels
page 2

FEFCO Congress Prague
pages 2-3

Launch of the new FEFCO ESBO code
page 4



Industry action on DIBP
page 5

Corrugated is a supply chain winner reveals ITENE
page 6

French stars of the corrugated industry
page 7



FEFCO news and Activities

Industry News

Calendar of Events
page 8



ANGELIKA CHRIST
SECRETARY GENERAL, FEFCO
angelika.christ@fefco.org

Editorial

Dear Readers,

My first seven months with FEFCO seem to have gone by in a flash, busy with the major issues concerning our industry: bioenergy, the waste framework directive and carbon footprint, to name just a few of the items being discussed here in Brussels. And even if Brussels might be far away from where you live, the effects of European legislation and developments will be visible in all countries of the EU – with a certain time lag.

Our industry is convinced that corrugated is the right choice for any transport packaging; especially in the fruit and vegetable markets. A substantial effort has been made in order to start a European campaign promoting our product especially to retailers. We see many advantages retailing has when using corrugated. What we need is a joint effort of all forces in the corrugated industry to promote those advantages to retailers and to the whole supply chain. Communication is the key word; we are determined to get properly started with a FEFCO campaign.

We are finalising the programme for the next FEFCO Congress in Prague, where we will concentrate on the issue of sustainability and its practical meaning for our industry. Again: one of the many advantages our material offers – the perfect recycling-loop is hard to copy by others! But sustainability is more than about the environment – so let's discuss in Prague whether corrugated really meets expectations from a political angle as well as from the customers' point of view. And I hope that all participants will report results similar to our marketing congress in Athens: great program, great organization and a great venue. The "mother of cities", as Prague is called, is waiting for you. One last question before you start reading our articles: have you taken a look yet on the website at the new electronic version of the FEFCO ESBO Code? It certainly is well worth checking out – you can read about it on page 4.

Best Regards



PREPARING CORRUGATED FOR A SUSTAINABLE FUTURE

Sustainability is the timely theme for our landmark 30th FEFCO Congress in the Czech capital of Prague from 18-20 June. The concept of sustainable practices and their influence on everyday business realities must be understood. This is the purpose of the event, which makes it especially relevant to the future plans of every association member and the corrugated board industry as a whole.

Focusing on the theme "Preparing for a sustainable future", will give key industry executives opportunity to join experts and peers in examining what goes into building new, sustainable business models. What does it all mean for the future paths of manufacturing, consumption and supply chains?

It was 20 years ago that the term "sustainable development" acquired its current definition and began to exercise the minds of European policy makers and technology front-runners. This Congress will be an attempt to untangle the complex web of sustainability issues and understand exactly what a "sustainable fu-

What's in it for me?

Calls to improve socio-economic and ecological impacts of manufacturing processes and material consumption are creating a new commercial environment in Europe to which all industry sectors must learn to adapt to be competitive with the rest of the world. Come and hear about potential advantages for corrugated.



© Intercontinental Hotel

ture" means for the corrugated board industry. Delegates will be richly rewarded for attending this timely Congress on a crucial theme says FEFCO secretary general Angelika Christ. Important questions will be answered, curiosity satisfied and the industry's knowledge bank brought up to date – to help the corrugated sector meet the demands of a new business climate.

FEFCO is looking forward to broad and deep coverage of sustainability issues. As an added bonus a special session will unveil findings of recent tailor-made surveys to provide helpful leads for future company plans.



30th FEFCO Congress
18-20 June 2008

For certain, provocative arguments, searching questions and enlightening debates, will add to the excitement of a Congress not to be missed.

A new business climate is evolving in line with an overriding aim for Europe to show leadership in sustainable technologies, to hit high targets which safeguard the environment and to compete strongly in economic terms on the world stage.

Change is wanted and needed. Is the corrugated board industry prepared to accept the challenge?

“Sustainable development seeks to meet the needs and aspirations of the present without compromising the ability to meet those of the future”: the definitive explanation of “sustainable development” since its first appearance in a United Nation’s commission report of 1986

The 30th FEFCO Congress will take discussions on sustainability out of the boardroom and onto a bigger stage for a closer examination.

Expert speakers will identify the potential positive commercial advantages of sustainability awareness.

Delegates, by sharing insights and comparing experiences with their peers from across Europe, will gain a deeper personal understanding of a highly complex subject.

Congress programme in brief

- ▶ Opening by FEFCO president Dermot Smurfit
- ▶ Czech packaging and corrugated board market report
- ▶ European sustainability policy development overview
- ▶ Sustainable principles in action in the corrugated market by top politicians
- ▶ Retailer perspectives
- ▶ Corrugated industry case studies
- ▶ The leadership role of national associations and examples of latest sustainability-focused initiatives

Call for sponsors

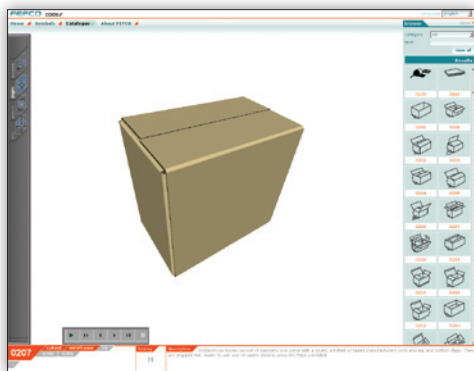
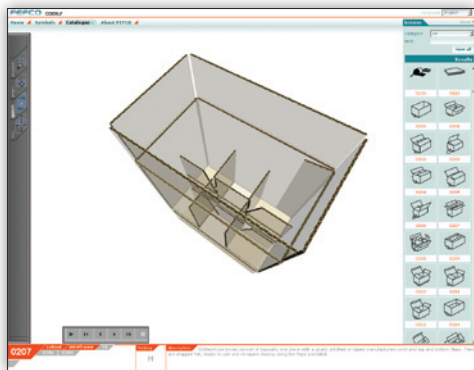
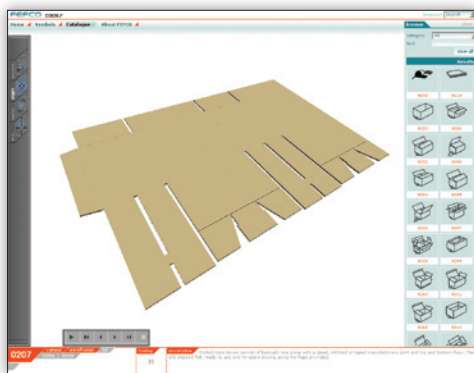
The FEFCO Congress is an excellent occasion to network with decision-makers from within the corrugated industry. Sympathiser members are being invited to sponsor activities in a busy social programme. This year, for example, it is possible to sponsor part of a full evening event in the city of Prague. To raise their company profiles during Congress, sympathiser members can also display names and logos in the printed programme, on the website and around the conference venue.

Nathalie Schneegans: nschneegans@fefco.org
Tel: +32 26 50 08 32



© Intercontinental Hotel

Impress customers with the new FEFCO ESBO Code



Screen grabs of the latest FEFCO ESBO Code providing a dynamic tool for the corrugated industry

The FEFCO ESBO Code in the new electronic CD-Rom version is a direct and dynamic way to demonstrate the potential for corrugated and solid board packaging to be adaptable, creative and versatile.



Designed for 21st century demands for global supply chain efficiency and brand stand-out, the latest Code can be consulted in 13 languages for ease of use for companies in Europe and around the world. The electronic Code brings to life a total of 199 designs. Designers, sales people and customers, all will reap benefit from its dynamic 3D capability. They can see folding sequences of the FEFCO ESBO designs and even take a "virtual tour" inside the box to examine its structure. The value of innovative interactive design visualisation in the creative and sales process is enormous. The CD-Rom, is a highly useful single source of a wealth of valuable information about environmental issues, regulatory affairs, tracea-

bility, REACH guidance and good manufacturing practices. With the addition of FEFCO testing methods, FEFCO practical recommendations, FEFCO guidelines and FEFCO classification systems, this really is the "complete toolbox" for today's box-making industry.

You can see the free test version of the Code online. You will be asked for your login and password to access the member only section of the FEFCO site. If you do not have a login and password, follow the instructions given on the site and FEFCO will provide you with a membership code only valid for the FEFCO ESBO Code site.

You can order the FEFCO ESBO Code online. Go to www.fefco-esbo-codes.com and follow directions.

The unit price is:

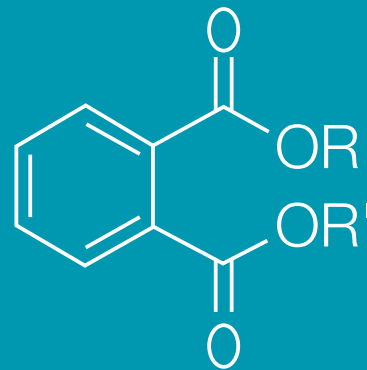
- ▶ €200 for FEFCO members
- ▶ €400 for non-members

To order a large quantity of Codes contact the FEFCO Secretariat on +32 26 46 40 70 for a personalised quote.

The Code past and present

- ▶ the International Fibreboard Case Code has been the accepted global standard and reference point for box makers for 40 years
- ▶ the Code is recognised by ISO/CEN and ICCA, the International Corrugated Case Association
- ▶ the standard designs were first published by the European Federation of Corrugated Board Manufacturers and European Solid Board Organisation in 1963
- ▶ 2008 brings the Code updated for today's global corrugated industry

Important call to exclude DIBP from adhesives



For food safety reasons, the corrugated industry is calling for adhesives suppliers to find a suitable alternative to phthalates.

The German food safety agency - the BfR (Bundesinstitut für Risikobewertung) - has recently taken an interest in diisobutyl phthalate (DIBP). This opens a new and important issue for our industry with consequences for all FEFCO members.

It is not just a German problem because the BfR limits are widely used throughout the European food contact sector as *de facto* standards. This means that food producers operating Europe-wide will be asking for paper packaging to fulfill the BfR standards.

FEFCO understands that the European Commission is also concerned about phthalates, which will lead to increasing pressure to end the use of these substances in Europe.

To achieve the strict BfR limit, it is essential to eliminate all European sources of phthalates in the recovered paper stream. So it is important that not only manufacturers of food contact applications take action, but non-food contact applications should also change to adhesives that are free of phthalates.

FEFCO has therefore urged its members to start discussions with adhesives suppliers to phase out the use of these phthalates and keep FEFCO updated on the actions taken.



The DIBP issue particularly concerns adhesives used at the folder gluer machine stage

What is DIBP?

DIBP is a component of adhesives - predominantly in PVA and hot melt adhesives - used during the manufacture of laminated and corrugated board. Its presence is increasing because it is used as a substitute for a similar substance, di-n-butyl phthalate (DNBP), which has been the subject of a number of health concerns.

What's the problem?

According to the EU Plastics Directive the specific migration limit (SML) for DNBP is 0.3mg/kg food (0.05mg/dm² paper).

The German food safety agency (BfR) takes the view that the limit for DIBP should be

based on the new DNBP limit. Both substances are found in recycled packaging papers and the levels of DIBP now exceed, by a wide margin, the new limit for DNBP.

The existing limit for DIBP is a tolerable daily intake of 0.05mg/kg, that is, 3mg/kg food (0.5mg/dm² paper). But the BfR says that this "old" limit is not based on scientific evidence and wants to use the DNBP limit as the basis for DIBP.

The proposed new limit is 1mg per kg of food (0.167mg/dm² paper), with a more stringent limit for baby food of 0.5mg per kg food (0.083mg/dm² paper).

Contact: Hanneke de Leeuw
Email: hanneke.deleeuw@fefco.org
GSM: +32 478 61 94 55
Tel: +32 2 626 98 36
Fax: +32 2 646 64

Corrugated celebrates Spanish test results

Comparison tests with competing materials have shown that corrugated board performs better overall as a secondary packaging material for products in the food distribution chain - in environmental terms and handling.

Spain's Technological Institute of Packaging, Transport and Logistics (ITENE) and the ID&EA Group of the Polytechnic University of Valencia, evaluated the technical characteristics and material recovery and recycling processes of corrugated board and shrink-wrap plastics, which are used for products such as mineral water and milk packs.

End-of-life analysis of those packaging materials and the waste they generate, suggests corrugated board has a less negative impact on the environment

End-of-life analysis of those packaging materials and the waste they generate, suggests corrugated board has a less negative impact on the environment. It compared two types of shrink-wrap of different thicknesses and B-flute and micro-flute packaging board. Results from a separate scientific study into ecological efficiency of packaging used for long-distance transport of horticultural and fruit products were also taken into account. Among the latest study's main findings, post-consumer paper and board has a high economic value as a secondary raw material for

making new paper-based products compared to shrink-wrap, which is burned for energy production. Secondly, corrugated packaging biodegrades completely in much shorter time periods.

Thirdly, with difficulties in sorting and separating plastic films and subsequent recovery, due to the diverse types of plastic in use, the combined recovery and recycling rate of paper and board collected from industry and households is far higher than that of shrink-wrap.

Tests for comparative functionality indicated that integrated handles of a corrugated pack prevent breakage and tearing, to make it easier for the final consumer to carry.

Also observed was that shrink-wrap film has

the greater slip resistance for load stability, but separators can be needed to better distribute weight and avoid damage during storage and transport. Corrugated formats, on the other hand, give a more compact total load, which can achieve the same level of stability as shrink-wrapped products.

Contact: ITENE
Tel: +34 963 90 54 00
Antonio Monsalve
Email: amonsalve@itene.com
Ana María Navarro
Email: anavarro@itene.com
www.itene.com
www.dpi.upv.es/ID&EA



Sustainability benefits for corrugated are apparent throughout the distribution chain and the recycling "loop"

National Associations Update

French corrugated stars show bright industry future



The Corrugated Stars of ONDEF is a contest that highlights some of the best designs the French corrugated industry has offered over the year. Yet again, Logo étoiles de l'Ondulé displayed the industry's capacity to respond to increasingly complex customer requests says ONDEF, the French manufacturers' association.

This was the fifth year that ONDEF has run the event with Federation Française du Cartonnage, which represents French corrugated converters. The contestants delivered a wealth of high-class performances despite difficult economic conditions in the corrugated industry, notably the increase in raw material prices.

«This showcase is an idea that could export successfully» Angelika Christ

The number of entries has kept on growing over the years and 2007 saw an increase of 22% compared to 2006.

In total, "Corrugated Stars" went to 28 projects chosen from 79 entries, including a new category prize for a top supplier - won by Cargill for its contribution to the industry.

In addition, five packaging schools entered 21 projects and of such a high level that "a bright future surely can be expected for the industry", says ONDEF.

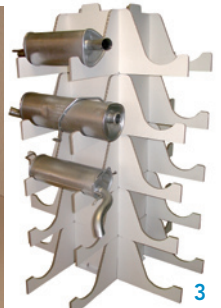
ONDEF
Secretary General : Olivier de Lagausie
Tel: +33 1 42 68 01 94
ondef@online.fr

Congratulations to all Gold Star winners! Here they are, with the categories in which the successful companies excelled:

1. **Design and differentiation by print and layout** - Black and gold packaging for Nicolas Feuillatte Palmes d'Or Champagne by Smurfit Kappa France
2. **Technology, innovation and environment** - Durable packaging for auto parts by Cartonnages Pfaher
3. **Design and differentiation by shape and volume** - Totem for exhaust pipes by Mulliez Richebe Sas Cartonnerie de la Marque
4. **Packaging and sales display** - Box Sicilia by Ondulys

5. **Packaging optimisation and process improvement** - Corrugated mono material for the export of scooter bikes by DS Smith Kaysersberg
6. **Supply chain and packaging** - Shelf ready packaging for Coshida Continentale Nutrition cat food by Otor Paris
7. **Creative project - non packaging**: Bottle-shaped lamp by International Paper
8. **Supplier innovation**: C*Starch Booster, improved performances for glue by Cargill

We also congratulate Silver and Bronze Star winners too numerous to mention here.



FEFCO News

► The impact of EU biofuels policy on starch supply to the corrugated industry

The aim is to organise an informative workshop highlighting and discussing the implications of the expected legislation on biofuels for the corrugated industry, including examples from other industry sectors.

Members of FEFCO will be welcome to attend the event in April. The programme will be found on FEFCO website.

For further information contact: hanneke.deleeuw@fefco.org

► General assembly and board meeting 4 December 2007, Brussels

Members agreed that in 2008 FEFCO would launch a communications campaign to focus on the many positive benefits of corrugated packaging. For greatest impact, FEFCO will be working closely with the national associations to coordinate this campaign at European level.

► New chairman for FEFCO Communications Committee



Imre Hopka (pictured), of Dunapack, Hungary, resigned his position as chairman of FEFCO Communications committee in December, for personal reasons.

We take this opportunity of thanking Mr Hopka most warmly for the time and effort he put into the committee chairman role, and his



exceptional 15 years' contribution to this hard-working committee. The new chairman is **Mr. Alexander Enzenberg**, of Mosburger, Austria (pictured).

► New secretary general for CITPA



In December **Hanneke de Leeuw**, FEFCO regulatory affairs manager, was appointed secretary general of CITPA, the confederation of Paper and Board converters in Europe. Hanneke joined FEFCO two years ago, previously responsible for running the Brussels-based representation of European private port operators.

www.citpa-europe.org

email: info@citpa-europe.org

Strategic Alliance

► New president for ICCA



Jim Keller is the new president of the International Corrugated Case Association in America, replacing Heather Marshall. Mr. Keller, a former

leader of the second largest corrugated manufacturing company in the world, has held past leadership positions within ICCA, the Fibre Box Association (FBA), the World Containerboard Organization (WCO), and the American Forest & Paper Association (AF&PA).

His priorities include to monitor the important issues around the globe, expand membership, create quality agendas for the biennial ICCA/WCO corrugated/containerboard summit, strengthen relationships among the world's association members and improve communications.

National associations updates



Long, hot summer boosted Greek volumes

The Hellenic Association of Corrugated Board & Packaging Manufacturers reports demand and production volumes in Greece developed well during 2007. For the time being and in common with some other countries, it is experiencing difficulty in collecting the exact figures from members, it says. However, detailed information is expected later in the year, when company results are published showing members' turnover.

The common belief among FEFCO's Greek members is the very long and very warm summer, and "outstanding" 2007 tourist season, contributed to strong demand for water and beverages in general, ice creams and dairy products, which supported volumes particularly during the summer months.

The Hellenic Association's January meeting focused on recycling fees and the setting up of a working group to prepare a technical and commercial regulation to be included in members' contracts with clients.

Calendar of Events

FEFCO Events

► FEFCO Workshop

April 2008

FEFCO offices, Brussels

The impact of EU biofuels policy on starch supply to the corrugated industry

Programme coming soon on FEFCO website

Contact: hanneke.deleeuw@fefco.org



► FEFCO Congress

18-20 June 2008

Intercontinental Hotel

Prague, Czech Republic

www.fefco.org

Industry Events



► Interpack

24-30 April 2008

Düsseldorf Trade Fair Center

Düsseldorf, Germany

www.interpack.com

► Sino Pack

4-7 March 2008

Guangzhou International Convention

& Exhibition Centre

Guangzhou, China

► Sino-Corrugated

7-10 April 2009

Shanghai New International Expo Centre

Shanghai, China

www.sino-corrugated.com

Other Events

► Pack LOG

11-14 March 2008

Paris Nord, Villepinte, France

► Retail Week Conference 2008

12-13 March 2008

London Hilton Metropole, UK

► COSMOPACK

10-14 April 2008

Bologna Fiere, Bologna, Italy

FEFCO
European Federation of
Corrugated Board Manufacturers

Avenue Louise 250 B - 1050 Brussels
Tel: +32 2 646 4070 Fax: +32 2 646 6460
Email: info@fefco.org

www.fefco.org