







ORGANISATIONS
FROM THE EUROPEAN
FIBRE-BASED PACKAGING
VALUE CHAIN



perfecting circularity together

# TABLE OF CONTENT

1. Message f	rom the Chairs		5
2. Governan organigramı			7
3. Membersl	hip		13
4. Highlights technical wo			15
5. Communi outreach hig			17
6. 4evergreen members			23





# 1. Message from the Chairs







Sarah Price, Chair

Andreas Walser, Co-Chair

2023 proved to be a year filled with growth and success for 4evergreen, and we wish to take this opportunity to recognise and acknowledge the superb expertise and commitment offered by our members, supporting partners and the 4evergreen team. The highlights and achievements presented in this annual report are a great testament to the constructive collaboration that 4evergreen enables across our fibre-based packaging value chain.

Reflecting on 2023, we'd like to call out a few landmarks:

Members agreed to extend the alliance's lifetime for another two-year period, until at least the end of 2026, and approved a set of strategic recommendations that will shape our future

Members voted to renew 4evergreen's governance in 2023, by appointing a new Steering Group and reorganising the leadership of our workstreams

Our membership reached 110 members an absolutelu encouraging signal that 4evergreen's contribution to perfecting circularity continues to gather momentum and deliver value

2023

A heartfelt thank you goes out to all past and present members of our governing bodies and working groups. Your invaluable contributions breathe life into 4evergreen!



In June, we launched the second version of our Circularity by Design Guideline for Fibre-Based Packaging, which enhanced recommendations for the standard recycling process, and addressed the compatibility of fibre-based composite packaging components (such as beverage cartons and paper cups) with specialised recycling processes.

Our November Annual Conference was an opportunity to reflect on our activities together, discuss the packaging landscape with key stakeholders and celebrate some key circularity successes that have come from members' initiatives.

In December, we launched the second version of our Guidance on the Improved Collection and Sorting of Fibre-Based Packaging, building on the 2022 version and incorporating the latest industry insights, offering practical recommendations to enhance collection and sorting systems.

2024

Now looking at 2024, our focus will centre on achieving the intermediate goals set for 2025, particularly regarding industry adoption of our tools and enhancing the recycling of fibre-based packaging used for household, out-of-home and on-the-go consumption.

This year, we are working to finalise the 4evergreen toolbox (guidelines, protocols, etc.) and have important publication launches and initiatives planned across our four technical workstreams. We will also kick off a new approach to create 4evergreen's vision and roadmap to further advance innovation.

From a communications perspective, in 2024 we are taking steps to raise awareness within the value chain: we will be 'taking to the streets' with the launch of a new Ambassadorship programme, ensuring 4evergreen representation at key industry and circularity events to drive industry awareness and use of our tools and guidelines.

At the same time, our new cross-workstream group within the alliance will focus on contributing to the EU-level standards on recyclability and design for recycling that are expected from the European Commission. We want to ensure our knowledge and expertise are taken into consideration in these delegated acts that will follow the approval of the upcoming Packaging and Packaging Waste Regulation.

We extend our sincere gratitude to all members of 4evergreen for their unwavering support. Together, we have come a long way and we can collectively strive towards a more sustainable and circular future for fibre-based packaging.

> Sarah Price, Chair Andreas Walser, Co-Chair





# 2. Governance and organigramme

4evergreen has a governance structure based on different governing bodies and workstreams.

#### **Governing bodies**

#### **Sponsors' Council**

The Sponsors' Council deliberates on the strategic decisions regarding the alliance and is in charge of the budget, including participation fees.

It is composed of representatives from 4evergreen's sponsors and associates.

Sponsors are member companies in the value chain of fibre-based packaging adhering to the purpose of the alliance.

Associates are organisations relevant to the initiative (research institutes, extended producer responsibility organisations, not for profit associations or alike) that do not meet the criteria for admission as Sponsors. Unless otherwise provided, Associates enjoy the same rights and obligations as Sponsors.

The Sponsors' Council (Council) is chaired by the Chair, or, in their absence, by the Co-Chair.

#### **Steering Group**

The Steering Group provides strategic direction to the alliance.

Its members are elected by and as representatives for their segments. It is comprised of senior managers with a clear interest in the delivery and outcome of the alliance. They represent the opinions and views of their segment in the Steering Group and act as a 4evergreen advocate within the industry and across the value chain.

The Steering Group gives strategic direction to the alliance and is in charge of its governance by electing the Treasurer and the workstream Co-leads, and issuing Terms of Reference to bodies in the alliance.

Steering Group members support and monitor the progress of the alliance, representing 4evergreen externally.

#### Secretariat

4evergreen is hosted at Cepi (the European association representing the paper industry) and managed by the Programme Director, who is responsible for the execution of the Steering Group decisions and daily management of 4evergreen.

The Secretariat is responsible for coordinating all internal communication, quality control for external communication, daily management and operations – including managing and communicating information between members of 4evergreen and its workstreams.

At the end of 2023, 4evergreen elected new leaders and members of the governing bodies and workstreams.

#### Steering Group leadership and members

In January 2024, the alliance welcomed a new Chair and Co-Chair:

- Sarah Price, Chair, Director of Sustainability at Sappi
- Andreas Walser, Co-Chair, Managing Director at Prinzhorn Group

Sarah Price was Co-Chair in 2023 and succeeded Hans Wortman (WEPA), who had been chairing the Alliance since 2020.

4evergreen has also elected new Steering Group members. The new and re-elected members of this group reflect the expertise of the different segments within the value chain:

- Technology Providers: Thierry Robert (BOBST);
- Pulp producers, Paper & Board manufacturers and Recyclers segment: John Melia (DS Smith),
  Maija Aho (Stora Enso), Markku Leskelä (Metsä Group), Marc Van der Velden (Smurfit
  Kappa), and Natasha Chorlton (Ahlstrom);
- Brand owners & Retailers segment: Jürgen Dornheim (Procter & Gamble), David Guerin (L'Oréal), Rob Hoitink (Nestlé), and Anthony Johnson (Unilever);
- Non-fibre Material Suppliers segment: Bernhard Kainz (Dow), Daniel Drochner (Siegwerk), and Thomas Schiele (BASF);
- Converters & Packaging Manufacturers segment: Andreas Helbig (SEDA), Heike Schiffler (Tetra Pak), and Mike Turner (Graphic Packaging International).



Members of the Steering Group who have stepped down from the role in 2023 are Steven Stoffer (Smurfit Kappa), Sarah Price (Sappi, now Chair of 4evergreen), Christina Northfleet (Omya), Arne Jost (Henkel), and Christophe Charlier (Nestlé).

#### Sponsors' Council leadership

The new Treasurer, leading the Sponsors' Council, is Hans Wortman (WEPA), replacing Ralph Mack (Graphic Packaging International) and interim Treasurer Andreas Helbig (SEDA).

We extend our deepest gratitude to all current and past leaders and members of these bodies.





2023 ANNUAL REPORT 2023 ANNUAL REPORT

#### **Workstreams**

The workstreams of 4evergreen in 2023 included:

WS-1 - Recyclability Evaluation Protocol workstream

WS-2 - Design Guidelines workstream

WS-3 - Collection & Sorting Guidelines workstream

WS-4 - Innovation workstream

WS-5 - Information workstream

Each has specific Terms of Reference, prepared by each workstream and issued by the Steering Group.



#### Workstream leadership

In total, more than 380 packaging engineers and circularity experts participate in the work of 4evergreen. Each workstream is led by the relevant Co-leads, who changed at the end of 2023.

Current Co-leads are:

Workstream 1 - Recyclability Evaluation Protocol



**Johannes Zipfel** Delfort



Raymond de Schrevel EXTR:ACT



Hengesbach Stora Enso

Workstream 2 - Circularity by Design Guideline



**Davide Braghiroli** Tetra Pak



**Kiril Dimitrov** Nestlé

#### Workstream 3 - Guidance on the Improved Collection and Sorting



Guillermo Vallés Saica



Jonathan Edmunds DS Smith

Workstream 4 - Innovation



**Thomas Walther** Baumer hhs



**Lars Axrup** Stora Enso

Workstream 5 - Information

#### Working Group 1 (external and internal communications)



Maria Holopainen Stora Enso



**Regina Knoll** WestRock



**Renata Braga Neperus** 



**Nina Peacock** Elopak Kellanova

Working Group 2 (public affairs)



**Marcelle Reichert** SIG



**Susan Brunner** Mondi

Co-leads who have contributed to the alliance's success throughout 2023, before stepping down from their role are:

Gustavo Duarte (Sappi), Alexey Vishtal (MM Group), Eva Lindström (SCA), Ralph Mack (Graphic Packaging International), Andreas Faul (Propakma), Elodie Bugnicourt (Graphic Packaging International), Mario Wiltsche (Heinzel), Sandeep Kulkarni (NextGen Consortium), Susanne Haase (4evergreen's Programme Director), Anna Papagrigoraki (Cepi), Tytti Peltonen (Metsä Group), Michael Hoffmann (Huhtamaki), and Michel Willems (Smurfit Kappa).

A heartfelt thank you to all current and past Co-leads and workstream members, who make the work of the alliance possible.







**Susanne Haase Programme Director** 

#### secretariat

budget / communications / meeting facilitation



Giulia Fadini **Innovative Project Manager** 

Sofia Michalopoulou **Coordination & Alignment** 



**Michele Rattotti** Project Manager

**COORDINATORS GROUP** 

#### sponsors council

fees & budget / governance participation in workstreams



**Hans Wortman** Treasurer (WEPA)

Cepi **ENVIRONMENT &** SAFETY COMMITTEE

Aho

Bobst

TECHNOLOGY PROVIDERS

WS-1 - recyclability

protocol

Co-leads

Stora Enso

EXTR:ACT

Delfort

**Max Lootens** 

Accenture

Johannes Zipfel

Peter Hengesbach

Raymond De Schrevel

Chorlton



Sarah Price Chair of 4evergreen (Sappi)

Cepi RECYCLING COMMITTEE



**Andreas Walser** Co-Chair (Prinzhorn Group)

#### steering group

strategy & priorities / operational direction

BASF



Leskelä Melia van der Velden Drochner Stora Enso Ahlstrom Metsa Group DS Smith Smurfit Kappa Siegwerk

WS-2 - design

guideline

**Co-leads** 

Tetra Pack

Kiril Dimitrov

Nestlé

Davide Braghiroli



Kainz



Helbig

Seda







P&G







Guerin Unilever L'Oréal



**Project Manager** 





Seg. 3: NON-FIBRE MATERIAL SUPPLIERS

Dow

Seg. 4:
PACKAGING PRODUCERS AND CONVERTES

Seg. 5: BRAND OWNERS & RETAILERS

#### workstreams

WS-3 - collection and sorting guidance

### **Co-leads**





Giulia Fadini

4evergreen alliance

Guillermo Vallés

Lars Axrup Stora Enso

WS-4 - innovation

Co-leads



Silvia Sulis

logos

**Thomas Walther** Baumer hhs

**WS-5** - information









WG-2 - public affairs & advocacy co-leads Susan Brunner Mondi







logos Ellen Skogster logos

(4EVERGREEN ORGANIGRAMME - MARCH 2024)





Charlotte Werner

Circular Analytics

# 3. Membership

4evergreen brings together members from across the entire packaging value chain: from paper and board producers to packaging converters, brand owners and retailers, technology and material suppliers, waste sorters and collectors, research organisations, technical universities and start-ups. This scale is unique for the fibre-based packaging industry.

The segments represented in 4evergreen's membership are:

- Technology providers (machinery & systems) 1.
- Pulp, paper & board manufacturers & recyclers 2.
- 3. Non-fibre material suppliers (inks, adhesives, coatings)
- Packaging producers & converters
- 5. **Brand owners**
- Food service providers & retailers
- Waste management & EPR schemes

In 2023, the alliance succeeded in increasing member participation across all segments, particularly in the brand owners, non-fibre material suppliers and technology providers segments, whose engagement raised significantly.

# **4evergreen members by segment**



**SEGMENT 1: TECHNOLOGY PROVIDERS** (MACHINERY & SYSTEMS)

Bobst **BHS** Corrugated Heidelberg Kadant Koenia & Bauer Valmet Voith



Ahlstrom Mondi Aspapel Paptic Billerud Sappi Burgo SCA CMPC Smurfit Kappa Delfort Sonoco DS Smith Stora Enso Heinzel Group Suzano Holmen RdM International Paper UPM Koehler Weig Karton Lucart Group Wepa Metsä Board WestRock



Actega Aquapak Avery Dennison **BASF** Covestro Dow Henkel **HB** Fuller HP Inc **Huber Group** Kemira Kuraray Leonhard Kurz Omya Siegwerk Solenis Sun Chemical

Taghleef Industries



#### **SEGMENT 4: PACKAGING PRODUCERS** & CONVERTERS

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



#### SEGMENT 5/6: **BRAND OWNERS**

2023 ANNUAL REPORT

#### **FOOD SERVICE PROVIDERS & RETAILERS**

Amazon MARS Apple McDonald's CJ CheilJedang Mondelez Danone Nestlé Estee Lauder NextGen Consort. Ferrero PepsiCo IKEA Philip Morris Intl Kellanova Procter & Gamble KraftHeinz Tchibo LEGO Group Unilever Lindt Upfield L'Oréal



**Packaging** 

**Producers &** 

Converters

द्वा

**Brand** 

**Owners** 

Waste

Management

**EPR** schemes

**Food Service** 

**Providers** 

& Retailers

Systems &

**SEGMENT 7:** WASTE **MANAGEMENT** & EPR SCHEMES

Research

**Institutes** 

Citeo Comieco Extract Expra Fostplus Pellenc

#### START-UPS

**Packaging Cockpit** Safi

Non-Fibre

**Materials** 

**Suppliers** 

Pulp, Paper

and Recyclers

& Board Manufacturers

Technology

Start-ups

**Providers** 

#### **RESEARCH INSTITUTES**

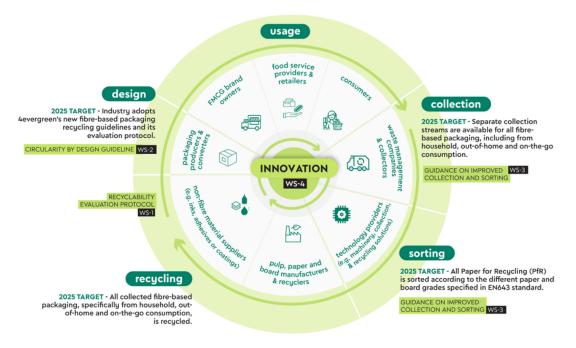
Celabor CTP **Ecol Studio** Circular Analytics Innovhub KCL PROPAKMA ICP - Pulp and Paper Institute, Slovenia PTS RISE Western Michigan University





# 4. Highlights from our technical workstreams

The alliance has four technical workstreams (WS-1, WS-2, WS-3 and WS-4), whose outputs are called deliverables.

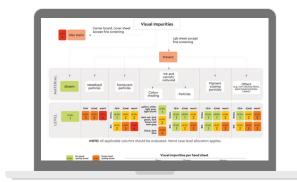


In 2023, our workstreams worked to deliver our technical tools and guidelines to enhance circularity for fibre-based packaging. Here are the key highlights of the year.

#### **Workstream 1 - Recyclability Evaluation Protocol**

WS 1 has been working to develop a harmonised, publicly available Recyclability Evaluation Protocol for fibre-based packaging. The protocol builds on the <u>Confederation of European Paper Industries'</u> (Cepi) harmonised <u>European laboratory test method</u> and, when completed, it will give the industry a common tool to evaluate how recyclable current and future packaging materials are.

After a beta release of the first version of the protocol – to measure recyclability in standard mills – was made available in December 2022, work is now focused on delivering future versions that will expand the tool to include recyclability in deinking and specialised recycling facilities. These versions are due for release in 2024.



#### Workstream 2 - Circularity by Design Guideline for Fibre-Based Packaging

4evergreen's experts are working on a guideline to ensure any new fibre-based packaging is designed with circularity in mind. The Guideline provides recommendations for designing packaging and materials that are easy to collect, sort, and recycle. After the first version, published in March 2022, providing recommendations for the standard recycling process, in June 2023 the alliance released the Circularity by Design Guideline Version 2.

This version further enhanced those recommendations, with new guidance on design choices for composite fibre-based packaging such as used beverage cartons (UBC) and packaging of similar composition. Future versions are due for release in 2024 and will include recommendations for floatation deinking mills and additional specialised recycling processes.



# Workstream 3 - Guidance on the Improved Collection and Sorting of Fibre-based Packaging for Recycling

Building on a Europe-wide review, this workstream has identified collection and sorting best practices that can support the alliance's aim to increase the fibre-based packaging recycling rate to 90% by 2030. The Guidance on the Improved Collection and Sorting of Fibre-Based Packaging for Recycling was published in September 2022. It covers all fibre-based packaging types, including those for household, out-of-home and on-the-go consumption.

In December 2023, we released the Guidance on the Improved Collection and Sorting of Fibre-based Packaging for Recycling to incorporate the latest industry findings, reinforcing the recommendations for optimal fibre-based packaging recycling. The document has been made easier to use as a reference point for effective collection and sorting practices across Europe, and its content is now in line with 4evergreen's other tools, adding to the alliance's efforts to create a comprehensive toolbox with consistent terminology and understanding that works at all stages of the packaging value chain.



#### **Workstream 4 - Innovation**

This workstream is focused on accelerating the development of technologies and processes that can increase the circularity of fibre-based packaging.

In 2023, work has been underway on three projects exploring sorting and recycling challenges for paper and board products with barrier functionality – on 'sortability', new recycling technologies and comparative recyclability impacts. The workstream has already conducted multiple tests which will be consolidated in a report. Their results will provide crucial input for the deliverables of the other technical workstreams.





# 5. Communications and outreach highlights

4evergreen's workstream 5 is in charge of developing a fact base and communication assets across different channels to inform, educate and engage with the 4evergreen target audiences, from industry to policymakers and consumers.

In 2023 the workstream continued its communications and outreach effort towards 4evergreen's stakeholders, to promote the alliance and its work.

Key highlights included the successful online session <u>"Get Sorted: Enhancing Fibre-based Packaging Circularity through Improved Collection and Sorting"</u>, during which participants heard from waste management experts about the distinct role of collection and sorting to increase the recycling rate of fibre-based packaging, the current opportunities and challenges, and how different sector players can collaborate to make the whole ecosystem work best.

#### **Circularity Success Stories**

In October, we launched our first Circularity Success Stories initiative, to collect and showcase breakthrough projects, whether individual or collaborative, that have been spurred by the alliance and can serve as inspiring examples of fibre-based packaging circularity and sustainability.

A total of 22 inspiring projects qualified, and five were showcased during 4evergreen's annual conference, "The Pathway to Circularity: from Guidance to Action":

#### 1. Addressing Recyclability Challenges

Aquapak - <u>Developing re-pulpable and bio-digestible barrier</u> <u>coatings for functional fibre-based packaging</u>





#### 2. Design for Circularity

SIG - SIG Terra alu-free full barrier





#### 3. Improve Collection & Sorting

Huhtamaki, Seda, Stora Enso, McDonalds – <u>The Cup Collective</u>







#### 4. Circularity Best Practices

Elopak - Tetra Pak - SIG - Palurec PolyAl Recycling Plant





## **5. Landmark Investments Project enabling our Key Targets**

DS Smith, Fibre and Paper Development Laboratory ("Fibre Lab")





With the annual conference, we also celebrated 4evergreen's third anniversary, including a dedicated report to retrace the alliance's success since it started its technical activities. Members gathered in Brussels to recognise the alliance's achievements and explore how to maximise industry uptake of 4evergreen's circularity toolbox, listening to prominent guest speakers discuss the challenges and opportunities for the sector.









In parallel, we have continued to inform our audience about our work, tools and guidelines via our digital media channels, podcasts and newsletters, and our media outreach.

We have also engaged policymakers, industry associations and other stakeholders with a series of outreach efforts including events and media activities.







17

#### Communications and outreach achievements

#### external communications

10

interviews



143

engaged journalists 8

press releases



2

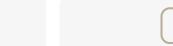
awards



Paper360° 2023 Top 50 Power List



European Paper Recycling Council Awards



+2,5K

media mentions



videos



+750

followers



+700

newsletter subscribers

# in -200

+5200

followers



2

podcast episodes

"The rise of Circularity by Design"

"Perfecting Circularity:
Beyond Design for Recycling"

#### engagement

1

letter to the European Commission



4

op-eds



1

info session





3

workshops



outreach events



1

mayors campaign



25

policy makers engaged



**15** 

industry associations engaged

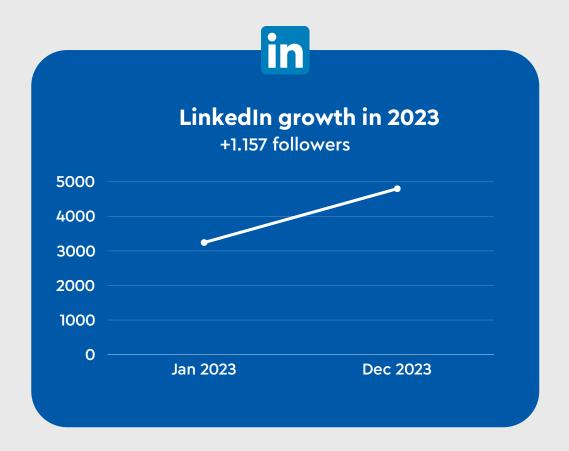
(4EVERGREEN ACHIEVEMENTS - MARCH 2024)



newsletters

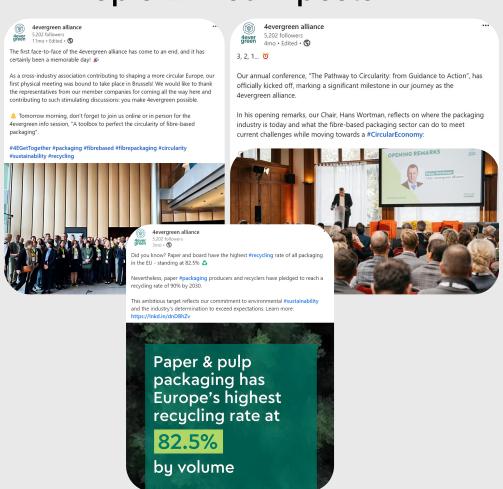


# Social media highlights





## Top 3 LinkedIn posts



### Top 3 X posts



**4evergreen alliance** @4evergreenNews **3** Today is **#GlobalRecyclingDay!** 

Did you know that **#fibre** can be recycled up to 25 times?

At 4evergreen, we emphasise the #circularity of fibre-based #packaging and the need to boost #recycling rates.

That's how we build a greener future 💙



**4evergreen alliance** @4evergreenNews

1 hour left! 0

The conference "Pathway to Circularity" is about to begin!

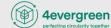
Our in-person participants are arriving, and the excitement is building.

Stay tuned for the start of the conference at 13:30 CET.



4evergreen alliance @4evergreenNews

The first 4evergreen newsletter is out and, with it, our team's insight piece into the expected growth for the fibre-based #packaging industry!





# 6. 4evergreen members









4evergreen c/o Cepi

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<u>4evergreen@cepi.org</u> <u>www.4evergreenforum.eu</u>