

19 November 2025



EU Regulation on Packaging and Packaging Waste

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Cepi Recycling Manager**

POLICY MEASURES THAT WILL IMPACT FIBRE-BASED PACKAGING

*Reuse and refill
targets*

*Bans on certain types
of packaging*



*Recycling
targets*



*Recycled content
targets for plastic in
packaging*



*Recyclability
assessment for all
packaging*



*Ecomodulation
of EPR fees*



*Packaging waste
reduction targets*



*Mandatory EU
labelling*

*Packaging
minimisation*



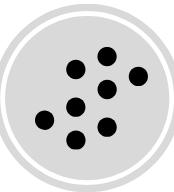
RECYCLE



Recycling targets



All packaging shall be recyclable via recyclability assessment



Recycled content targets for plastic in packaging



Recyclability requirements for all packaging

By 2030

Comply with Design 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:

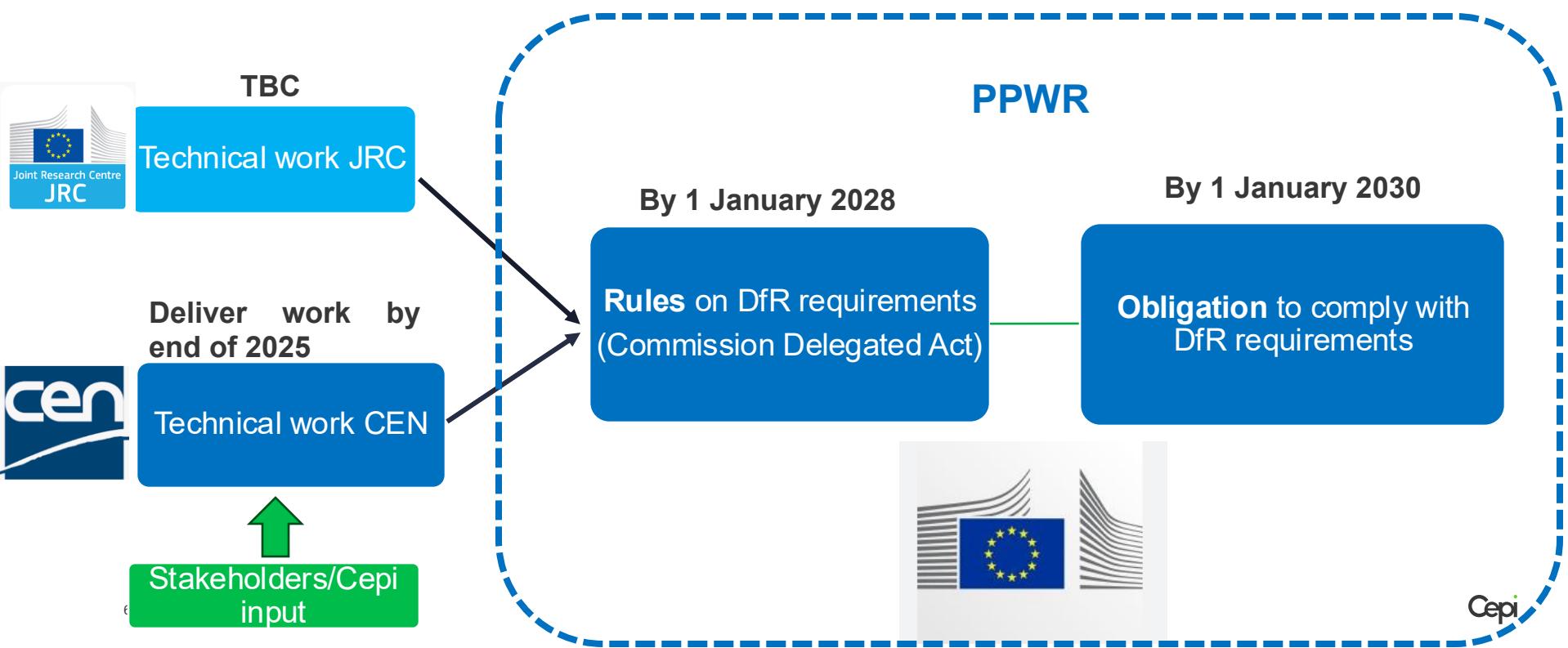
1. Paper/cardboard packaging

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

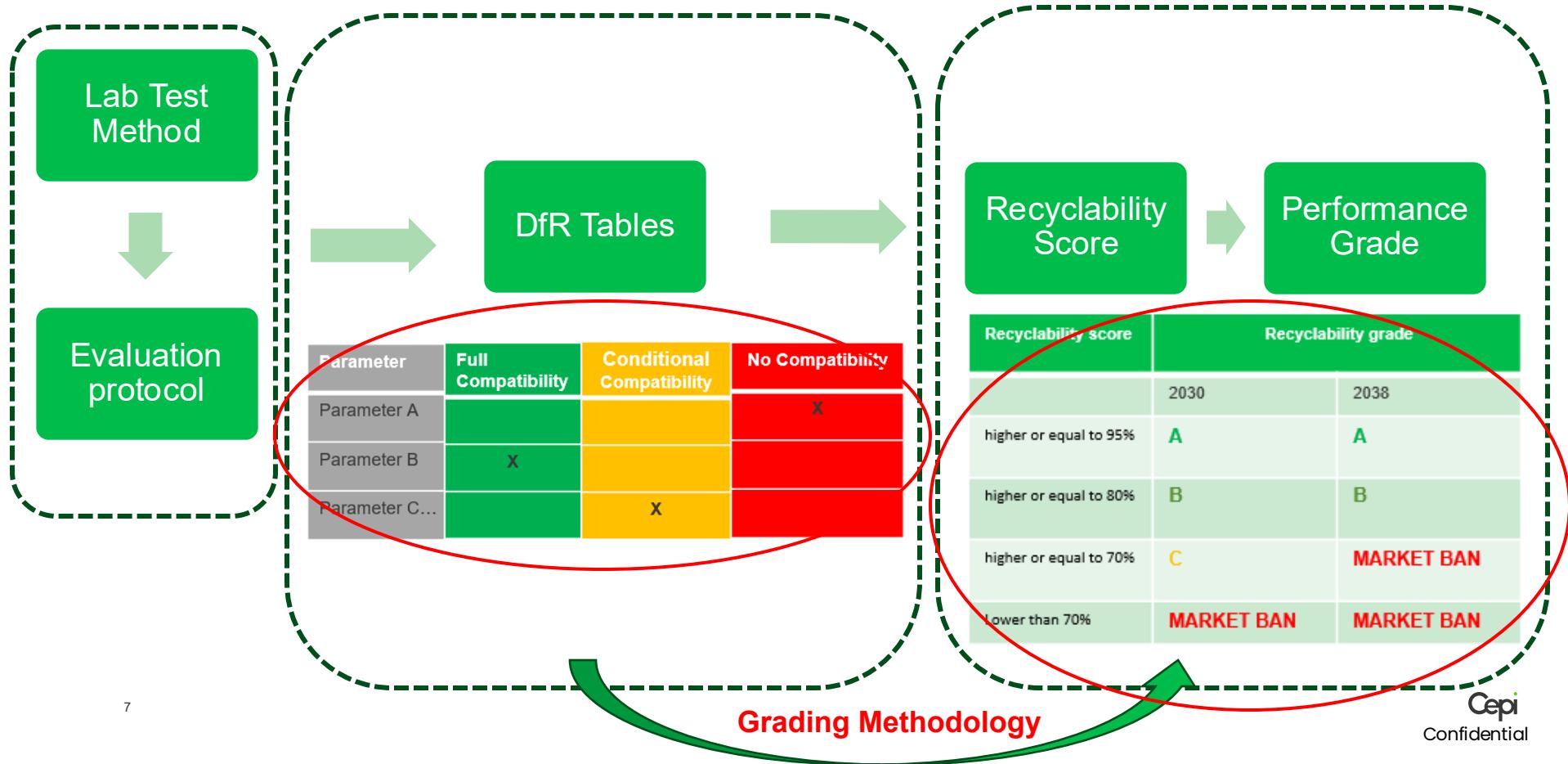
The assessment will provide a recyclability score -->

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

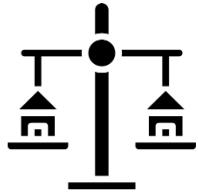
PPWR Design for Recycling criteria - process



Framework for DfR assessment



Cepi position on approach to Design for Recycling



Be comparable across material sectors:

Ensure a **level playing field** and mitigate risk of a **comparative disadvantage** for paper vis-à-vis competing materials



Avoid mandatory laboratory testing for each packaging.

Testing may still be required in certain cases to inform the DfR tables and incorporate packaging innovations.



Assess according to design for recycling tables:

Listing the compatibility of parameters/components with a given recycling process.



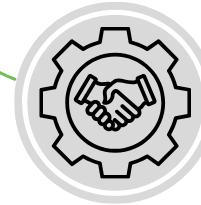
When testing, the laboratory test method and evaluation protocol based on Cepi and 4EG deliverables to be applied.

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



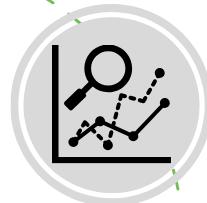
Legal uncertainty on the scope and timeline of certain policy measures.

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.

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



WAY FORWARD

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

Renewable. Circular. Sustainable.

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The European coalition for
Renewable, Circular, Sustainable Fibre-Based Packaging

Fibre Packaging Europe is an informal coalition of seven trade associations from Europe's forestry, pulp, paper, packaging, board and carton production and recycling industries.

epi

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



4ever
green

Perfecting
circularity
together





4ever green

4evergreen is a cross-industry alliance of over 110 members representing the entire lifecycle of fibre-based packaging. Together, they share expertise to develop tools and guidelines for an even more sustainable sector.

4evergreen's goal is to raise the overall recycling rate of fibre-based packaging in Europe to:

90% by 2030

110+

**COMPANIES FROM THE
EUROPEAN FIBRE-BASED
PACKAGING VALUE CHAIN**



value chain

Together, we can adopt a holistic approach and look at the full life cycle of fibre-based packaging.



4evergreen members by segment



SEGMENT 1: TECHNOLOGY & RESEARCH

Bobst
BHS Corrugated
Heidelberg
Innovhub
Kadant
KCL
Koenig & Bauer
PROPAKMA
PTS
RISE
Valmet
Voith
Circular Analytics
Ecol Studio



SEGMENT 2: PULP, PAPER & BOARD MANUFACTURERS & RECYCLERS

Ahlstrom
Aspapel
Billerud
Burgo
CMPC
Delfort
DS Smith
Felix Schoeller
Heinzel Group
Holmen
Koehler
Metsä Board
MM Group

Mondi
Palm
Paptic
Sappi
SCA
Smurfit Westrock
Sonoco
Stora Enso
Suzano
RdM
UPM
Weig Karton
Wepa



SEGMENT 3: NON-FIBRE MATERIAL SUPPLIERS (INKS, ADHESIVES, COATINGS)

Actega
Aquapak
Archroma
Avery Dennison
BASF
Covestro
Dow
Henkel
HB Fuller
HP Inc
Huber Group
Kemira
Kuraray
Leonhard Kurz
NatureWorks
Omya
Siegwerk
Solenis
Taghleef Industries



SEGMENT 4: PACKAGING PRODUCERS & CONVERTERS

Amcor
Baumer hhs
Constantia Flexibles
Elopak
Graphic Packaging Intl
Huhtamaki
Nissha
Pulpex
Royal Vaassen
Schur Group
Sealed Air
Solidus Solutions
SEDA
SIG Combibloc
Tetra Pak
Walki



SEGMENT 5/6: BRAND OWNERS

Amazon
Apple
CJ CheilJedang
Danone
Estee Lauder
Ferrero
Flora Food
IKEA
Kellanova
KraftHeinz
LEGO Group

Lindt
L'Oréal
MARS
McDonald's
Mondelez
Nestlé
PepsiCo
Philip Morris Intl
Procter & Gamble
Tchibo
Unilever



SEGMENT 7: WASTE MANAGEMENT & EPR SCHEMES

Citeo
Comieco
Expro
FBCA
Fostplus
Pellenc
Veolia



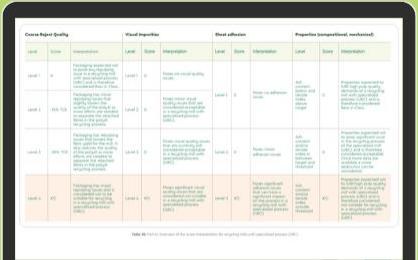
ASSOCIATE MEMBERS

ECMA
FBCA
ProCarton
NextGen Consortium
ICP
WMU

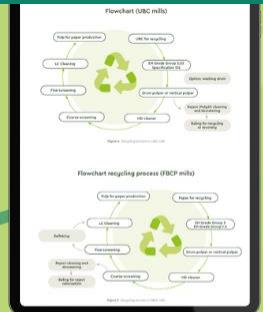
our technical toolbox

4evergreen's goal is to achieve a **90%** recycling rate for fibre-based packaging by **2030**.

“Fibre-based Packaging Recyclability Evaluation Protocol”



“Circularity by Design Guideline”



“Guidance on the Improved Collection and Sorting of Fibre-based Packaging for Recycling”



Download the toolbox here:

<https://4evergreenforum.eu/about/industry-tools-and-guidelines/>

In essence, this concerns practical matters, such as looking at the number of recycling streams households are dealing with, the types of packaging they encounter, and the advice they receive on how or where to discard what packaging.

In this guidance, a distinction is made between two dominant collecting collection streams for fibre-based packaging: the household stream and the industrial stream.

EU Packaging & Packaging Waste Regulation (PPWR)

Although 4evergreen was established before the PPWR, the regulation has shifted the work of the Alliance from ambition to essential. Our approach includes:



TARGET

The PPWR sets the target for the recycling rate of paper and cardboard packaging at 85% by 2030. **4evergreen aims to raise the recycling rate of fibre-based packaging to 90% by 2030.** Being aware of the secondary legislation is essential to reaching the set goal.



GOAL & ALIGNMENT

Packaging requirements will be defined through PPWR secondary legislation. 'Design for Recycling' guidelines and a methodology for assessing recyclability in a harmonised way are directly linked to **4evergreen work and deliverables.**



TECHNICAL EXPERTISE

4evergreen develops tools (guidelines and protocols) to further increase the already high recycling rate for fibre-based packaging, perfect packaging recyclability, and develop future-focused innovations, all of which are **common objectives shared with the PPWR.**

how we collaborate across the value chain

Leveraging the know-how from the only cross-value chain Alliance



UNDERSTANDING

To better understand the **changing packaging landscape** and its implications for the industry and our guidelines, We aim to collect and leverage the expertise of over 300 experts across the value chain in the development of our deliverables in various work streams, webinars, panel discussions, etc.



ENGAGEMENT

The technical work remains essential to position **4evergreen as the go-to source for technical information in the PPWR secondary legislation** process. 4evergreen provides inputs to standardisation bodies based on its deliverables and collaborates with the industry to promote fibre-based packaging.



STANDARDISATION

The purpose is to promote 4evergreen's technical deliverables for consideration in the **ongoing standardisation activities** as representative of the fibre-based packaging value chain.

EU Packaging & Packaging Waste Regulation (PPWR)

How does the 4evergreen toolkit relate to the regulation?



TEST & EVALUATION

The 4evergreen **recyclability evaluation protocol** assesses the recyclability of fibre-based packaging, providing insights into **how a specific fibre-based packaging product suits different paper recycling processes**. The test method and evaluation protocol contribute to evidence-based design for recycling criteria.



CIRCULARITY BY DESIGN

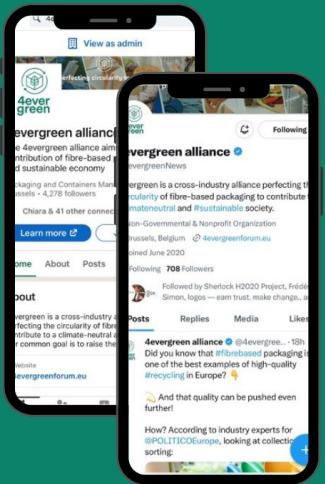
4evergreen's **Circularity by Design Guideline** for Fibre-Based Packaging is a type of Design for Recycling Guideline. It includes **specific recommendations to help create new fibre-based packaging solutions that can be collected, sorted, and recycled at scale**.



COLLECTION & SORTING

4evergreen's **Guidance on Improved Collection and Sorting of Fibre-based Packaging for Recycling** provides a framework for future infrastructure development to realise 4evergreen's targets and **meet EU recycling requirements**.

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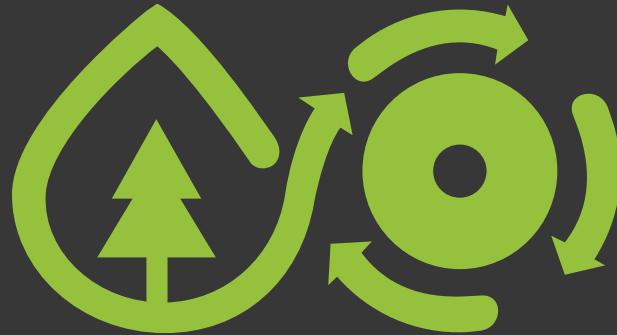


4evergreen alliance



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EUROPEAN

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