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Paper-based packaging for food security, circularity and a competitive bioeconomy

Why paper-based packaging is a strategic European industry, and how we can scale.

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The renewable materials company



Food security starts before food reaches the table

Packaging is not “just wrapping”. It is a protective system:

- it keeps food safe,
- extends shelf life,
- enables transport, and
- reduces avoidable losses.



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Paper-based packaging is already part of everyday food systems



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Fibre-based packaging is already part of everyday food systems

- **Protects essential products** — from milk and dairy to frozen foods, while providing consumers with vital information.
- **Enables efficient logistics and trade** — including high-volume transport and B2B applications.
- **Meets demanding safety standards** — including food-contact, hygiene, product-safety, and pharmaceutical requirements beyond the PPWR.

Protects. Preserves. Performs.



- Safe food for months
- Less food waste
- Moves efficiently
- No cold chain

Circularity is already an industrial reality for paper-based packaging



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83%

paper-packaging
recycled in Europe



90%

recycling rate ambition of
Industry by 2030



75%

Europe's paper-based
packaging comes from recycled
paper and board

A European economy, not just a packaging material

Paper-based packaging links sustainable forestry, mills, converters, recyclers, food producers, retailers, and consumers. Value is

created, used and recovered in Europe:

710 k+

people employed by the EU fiber-based packaging sector

€110.4b

Annual turnover

Packaging is a practical bioeconomy outlet because demand already exists and infrastructure is already in place



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Less fossil dependency. More European resilience



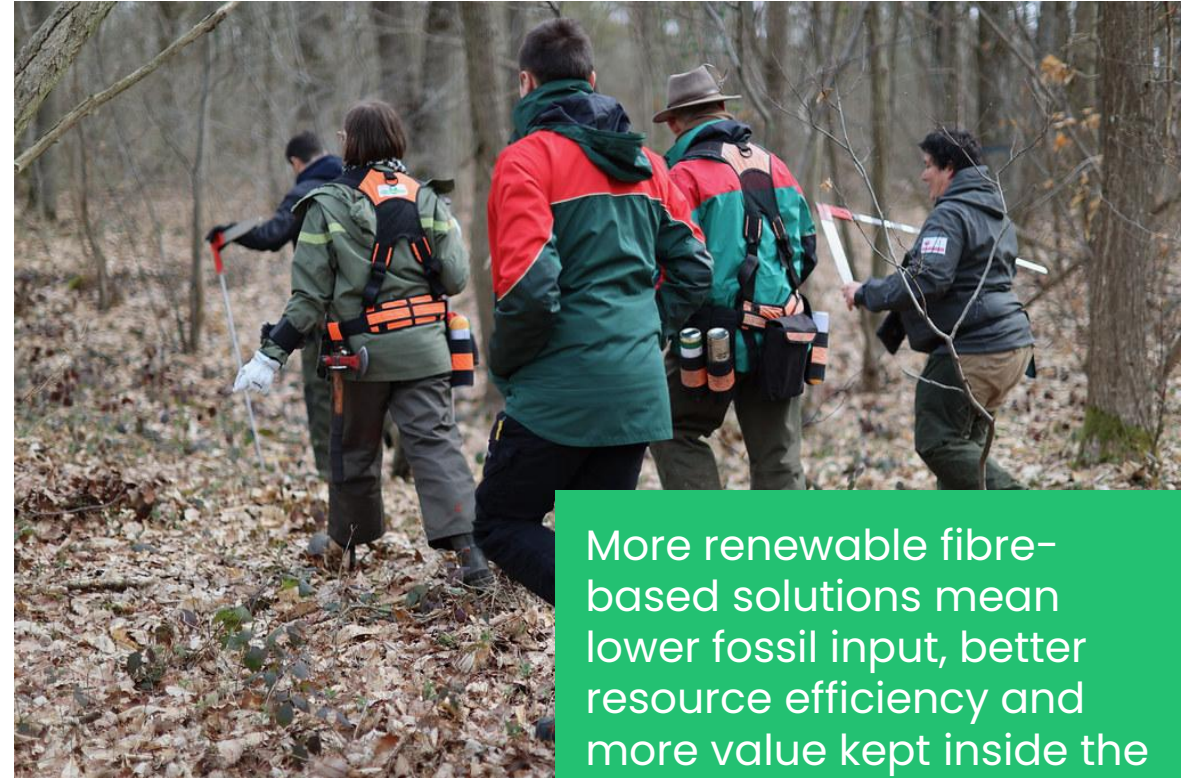
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The current model remains linear and fossil based



Too much reliance on fossil-based materials and imported feedstocks exposes Europe to volatility, emissions and geopolitical dependency

The new bioeconomy path



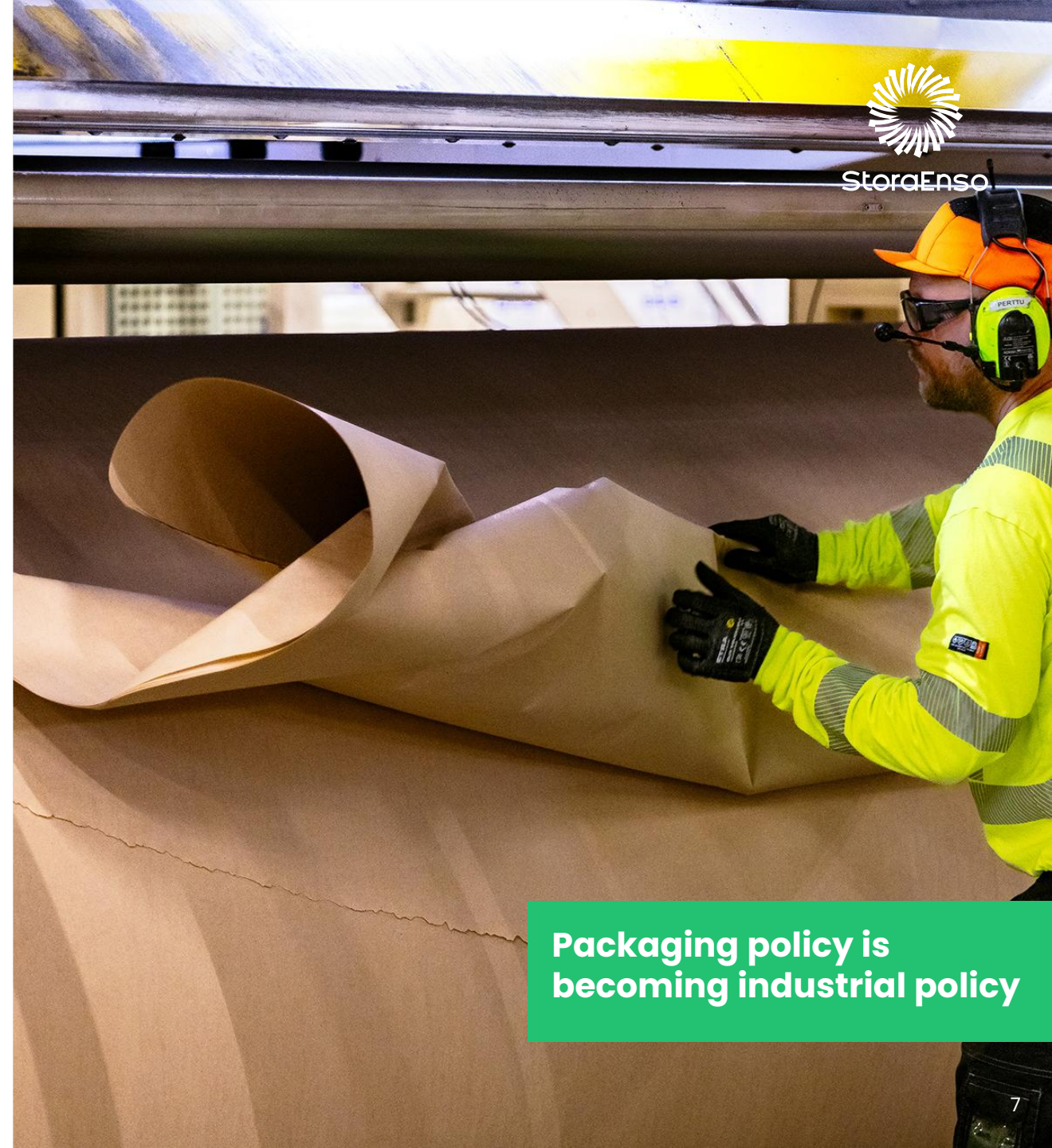
More renewable fibre-based solutions mean lower fossil input, better resource efficiency and more value kept inside the European economy.

PPWR raised the bar. Not a niche issue. A competitiveness issue.

The new EU Packaging and Packaging Waste Regulation aims to make packaging more circular and sustainable.

With these rules change, the impact is across the whole value chain, from farmers to manufacturers.

Impact is huge: PPWR is one of the most intensely lobbied EU files. This is because packaging sits at the centre of economy, it reaches, from material producers and manufacturers to food companies, retailers, and recyclers.



**Packaging policy is
becoming industrial policy**

What PPWR implementation must get right

Europe should preserve the environmental ambition of PPWR while enabling the materials that can deliver circularity, competitiveness and food protection:

- **Clear design-for-recycling rules**
- **A harmonised Single Market**
- **Science-based rules**
- **Recognition of fibre's role**
- **Acknowledgement of essential packaging (perishable food)**
- **Simpler EPR rules – Harmonise the EU packaging market**



The coming PPWR rules will shape the market

PPWR is only the starting point. The detailed rules now being developed will decide whether circular materials can scale in practice.

- **Design-for-recycling criteria**
- **Recyclability at scale rules**
- **EPR and eco-modulation**
- **Labelling rules**

The key test: reward materials that protect products and can be recycled in real systems.



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Future-proof rules enable innovation and investment

Europe needs ambitious rules, but ambition works best when the framework is stable, coherent and open to better technologies.

- **Set outcomes, not technology lock-ins**
- **Keep timelines stable and predictable**
- **Allow functional barriers where needed**
- **Avoid sudden changes of direction**

We can invest and scale fibre-based solutions when the direction of travel is clear.



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Protect food security

Circularity rules should help packaging do its first job well: protect food, keep supply chains moving and reduce avoidable losses

- Clear design-for-recycling rules keep proven fibre formats scalable
- Harmonised Single Market rules avoid fragmentation and disruption
- Science-based barrier and substance rules preserve food safety
- Predictable implementation gives confidence to invest in capacity

The result: resilient food systems and more renewable packaging made in Europe.



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