

Forest Products Europe Conference



March 3-5, 2025



Lisbon, Portugal

MONDAY 3RD MARCH

08:00

-15:30 **SITE VISIT | The Navigator Company's Setubal Mill & Nurseries**

Delegates will have an exclusive opportunity to tour The Navigator Company's Setúbal Mill and Nurseries, a leading European producer of pulp and UWF paper. The mill manufactures 550,000 tons of bleached eucalyptus kraft pulp annually and is a leader in renewable energy, featuring both natural gas and biomass cogeneration plants. Located just 45 minutes from Lisbon, this tour includes transportation, refreshments, and lunch. Spaces are limited and available on a first-come, first-served basis. Be sure to add this tour during registration to secure your spot.

10:00- **Pre-Conference Workshop | Surviving Europe's Regulatory Tsunami: An Interactive**
16:30 **Workshop for the Pulp, Paper, and Packaging Industry**

Join us for a dynamic, hands-on workshop, tailored for 40-45 industry stakeholders across the supply chain. This intimate session will feature a mix of engaging presentations, roundtable discussions, interactive brainstorming sessions, open forums, and engaging networking, all aimed at fostering collaboration and uncovering innovative approaches to compliance. Learn about how other industry players have faced and solved challenges, and leave equipped with actionable insights and a comprehensive understanding of how to thrive amidst regulatory changes.

****Please note that workshop attendance requires an additional fee ****

17:00- **Sip and Connect | Networking Drinks**

18:30 Join us for an evening of exciting networking, where you can enjoy a selection of refreshing drinks and light bites as you connect with old friends, meet new peers, and engage in meaningful conversations. This is the perfect opportunity to spark conversations, build relationships, and set the tone for an unforgettable conference.

TUESDAY 4TH MARCH

06:30 5K Run Club

Kickstart your day with an energizing 5K run through the scenic streets of Lisbon, led by our Run Club guide. A perfect way to clear your mind and get ready for the day ahead.

07.30 Registration Opens

The Thought Lab

07:30 Breakfast Workshop | Could AI Outperform Humans in Paper Machine Operations?

Step into a future where machines don't just assist but revolutionise how production lines operate. This engaging workshop invites you to explore the cutting-edge potential of AI in transforming the paper, board, packaging, and tissue industries. Learn how AI-driven technologies can analyse complex production data, enhance operational efficiency, and deliver smarter, faster decisions—potentially outperforming human capabilities.

Don't miss this opportunity to gain actionable insights, spark new ideas, and stay ahead in a rapidly evolving industry. Whether you're curious or sceptical about AI's role, this session promises a lively, thought-provoking discussion tailored to drive innovation in your operations.

Brought to you by Tietoevry.

Main Stage

08.40 Opening Remarks

SESSION ONE | The Executive Edge

08.50 Keynote

Europe's Economic Evolution: Navigating the New Normal

As geopolitical tensions reshape the global landscape, Europe faces a shifting economic future. Join us as we explore the key challenges and strategies for recovery and growth in the next five years.

- How will tensions between East and West impact Europe's economy?
- What role will US trade policy play in shaping global flows?
- Can Europe bounce back from the pandemic's economic effects?
- How will inflation and rising costs affect consumer spending?
- What strategies will drive Europe's recovery and long-term growth?

Rym Ayadi, Founder & President, **Euro-Mediterranean Economists Association**; Professor, City of London University and Bayes Business School; Co-Founder, **Brain Capital Alliance**



09.15 **Award**

European CEO of the Year Award & Address

Presented by StepChange

09.20 **Panel Discussion**

Executive Leaders Panel: Shaping Tomorrow's Pulp, Paper, and Packaging Landscape

Join our esteemed panel of executive leaders, as they discuss the challenges and opportunities facing the sector in an evolving landscape.

- **Staying Competitive:** What strategies can executives implement to maintain a competitive edge amid rapid industry changes?
- **Sustainability and Innovation:** What advancements in sustainable practices and technologies are shaping the future of the sector?
- **Overcapacity and Market Consolidation:** What are the implications of overcapacity in the industry, and how can companies effectively navigate potential market consolidation?
- **Geopolitical Headwinds:** How are global political dynamics impacting the paper and packaging industry?

Moderator:

Joachim Klein, *Managing Director, StepChange*

Speakers:

Jose Soares De Pina, *Chief Executive Officer, Altri*

António Redondo, *Chief Executive Officer, The Navigator Company*

10:05 **Presentation:**

The Sustainable Packaging Revolution – Shaping a Consumer Driven Future

- Key drivers and strategies for transitioning to sustainable packaging.
- Consumer influence on innovation and industry trends.
- Overcoming hurdles and turning challenges into growth opportunities.
- Practical steps for staying ahead in the sustainable packaging shift.
- Impact of regulations, preferences, and technology on the next decade.

10.30 **Networking Break**

| Main Stage | The Thought Lab |
|--|--|
| SESSION TWO Framing the Future | |
| 11.00 Fastmarkets Focus Macroeconomic Outlook <ul style="list-style-type: none"> · Global economic drivers | 10:45 Roundtable Discussion Voluntary Carbon Market |

- Expected social, political, and economic headwinds
- Inflation and recession drivers
- Market trends & risks
- Key drivers of growth and investment in the industry

Lasse Sinikallas,
Director of Macroeconomics,
Fastmarkets

11.20 **Presentation**

Transport Cost Outlook:

Warning Issued in Container Shipping

- Global shipping trends
- Freight pricing
- Shipping risks and opportunities
- How might geopolitical tensions in the Middle East further affect shipping for the industry?

Philip Damas,
Managing Director, Founder &
Head of Supply Chain Advisors,
Drewry Shipping Consultants

11.40 **Panel Discussion**

Shifting Trade Flows: How Will Changing Dynamics Impact Global Trade?

Join key global players as they share insights on trade flows, strategies to navigate shipping challenges, and the impact of rising costs on profit margins

- How are geopolitical tensions reshaping global trade in forest products?
- What challenges do shipping dynamics pose for industry trade flows?
- Insights on growth opportunities in key regions: China, South America, North America, and Europe.
- Emerging market growth and where the future may take the sector?

Moderator:

Rafael Barisaukas, *Senior Economist – Latin America Paper & Packaging,* **Fastmarkets**

Speakers:

Fabio Almeida de Oliveira, *Executive VP – Paper and Packaging Business Unit & President - Packaging US,* **Suzano**

12.25 **Fastmarkets Focus | Global Pulp Outlook**

- Projected growth forecast
- How will market pulp availability shape industry dynamics?

- What are the implications of overcapacity on the market?
- Demand trends for 2025 and beyond – will we see a return to pre-pandemic “norms”?

Patrick Cavanagh, Senior Economist, **Fastmarkets**

12.40 **Presentation**

Europe’s Softwood Fibre Crisis: Exploring Future Solutions

Russia’s invasion of Ukraine and the subsequent ban on Russian wood imports have created a softwood fibre shortage across Europe. This session will explore how companies can navigate these challenges through innovation, despite regulatory pressures and the increasing demand for pulp in energy production.

- Balancing supply and demand
- Cost implications of the wood fibre shortage?
- Can hardwood replace softwood fibres?
- Optimizing fibre mixes for product needs
- Can growth regions like Latin America step in to supply Europe?

Tomi Amberla, Director, **AFRY**

13.00 **Networking Lunch**

Main Stage

SESSION THREE | Paper’s Next Chapter

14:00 **Fastmarkets Focus | Graphic Paper Outlook**

- Market Outlook & Projections: What does the future hold for graphic paper?
- Industry Evolution: With graphic paper demand declining, where will the sector be in five years?
- Newspaper & Magazine Trends: Exploring market share and growth potential in these segments.
- Emerging Opportunities: Are there any types of graphic paper are gaining traction in the market?

Alejandro Mata, Director – Europe, Graphic & Packaging Paper, **Fastmarkets**

14:20 **Panel Discussion**

The Paper Jam: What Lies Ahead for Europe’s Paper Industry?

- Graphic Paper’s Decline: What Lies Ahead?
- Is digitalisation a lifeline or replacement for the sector?
- What impact will overcapacity have on future production and market demand?
- Important decisions: the role of advertising and purchasing decisions
- How will companies stay competitive in an evolving landscape?
- Where will innovation lead the industry next?
- The role of sustainability in future market growth

Alejandro Mata, Director – Europe, Graphic & Packaging Paper, **Fastmarkets**



15:05 **Fastmarkets Focus | Tissue Market Outlook**
Philipp Jaki, European Economist – Tissue, Fastmarkets

| Main Stage | | The Thought Lab | |
|--------------|-------------------------|-----------------|--|
| 15:25 | Networking Break | 15:25 | Brainfood Break Latin America Paper Products Outlook <i>Join fellow attendees for this intimate presentation and discussion on the Latin American pulp & paper products market.</i> <ul style="list-style-type: none"> Rafael Barisauskas, Senior Economist – Latin America Paper & Packaging, Fastmarkets |

SESSION FOUR | Innovation & Market Growth

15:55 **Presentation**
Spotlight on Portugal: The Rise in Eucalyptus Pulp

- Market growth for BEKP
- Rising demand for sustainable pulp solutions
- Portugal's key role in industry growth
- Overcoming NIMBYism around forest fire concerns

16:15 **Presentation**
Is Molded Fibre the Answer We've All Been Looking For?

- Rising demand for molded fibre packaging solutions
- Strategies for scaling production while minimizing costs
- Balancing packaging performance and functionality compared to single-use plastics
- The role of molded fibre in shaping the future of the packaging industry
- Emerging innovative technologies driving advancements in molded fibre packaging

Natasha Valeeva, Senior Analyst, F&A Packaging and Logistics, Rabobank

16.35 **Panel**
Packaging Innovation: Reimagining Packaging Design for a Sustainable Future

- The rise in plastic replacement materials
- What new packaging substrates are on the horizon?

- Exploring barrier technologies and substances
- What are the bottlenecks for market entry?
- Overcoming challenges and hurdles with innovative product development

Speakers:

- **Lennart Eberleh**, Chief Executive Officer, **Rottneros**
- **Krzysztof Krajewski**, Chief Sustainability & Innovation Officer, **RDM**

Main Stage

17:30-19:30 **Sip and Connect | Networking Drinks**
Panoramic Bar

Join us for an unforgettable evening of networking at the iconic Panoramic Bar. Sip on cocktails and indulge in delicious canapés while making new connections, and reconnecting with peers and old friends, all set against breathtaking views of Lisbon's stunning skyline. This is your perfect opportunity to unwind, make new connections, and soak in the vibrant atmosphere of the city.

The Thought Lab

17:15-18:15 **Champagne Roundtables**

- 1. Regulation** – Is the EUDR a Roadblock or Roadmap?
- 2. Molded Fibre** – What Does the Future Hold for Molded Fibre in Europe: Is It a Worthy Investment or Innovation Overload?
- 3. Recycling** – How Can the Industry Collaborate to Meet 2030 Recycling Targets Amidst Diverse European Regulations?
- 4. AI & Automation** – What Impact Can AI and Automation Have on Production Processes, and Where Are the Key Growth Opportunities?
- 5. Softwood vs Hardwood** – Is it Feasible to Replace Softwood in the Face of Fiber Shortages and Supply Chain Challenges?
- 6. Market consolidation** – What Challenges and Opportunities Does Market Consolidation Present to the Industry?
- 7. Mill Decarbonisation** – How Can the Pulp and Paper Industry Achieve Its Decarbonisation Targets While Driving Innovation?
- 8. Paper & Board Market** – What Key Factors Will Drive Success Amid Market Decline and Increasing Conversions?



WEDNESDAY 5TH MARCH

07:30 **Registration Opens**

The Thought Lab

07:30 **Breakfast Workshop | Empowering Inclusivity and Gender Diversity**

Engage in an exclusive, forward-thinking roundtable discussion dedicated to advancing inclusivity and diversity in the forest products supply chain. This closed-door breakfast discussion offers around 30 industry influencers a collaborative environment to address the challenges and opportunities of fostering a more inclusive and innovative sector. Participants will discuss strategies for driving sustainable growth, share experiences, and explore the evolving role of women in leadership, all while shaping actionable steps for a more inclusive industry future.

Main Stage

SESSION FIVE | Forward Facing Insights

8:55 **Welcome Remarks**

09.00 **Fireside Chat**

Thriving After the Merger: Unlocking Success in a Transforming Industry

Join us for an engaging interview with one of the industry's most respected leaders, as they share their experiences navigating transformative changes, exploring the implications of change, and opportunities that arose. Discover key strategies for thriving in changing times and learn how to stay at the forefront of industry developments while managing costs, enhancing sustainability, and fostering effective leadership.

Saviero Mayer, Chief Executive Officer – Europe, Smurfit-Westrock

09.25 **Presentation**

Strategic Pathways: Adapting to Europe's Regulatory Demands

With ambitious decarbonisation and deforestation targets to reach, the industry is on the brink of significant change. As we approach key milestones of 2030 and 2050, questions about the future abound. How can the industry effectively prepare for the challenges and opportunities that lie ahead?

- Understanding the Commission's Goals: What are the reasons behind the European Commission's ambitious climate targets, and how will they affect the industry?
- Strategies for Compliance: How can companies successfully navigate new regulations and ensure they meet the required standards?

- Regulatory Landscape Ahead: What emerging trends and potential regulatory shifts should the industry anticipate, and how can the industry proactively adapt to stay competitive?

Paula Lehtomaki, *Director General, Finnish Forest Industries & Former Minister of the Environment and Climate Change for Finland*

09:45 **Fastmarkets Focus | Containerboard Outlook**

Tero Eerikainen, *Economist – European Packaging Papers, Fastmarkets*

10:05 **Presentation**

Market Overcapacity: Unboxing Challenges Despite Growth in Demand

Despite the growth in demand of e-commerce, the market faces huge issues with overcapacity. What does this mean for future production and the future of the industry?

- How to navigate the overcapacity problem in the market?
- Impact on demand for raw materials
- How will market players stay competitive?
- What is the true impact on industry investment and innovation?

Ilkka Leppavuori, *Senior Partner & Head of Global Packaging, Bain & Company*

10:25 **Fastmarkets Focus | Boxboard and Kraft Paper Outlook**

Camila Jaramillo, *Economist, Fastmarkets*

| Main Stage | The Thought Lab |
|-------------------------------|---------------------------------|
| 10:45 Networking Break | 10:45 Brunch & Learn |

SESSION SIX | Recycling, Circularity, and Consumer Trends

10:45 **Fastmarkets Focus | Global Recovered Paper Outlook**

- Demand and supply dynamics
- Two-year forecast for market trends and developments
- Global consumption trends and evolving trade patterns amidst geopolitical uncertainty
- Influence of China's economic shifts on the recovered paper market
- Geopolitical issues

- Supply chain uncertainty
- Regulatory challenges, including EUDR, and the potential impact on recovered paper trade

Hannah Zhao, Director – Fibre, **Fastmarkets**

12:30 **Panel**

From Waste to Resource: Exploring Circular Recycling Solutions for 2025 and Beyond

2025 is a year for new regulations, increased demand for recyclable products, and recycled raw materials, join experts in recycling discuss the challenges, opportunities and trends within the European recycling market

- Exploring the Packaging and Packaging Waste Directive: Opportunity for growth or barrier to progress?
- European recycling challenges: From collection rates to material limitations
- Design for Recycling Guidelines: Setting the standards for a sustainable future
- Innovations in recycling: Can we achieve 100% recyclability?
- Future directions: What's next in the journey toward circularity?

12:20 **Presentation**

Consumer Trends Outlook – Rethinking Packaging

In this session, Pro Carton will unveil insights from a comprehensive survey of over 5,000 consumers across Europe, exploring their perspectives on sustainability and packaging. Join us as we dive into the key findings of the report, including:

- Consumer sentiments and pain points
- Consumer preferences in packaging
- The impact of packaging on consumer purchasing decisions
- The critical role of recycling in consumer habits

Winfried Muehling, Marketing & Communications Director, **ProCarton**

12:40 **Panel**

Consumer Brand Perspectives: The Future of Packaging

Join industry leading consumer brands to discuss the evolving packaging landscape from the end-user's perspective

- The evolution of e-commerce: Where has it been, and where is it headed?
- How are FMCG companies adapting to shifting consumer preferences and demands?
- What innovative grades and plastic alternatives are emerging?
- Cost vs. Sustainability: How are brands balancing these crucial factors?
- The impact of regulations like the CRSD on purchasing and product development

13:25 **Networking Lunch**

SESSION SEVEN | The Sustainable Energy Transition

14:25 **Fastmarkets Focus | Powering the Future of Mill Decarbonisation**

- What kind of energy strategies do European pulp and paper mills currently have?
- How are the mills performing in terms of Scope 1 and Scope 2 fossil CO₂ emissions?
- Who are the energy cost winners and losers in the post-crisis reality?
- How does the future look for electricity and natural gas costs?

Ville Henttonen, Director, EMEA Mill Intelligence, **Fastmarkets**

14:40 **Panel**

Driving Towards a Sustainable Industry: How Will the Supply Chain Meet Decarbonisation Targets?

Decarbonisation is now a central focus under the European Green Deal, in this session industry leaders will share their evolving strategies to meet these sustainability goals.

- How will the European pulp and paper industry decarbonise by 2030 and 2050?
- How will suppliers, converters, and end-users meet sustainability targets?
- How is the industry tapping into energy investments for a greener future?
- What roles do renewable energy sources such as biomass, wind, and solar play in driving sustainability?
- What are the challenges with the industries key energy inputs and outputs?
- Are there any untapped but sustainable energy solutions waiting to be explored?

Moderator: **Ville Henttonen**, Director, EMEA Mill Intelligence, **Fastmarkets**

Speakers:

- **Sarah Price**, Head of Sustainability, **Sappi**

15:25 **Panel**

The EUDR – Will Europe's Industry Thrive or Simply Survive?

- What challenges does the EUDR present for the industry?
- What opportunities does the regulation pose for deforestation?
- Which areas of the supply chain are most likely to face bottlenecks?
- What strategies and solutions are being implemented to prepare?
- How will the regulation reshape European trade in forest products?
- What lies ahead for 2026 and beyond?

Moderator: **Andrea Venturini**, Price Reporter, **Fastmarkets**

Speakers:

- **Mike Turner**, Managing Director, **European Carton Makers Association**

16:05 **Presentation**

The Carbon Boom: How Will Growth in Carbon Markets Impact Forest Products?

- How is the rapid expansion of global carbon credit markets reshaping the forest products industry?
- Overview of carbon credit market and project growth over next 5 years?
- Impact of increased demand for forest carbon credits on fibre availability



- What areas and regions are likely to be impacted?
- What impact might this have on investment in the sector?
- Can carbon markets and forest product industries co-exist?
- What role does regulation play in all of this?

16:30 **End of Conference**
