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Paper and board packaging: a tool to improve product sustainability

Sorrento, September 19, 2014



agenda

1

Comieco for paper
and board recycling
The Consortium
and its achievements

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Comieco for packaging
user companies
The Paper and Board Club



FIAT 500 by Chris Gilmour
(cardboard and glue, life size)

about Comieco

Comieco was established in 1985 as a free association of companies in the paper sector.

In 1997, following the implementation in Italy of the European directive on packaging and packaging waste, it was incorporated as a Consortium and today it ensures the separate collection and recycling of paper, board, and cardboard all over Italy.

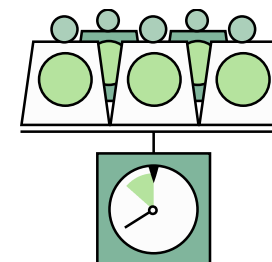
Comieco has approximately 3,400 member companies, including manufacturers, importers of raw materials and paper and board packaging, as well as recovered paper processing plants.

The environmental contribution fees charged by Comieco to companies are among **the lowest in Europe:**
only **4€/ton** (vs. 30€/ton in 2008)

Comieco results in a nutshell

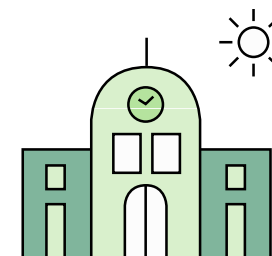
10
tons

Of recovered paper were recycled every minute in 2013 in Italy



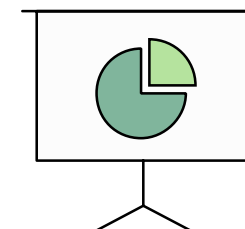
88
Million EUR

Is the amount transferred in 2013 to the Italian municipalities under the agreements by way of consideration



86
%

Is the recycling rate of paper and board packaging collected in 2013

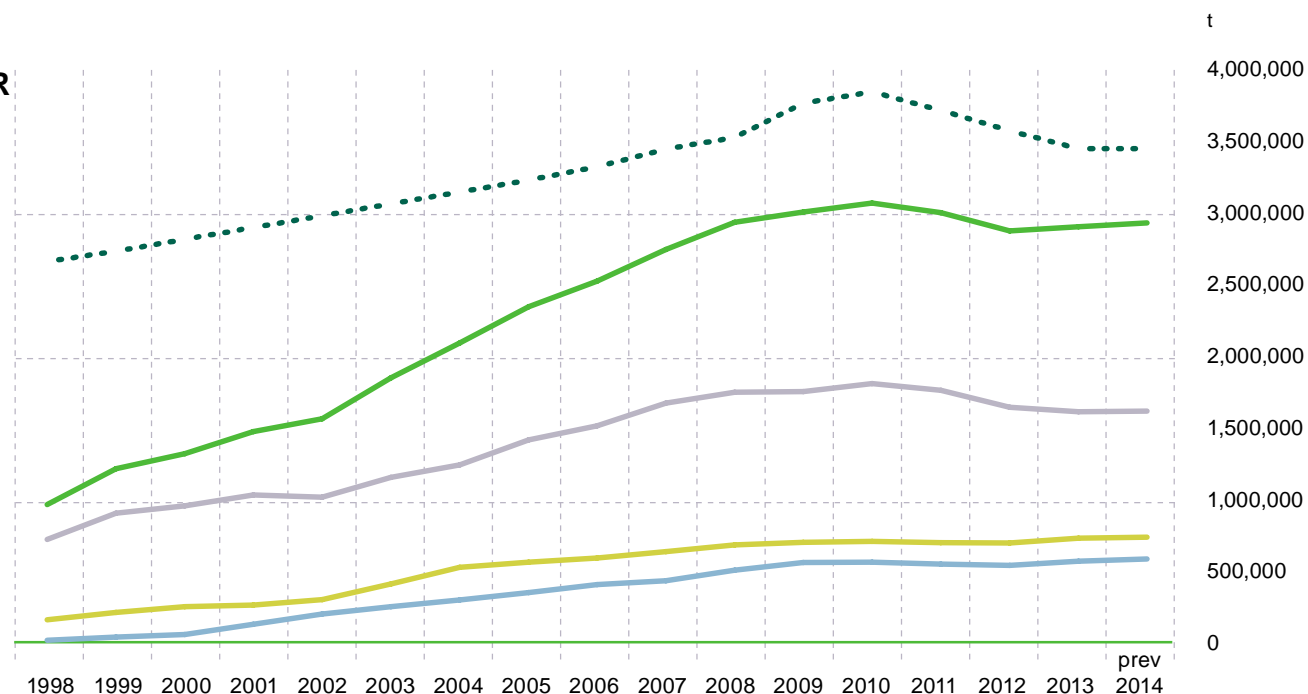


separate paper and board collection in Italy: from 1 million tons to almost 3 million tons in 15 years

MUNICIPAL SEPARATE PAPER AND BOARD COLLECTION. 1998-2013 TREND AND 2014 FORECASTS.

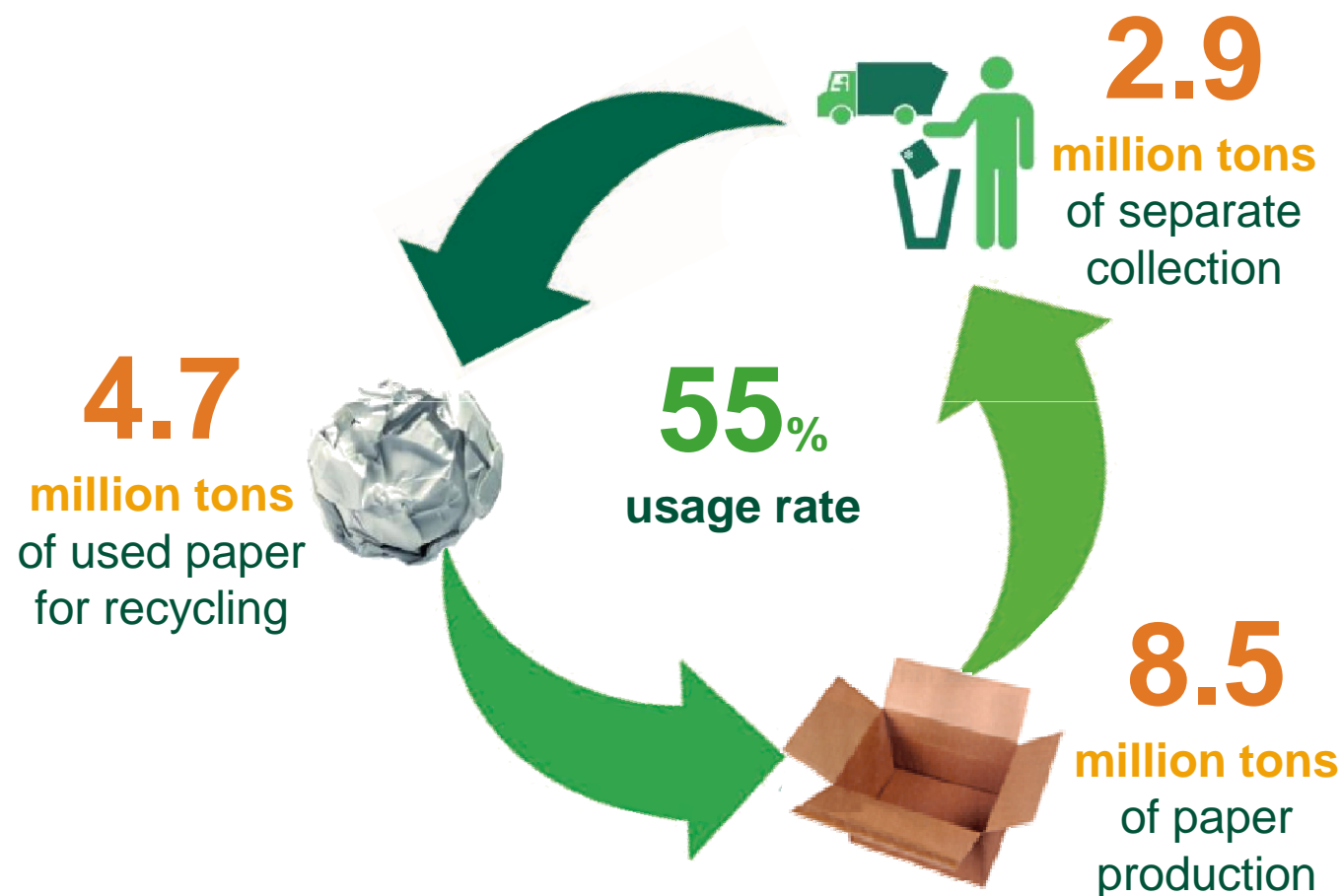
(Source: Comieco)

- North
- Centre
- South
- Italy
- ... Limit Italy



		NORTH	CENTRE	SOUTH	ITALY
2013	t	1,617,743	725,202	564,082	2,907,028
2014 forecast	t	1,621,773	730,747	578,833	2,931,403

paper production in Italy in 2013: high recycling rates



packaging paper and board in Italy

Year	Production		Import		Export		Apparent consumption	
	1.000 t	Δ%	1.000 t	Δ%	1.000 t	Δ%	1.000 t	Δ%
2008	4.434,3	-5,3	2.258,3	-5,5	1.128,1	-2,2	5.564,5	-6,0
2009	3.877,0	-12,6	2.228,9	-1,3	1.103,2	-2,2	5.002,8	-10,1
2010	4.276,5	10,3	2.569,3	15,3	1.250,2	13,3	5.595,5	11,8
2011	4.177,7	-2,3	2.575,0	0,2	1.223,4	-2,1	5.529,3	-1,2
2012	3.892,5	-6,8	2.591,3	0,6	1.224,0	0,0	5.259,9	-4,9
2013	3.992,7	2,6	2.500,2	-3,5	1.297,2	6,0	5.195,6	-1,2

commitment towards the municipalities

From 1998 to 2013, Comieco managed the collection of almost 24 million tons of paper for recycling, and paid more than 1 billion EUR considerations to the municipalities.

On top of this, Comieco is also proactively helping municipalities increase their separate paper and board collection results by:

- funding the purchase of technical equipment (Ancitel)
- organizing specific plans to boost separate collection
- providing powerful communication tools that can either improve paper and board collection results (e.g. Cartoniadi) or arouse the awareness of citizens with respect to the issue

commitment towards paper-based packaging user companies

Comieco is committed to develop a common culture based on sustainability among manufacturers, packaging user companies, and the whole supply chain.

According to the hierarchy defined by the European law, prevention is the key issue.



Multiple Comieco initiatives throughout the year to promote sustainability

- ❖ Workshops and co-op projects with **Italian Universities** to design innovative paper and board packaging units
- ❖ **Lifestyle analysis** (how and when packaging affects everyday life)
- ❖ Monitoring of national and international achievements in view of sustainable packaging and the promotion of **best practices**
- ❖ **International studies and research** on how to improve both recyclability (Italian Aticelca Method) and the eco-design of paper and board products in view of easier recycling (EcoPaperLoop, Centrel Europe Project)
- ❖ Sustainable packaging **promotion** in general

a unique project: the Paper and Board Club

The new idea: Comieco partners with packaging user companies (Paper and Board Club) to help them find and conceive new and better solutions for their packaging needs in terms of sustainability

Why? What happened?

1. A number of important brands developed a green mindset and announced the elimination or reduction of paper and board packaging.
2. A demoscopic survey highlights that companies expect to reduce the use of packaging slowly but gradually in the future.
3. A second survey shows that packaging user companies are often not aware of the advantages of paper-based packaging, especially if compared against consumers perception of the same issues.

paper-based packaging: opposite perceptions?

	CONSUMERS	PACKAGING USER COMPANIES	Δ
	%	%	%
easy to recycle	94	92	-2
convenient for separate waste collection	87	92	5
easy to stock	83	92	9
can contain many products	94	84	-10
ecological, respectful of the environment	90	83	-7
nice, pleasant	87	83	-12
easy to move	91	79	-3
somehow elegant	81	78	-15
light, easy to handle	92	77	-17
better than other materials with a higher impact on the environment	93	76	-17
offers multiple decoration options	92	75	-17
aesthetically pleasant	80	75	-5
clean, wholesome	79	72	-7
suited for children	86	70	-16
safe, doesn't hurt, cut, etc.	78	70	-8
unbreakable	69	68	-1
cheap	85	67	-18
not bulky	75	64	-11

To prevent a dramatic decrease in paper and board packaging consumption, the launch of a PR action aimed at user companies was decided in order to:

- **convey positive messages on paper and board**
- **initiate a profitable dialogue with users**
- **address user needs**



sustainability as a new decision-making principle for consumers

Informed and “advanced” **consumers** are developing an environmental awareness that can turn into a decision-making principle for companies:

Quality of packaging

Reuse of packaging

Easy recycling

Focus on complex packaging

With the same performance and price (also in the light of the economic downturn), a “more sustainable” packaging unit can shift consumer buys.

The main challenge is for companies to understand WHAT consumers mean by sustainable.

the mission of the new stakeholders' forum: promote innovation and sustainability among user companies

The Club works to:

- meet user companies and address their needs
(small-scale meetings; one annual meeting; quick reply to their questions, etc.)
- provide useful tools and initiatives to support their activity and ongoing updating
(dedicated portal with reserved area and access to exclusive document downloading; newsletter; white paper; etc.)
- draft theme-specific reports and share new developments across the pipeline
(training workshops for companies; co-operation agreements; studies; etc.)
- ensure that users know how the whole paper and board recycling process works
(guided training visits to plants to show how the “cycle of recycling” is organized)

180 members :
owners and CEOs, packaging/R&D and marketing managers

Dal Colle

nuncas

ENERVIT
active nutrition

altromercato
commercio equo e solidale

IKEA

DESPAR

GrissinBon

The Coca-Cola Company

Prenatal

CONAD

NaturaSi
Il Supermercato della Natura

Amadori
Prodotto di Famiglia

SELEX

mila
SÜDTIROL

Carapelli
DAL 1893
FIRENZE

Barilla

THE BRIDGE

Henkel

FERRERO

LEGEA

parmalat

kraft foods

LAVAZZA

PERFETTI
van Melle

CRAI

MARS
italia

Fresco

Unilever

YOOX.COM

PRISMA
ARCHITECTURAL
PERFORMANCE
IN LIGHTING

TUCANO
URBANO

FRIO
comset

OIKOS

alce nero

Balconi

LEROY MERLIN

GUIDO GOBINO

environmental benefit for the paper industry

The primary function of packaging products is to protect the packed material. Sometimes non-paper components are necessary to satisfy the requirements of the packed product.

Nevertheless, the amount of non-paper components in packaging paper and board should be minimized for the benefit of recycling the fibrous material.

Good recyclability depends on good eco-design of paper and board products and ancillary materials.

Who is responsible for eco-design?



conclusion

Cartons are a perfect example of the Circular Economy?

In Italy they surely are!
Paper and board packaging are
collected and recycled,
as well as managed efficiently
throughout their life cycle.

conclusion

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thank you for your attention

